

ARIZONA BOARD OF REGENTS

THIS IS A VIRTUAL MEETING

April 14-16, 2021

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Schedule of Events and Meetings

Wednesday, April 14, 2021

3:00 p.m. – 5:30 p.m. Executive Session
(3:00 – 5:30 p.m. – Executive Director Review of Assignments)

Thursday, April 15, 2021

8:30 a.m. – 12:30 p.m. ABOR Meeting

12:30 p.m. – 1:30 p.m. Break for Lunch

1:30 p.m. – 5:00 p.m. Executive Session
(1:30 p.m. – 2:30 p.m. – President Cheng Review of Assignments)
(2:45 p.m. – 3:45 p.m. – President Crow Review of Assignments)
(4:00 p.m. – 5:00 p.m. – Enterprise Executive Committee Review of Assignments)

Friday, April 16, 2021

9:00 a.m. – 12:15 p.m. Executive Session
(9:00 a.m. – 11:00 a.m. – President Robbins Review of Assignments)
(11:15 a.m. – 12:15 p.m. – President-Designee Cruz Review of Assignments)

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Wednesday, April 14, Thursday, April 15,
and Friday, April 16, 2021

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Wednesday, April 14, 2021

3:00 p.m. CALL TO ORDER

3:01 p.m. EXECUTIVE SESSION

Pursuant to A.R.S. §38-431.03, the board will convene in executive session to discuss items identified on the executive session agenda.

5:30 p.m. RECESS

Thursday, April 15, 2021

8:30 a.m. RESUME PUBLIC MEETING, GREETINGS AND ANNOUNCEMENTS FROM THE BOARD CHAIR

8:35 a.m. CALL TO THE AUDIENCE

During each regular board meeting, the board conducts a “Call to the Audience” when members of the public may address the board regarding issues related to board governance. Due to the virtual nature of this board meeting and processes put in place to address Covid-19 and recommendations to limit the size of gatherings, the Call to the Audience will be conducted via written submissions. To provide a written submission, members of the public must submit a form by clicking on the following: <https://www.azregents.edu/virtual-call-to-the-audience>

If you would like to submit additional materials for distribution to the board, please use the form to upload attachments. These materials along with the written submission provided will be distributed to the board.

Because of the diversity of issues presented, Regents will not respond to the written submissions at the meeting. The written submission from members of the public will be recorded and referred to the appropriate university or board staff for follow-up, if necessary and if contact information is provided. The board is informed of the outcomes of the staff efforts to respond to the concerns submitted.

Should you wish to mail your comments directly to the Board of Regents, please address them to:

Larry Penley, Chair
Arizona Board of Regents
2700 N. Central Avenue, Suite 400
Phoenix, AZ 85004

Submissions will be accepted until 8:00 a.m. on Thursday, April 15, 2021. After that time, please use the form at: <http://azregents.edu/contact-us> to submit any questions or comments to the board.

Forms submitted will become part of the public record.

Individuals with disabilities may request reasonable accommodations, including the use of interpreters, alternative formats, or assistance with physical accessibility. Requests for assistance should be made to the board secretary (602 229-2540) as far in advance of the meeting as possible to allow time to arrange accommodations.

8:40 a.m. ADOPTION OF CONSENT AGENDA ACTION ITEMS AND ACCEPTANCE OF CONSENT INFORMATION ITEMS

All items on the Consent Agenda are listed at the end of this agenda, underlined and marked with an asterisk (*). These items will be considered by a single motion with no discussion. All other items will be considered individually.

8:45 a.m. FINANCE, CAPITAL AND RESOURCES COMMITTEE

- 1. Setting Base Tuition and Mandatory Fees, Differential Tuition and Program Fees, Class Fees and other academic fees, and Residence Housing and Meal Plans for the 2021-2022 Academic Year**

The board office asks the board to review and approve the universities' proposed 2021-2022 base tuition, mandatory fees, all academic fees; and residence housing and meal plans for Arizona State University, Northern Arizona University and the University of Arizona.

- 2. Review of Multiple-year Employment Agreement for Women's Basketball Head Coach (UArizona)**

The University of Arizona ("UArizona") asks the board to approve the Second Amended Multiple-year Employment Agreement for Women's Basketball Head Coach Adia Barnes.

9:10 a.m. ADMINISTRATIVE BUSINESS

- 3. Election of Officers**

The board office asks the board to elect officers for one-year terms beginning July 1, 2021, as set forth below.

- 4. Placeholder**

9:20 a.m. ACADEMIC AFFAIRS AND EDUCATIONAL ATTAINMENT COMMITTEE

- 5. Appointment of Regents Professors for Northern Arizona University**

Northern Arizona University asks the board to approve the appointment of seven Regents' Professors effective July 1, 2021: Scott Goetz (School of Informatics, Computing and Cyber Systems), Jani Ingram (Department of Chemistry and Biochemistry), Bjorn Krondorfer (Department of Comparative Cultural Studies), Yiqi Luo (Department of Biological Sciences), Michelle Mack (Department of Biological Sciences), Edward Schuur (Department of Biological Sciences), Miguel Yacamán (Department of Applied Physics and Materials Sciences)

6. Appointment of Regents Professors for University of Arizona

The University of Arizona asks the board to approve the appointment of six Regents Professors: Steven Archer (Natural Resources & the Environment); Sonia Colina (Spanish & Portuguese); Marwan Krunz (Electrical & Computer Engineering); Dante Laretta (Planetary Sciences/Lunar & Planetary Laboratory); Sallie Marston (Geography & Development); and Ian Pepper (Environmental Science).

7. First-Time Student Retention Report

The board will review the First-Time Student Retention Report and will engage in a discussion with the universities.

10:00 a.m. 20-MINUTE BREAK

10:20 a.m. UNIVERSITY OF ARIZONA OPERATIONAL AND FINANCIAL REVIEW

8. University of Arizona Operational and Financial Review

University of Arizona asks the board to engage in a presentation and discussion regarding its Fiscal Year 2020-2021 operational and financial review.

11:50 a.m. STUDENT REGENT REPORT.

9. Basic Needs Update

The board will receive a Basic Needs Update.

12:20 p.m. REPORT FROM THE ARIZONA FACULTIES COUNCIL

12:25 p.m. INQUIRIES, REQUESTS, REPORTS, AND COMMENTS FROM REGENTS AND MEMBERS OF THE ENTERPRISE EXECUTIVE COMMITTEE

12:30 p.m. RECESS

1:30 p.m. RECONVENE EXECUTIVE SESSION

Pursuant to A.R.S. §38-431.03, the board will reconvene in executive session to discuss items identified on the executive session agenda.

5:00 p.m. RECESS

Friday, April 16, 2021

9:00 a.m. RECONVENE EXECUTIVE SESSION

Pursuant to A.R.S. §38-431.03, the board will reconvene in executive session to discuss items identified on the executive session agenda.

CONSENT AGENDA

These items were considered by a single motion with no discussion and approved earlier in the meeting.

10. *Minutes

(a) November 18-20, 2020 Executive Session Minutes, (b) December 4, 2020 Special Executive Session Meeting, (c) January 28, 2021 Special Meeting, (d) February 17-18, 2021 Regular Board Meeting Minutes, (e) March 10, 2021 Special Board Meeting

FINANCE, CAPITAL AND RESOURCES COMMITTEE

11. *Report on the Finance, Capital and Resources Committee Meeting

The board office asks the board to review the report of the April 1, 2021 Finance, Capital and Resources Committee meeting.

12. *Review of 450 South Tucson Blvd. Property Purchase (UArizona)

The University of Arizona (UArizona) asks the board to approve the purchase of a 3.85-acre site improved with a 23,011 square foot building, located at 450 South Tucson Blvd. in Tucson, AZ, adjacent to UArizona's Rincon Vista Sports Complex and Mulcahy Soccer Stadium.

13. *Review of Request to Extend Lease Agreement for Office and Classroom Space located at the Arizona Center (ASU)

Arizona State University (ASU) asks the board to approve the request to enter into a 60-month lease extension, plus a two-year renewal option, with AGP Arizona Center Owner, LLC for 43,802 square feet of office and classroom spaces located at One Arizona Center, 455 N. 3rd Street, Phoenix, AZ (the "property").

14. ***Acquisition of Property at 855 and 903 South Rural Road, Tempe, AZ (ASU)**

Arizona State University (ASU) asks the board to approve the acquisition of real property located at 855 and 903 South Rural Road, Tempe, AZ from ACC SC Development, LLC.

15. ***Review of Each University's Share of the Assets and Liabilities under the Public Safety Personnel Retirement System**

The board office asks the board for consideration and acceptance each university's share of the assets and liabilities under the Public Safety Personnel Retirement System (PSPRS) based on PSPRS' June 30, 2020 actuarial valuation reports for each university.

16. ***Sunset Review of Fees for CY 2020 (ASU)**

Arizona State University (ASU) asks the board to approve the sunset review of fees for CY 2020.

17. ***Sunset Review of Fees for CY 2020 (NAU)**

Northern Arizona University (NAU) asks the board to approve the sunset review of fees for CY 2020.

ACADEMIC AFFAIRS AND EDUCATIONAL ATTAINMENT COMMITTEE

18. ***Report on the Academic Affairs and Educational Attainment Committee Meeting**

The board office asks the board to review the report of the April 1, 2021, Academic Affairs and Educational Attainment Committee Meeting.

19. ***Proposed Revisions to ABOR Policy 2-325 "Arizona Teachers Academy" (Second Reading)**

The board office asks the board to approve on second reading the proposed revisions to ABOR Policy 2-325 "Arizona Teachers Academy" to process emergency requests.

20. ***University of Arizona's Proposal to Provide a Novel Degree Program within Arizona by Extending its Bachelor of General Studies at the University's Existing Sites to Chandler, Arizona**

The University of Arizona asks the board to approve its Bachelors of General Studies at the university's existing site in Chandler, AZ.

21. *Request for New Academic Units for Arizona State University

Arizona State University asks the board to approve the new academic unit requests effective in the 2021-2022 catalog year.

22. *Request for New Organizational Unit for Northern Arizona University

Northern Arizona University asks the board to approve the new organizational unit request effective in the summer of 2021.

23. *Request for New Academic Programs for the University of Arizona

The University of Arizona asks the board to approve the new program requests effective in the 2021-2022 academic year.

24. *Proposed Revision to ABOR Policies 2-325 “Arizona Teacher’s Academy” (First Reading and Immediate Implementation)

The board office asks the board to review on first reading and adopt for immediate implementation the proposed revisions to ABOR Policy 2-325 “Arizona Teachers Academy”.

25. *Proposed Revisions to ABOR Policies 4-201 “Definitions for Residency Classifications”, 4-203 “Requirements to be Considered in Determining an Individual’s Residency Classification for Tuition Purposes”, 4-205 “Residency Classification Appeal Procedures” and Repeal of 4-206 “Miscellaneous Provisions” (First Reading)

The board office asks the board to review on first reading the proposed revisions to ABOR Policies 4-201 “Definitions for Residency Classifications”, 4-203 “Requirements to be Considered in Determining an Individual’s Residency Classification for Tuition Purposes”, 4-205 “Residency Classification Appeal Procedures” and Repeal of 4-206 “Miscellaneous Provisions”.

RESEARCH AND HEALTH SCIENCES COMMITTEE**26. *Report on the Research and Health Sciences Committee Meeting**

The board office asks the board to review the report of the March 26, 2021 Research and Health Sciences Committee Meeting.

27. *Proposed Distribution of TRIF Revenue on COVID-19 Detection, Monitoring and Impact Projects

The board office asks the board to approve the distribution of \$3,000,000 in TRIF revenues for the universities' collaborative COVID-19 activities and projects.

AUDIT COMMITTEE

28. *Report on the Audit Committee Meeting

The board office asks the board to review the report of the April 1, 2021, Audit Committee Meeting.

12:15 p.m. ADJOURN

PLEASE NOTE: This agenda may be amended at any time prior to 24 hours before the board meeting. Estimated starting times for the agenda items are indicated; however, discussions may commence, or action may be taken, before or after the suggested times. Any item on the agenda may be considered at any time out of order at the discretion of the board chair. The board may discuss, consider, or take action regarding any item on the agenda. During the meeting, the board may convene in executive session pursuant to A.R.S. §38-431.03(A)(3) for legal advice regarding any item on the agenda.

Board Meeting Schedule

Meeting Schedule for 2020-2021

June 9-11, 2021 NAU

Meeting Schedule for 2021-2022

August 26, 2021	ASU Fulton	September 29-October 1, 2021	NAU
November 17-19, 2021	UA	February 9-11, 2022	ASU
April 6-8, 2022	UA	June 8-10, 2022	NAU

Meeting Schedule for 2022-2023

August 25, 2022	ASU Fulton	September 28-30, 2022	NAU
November 16-18, 2022	UA	February 8-10, 2023	ASU
April 26-28, 2023	UA	June 14-16, 2023	NAU

**ARIZONA BOARD OF REGENTS
EXECUTIVE SESSION AGENDA**

THIS IS A VIRTUAL MEETING

April 14 - 16, 2021

NOTE: This agenda may be amended at any time prior to 24 hours before the board meeting. Executive session is scheduled for 3:00 p.m. on Wednesday, April 14, 2021, at 1:30 p.m. on Thursday, April 15, 2021 and at 9:00 a.m. on Friday, April 16, 2021. Executive session may be recessed and continued as necessary.

Statutory Authorization A.R.S. § 38-431.03	Items to be Discussed
(A. 2)	I. Review of minutes of previous executive session(s)
	II. From the board, board office staff or counsel to the board
(A. 1, 3 & 4)	A. Review of assignments – Presidents, President-Designee, Executive Director and Enterprise Executive Committee
(A. 3 & 4)	B. Legal advice, discussion and report on pending or contemplated litigation and related filings and matters
(A. 3 & 4)	C. Legal advice and discussion concerning <i>the State of Arizona, ex rel. Mark Brnovich, Attorney General, v. Arizona Board of Regents; John P. Creer, Assistant Vice President for University Real Estate Development at ASU, Defendants, Paul D. Petersen, in his official capacity as Maricopa County Assessor, and Royce T. Flora, in his official capacity as Maricopa County Treasurer, Relief-Defendants.</i> (Case Nos. TX 2019-000011, 1 CA-TX 20-0003 and related filings and matters)

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Instruction re: Confidentiality

Pursuant to A.R.S. §38-431.03(B) & (C) all are reminded that minutes of and discussions that occur in executive sessions are confidential by law and that violations of that confidentiality may subject the individuals involved to such penalties as are prescribed by law, including fines, costs, attorneys' fees, and removal from office.

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EXECUTIVE SUMMARY

Item Name: Setting Base Tuition and Mandatory Fees, Differential Tuition and Program Fees, Class Fees and other academic fees, and Residence Housing and Meal Plans for the 2021-2022 Academic Year

Action Item

Requested Action: The board office asks the board to review and approve the universities' proposed 2021-2022 base tuition, mandatory fees, all academic fees; and residence housing and meal plans for Arizona State University, Northern Arizona University and the University of Arizona.

Background

- This agenda item covers all student tuition and fee requests, including base tuition and mandatory fees, differential tuition, college fees, program fees, class fees and other academic fees; and residence housing rates and meal plans.
- Throughout the year, the board receives information from the universities on their budgets and costs, academic strategic plans, educational quality, enrollment, and financial aid, which provide a framework for the university presidents' tuition proposals.
- The universities' FY 2021-22 proposals include all new and changes to existing tuition and academic fees, and university housing and meal plans.
- Additional information provided to the board for the 2021-22 tuition setting process include the following:

Funding adequacy to achieve Arizona Higher Education goals in the Board's long-term strategic plan outlined in *Impact Arizona*:

- The amount of state support provided to the university system
- Revenues generated from tuition and academic fees
- Uses of incremental tuition and fee revenues

Affordability/Accessibility:

- Cost of attendance/median family income, benchmarked nationally
- Student financial aid
- Net price of tuition/Net Cost of Attendance
- High access/Lower cost options

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EXECUTIVE SUMMARY

- At its November 2020 meeting, the Board received the FY 2020 Student Financial Aid Report, with information on financial aid trends, total student aid, sources of aid, student indebtedness, and financial aid plans for the upcoming year. The annual Student Financial Aid Report is useful for providing a context for how students are meeting the Cost of Attendance at Arizona's public universities.
- On March 26, 2021, the Presidents announced their recommendations for the 2021-22 tuition and fees rates. Each university's recommendations appear under the respective university tab in this Executive Summary.
- In addition to base tuition, the universities charge other academic fees:
 - **College Fee** applies to an entire college, school or division at the undergraduate or graduate level. Criteria for these requests include the quality of the student experience and variance in the cost of instruction.
 - **Differential Tuition** applies to an entire college/school at the undergraduate or graduate level or both. Criteria for these requests include the quality of the student experience, variance in the cost of instruction, and market pricing.
 - **Mandatory Fees** are university specific and charged to all students. Examples of mandatory fees include Information Technology fees to strengthen network infrastructure and provide wireless access, or Student Health Fees to enhance services for students who seek both preventive and acute care, and enhance outreach and wellness education and services.
 - **Program fees** cover other expenses not normally associated with the delivery of a program. Program fees are additional amounts charged to students in select degree programs within colleges, schools or departments, including honors colleges or programs, that demonstrate one or more of the following: higher costs of delivering instruction; the need for or use of special equipment, technology, or key personnel expenses; or market conditions. Criteria for program fee approval include access and affordability, additional costs of the program, increased earnings potential of graduates, market pricing and improving quality.
 - Academic Affairs and Educational Attainment Committee reviews and forwards to the full board any new programs proposed by the universities and associated program fee/differential tuition requirements.
 - **Class fees and deposits** are additional charges for specific classes or courses that have demonstrably higher costs of delivering instruction overall because of the need for or use of special equipment, supplies, technology, key personnel expenses, field trips, or other costs approved by the Board.
 - **Other academic fees** apply to students enrolled as a student at the university, in a program of the university, or in a class offered by the university. Examples of other academic fees include enrollment deposits, freshman orientation fees, ICourse fees, etc.

EXECUTIVE SUMMARY

- Student consultation and involvement is an important aspect of the tuition and academic fee setting process. Through numerous meetings between university and student leadership, both sides gain a better understanding of university and student needs. Included in the universities' fee requests is a section describing the method and outcomes of student feedback on new fee requests or changes to existing fees.

Summary of university requests:**ASU**

- ASU proposes no tuition increases (including online) for both resident and nonresident undergraduate and graduate students for academic year 2021-22. This is the second year in a row with no tuition increases for resident immersion students, and is the tenth year of a ten-year pledge that resident tuition would not increase more than 3 percent in any given year.
- Under ASU's college fee structure, the majority of undergraduate students pay a college fee in addition to base tuition. ASU proposes no changes to its college fee pricing structure. Below is the college fee pricing structure for immersion students:

Resident	Nonresident
○ College Fee Level 1 = \$0	○ College Fee Level 1 = \$0
○ College Fee Level 2 = \$210	○ College Fee Level 2 = \$360
○ College Fee Level 3 = \$770	○ College Fee Level 3 = \$1,320
○ College Fee Level 4 = \$1,050	○ College Fee Level 4 = \$1,800
○ ASU's proposal does include moving the undergraduate college fee for Herberger Institute from College Fee level 3 to College Fee level 4 for all new undergraduate immersion students. ASU plans to expand the Herberger Institute from one location to four in the next two years and expand and upgrade programs, enrollments and facilities.	
• ASU's proposal includes both new program fees and increases to existing program fees for graduate students. ASU requests 10 new graduate program fees in: College of Health Solutions-Strength and Conditioning; College of Nursing and Health Innovation-Regulatory Science; Teachers College-Teacher Certificate (online); College of Law-Human Resources and Employment Law; College of Liberal Arts and Sciences-Women and Gender Studies (online); College of Public Service and Community Solutions-Crime Analysis and Policy Advocacy (online); and WP Carey School of Business-Marketing Certificate (online) and Real Estate Certificate.	
• ASU proposes increases in 10 existing program fees: College of Health Solutions-Audiology, Communication Disorders, and Nutritional Science; Herberger Institute-Architecture and Design; Thunderbird School of Global Management-Global Affairs and Management; and WP Carey School of Business-Accountancy and Taxation.	

EXECUTIVE SUMMARY

- For other academic fees, ASU proposes to establish a seat deposit in the College of Law for Master of Sports Law and Business; and increase the mandatory undergraduate student programs fee \$10 per year, to support programming initiatives, clubs and organizations.
- For housing and meal plans, ASU proposes to increase student housing by an average of 2.25 percent (about \$163 per year) and meal plans by an average of 1.5 percent (about \$67 per year).

NAU

- NAU proposes to maintain its Pledge guaranteed tuition program for 2021-22, and proposes no tuition increases for undergraduate students (both resident and nonresident) at all of its campuses in 2021-22.
- For graduate students, NAU proposes an increase of 5.0 percent for resident and nonresident students at all of its campuses.
- For NAU online, NAU proposes to maintain both undergraduate and graduate online rates at current levels.
- NAU's proposal maintains its mandatory fees at current levels.
- NAU's proposal includes one undergraduate program fee increase in the College of Health and Human Services-Dental Hygiene.
- For housing and meal plans, NAU proposes to increase student housing by an average of 4.45 percent (about \$271 per year). The proposal simplifies the rent rate structure from 17 rates to 5 rent levels and includes the cost of laundry, a reduction in unit capacity in shared-bedroom apartments from three students to two students, and renovation of two residence halls. Meal plans are proposed to increase by an average of 2 percent. Meal plan rates are guaranteed for two years, so for most current participants, there will be no increases for 2021-22.

UA

- UA proposes to maintain its tuition guarantee and proposes no tuition increases for all new and continuing resident undergraduate students at all of its campuses. For all nonresident undergraduate students UA proposes a 1.4 percent increase.
- For graduate students, UA proposes an increase of 1.4 percent for resident students and 0.7 percent for nonresident students at all of its campuses.
- For UA Online, the UA proposes no increases to current rates.
- For UA's global campuses, UA proposes a tuition increase for both its undergraduate and graduate programs located in Peru, and a decrease in its undergraduate program located in China. With the proposed increases rates will range from \$5,500 to \$6,450 per term.

EXECUTIVE SUMMARY

- For the College of Medicine –At COM Tucson, UA proposes a 3 percent increase for first year resident students and one percent increase for incoming nonresident students. Tuition for resident and nonresident continuing resident students in years two through four will be maintained at current levels. For COM Phoenix, UA proposes a 3 percent increase for all resident students and one percent increase for all nonresident students.
- For the College of Veterinary Medicine-- the UA proposes a 2 percent increase for new students starting Fall 2021. No change in tuition is requested for continuing students.
- UA's proposal maintains its mandatory fees at current levels.
- UA's proposal also includes six undergraduate program fee requests (5 new), and ten class fee requests (7 new), and three other academic fee requests (one new).
 - UA requests five new undergraduate program fees and an increase to one undergraduate program fee. The new program fees proposed are in the College of Agriculture and Life Sciences-School of Family and Consumer Sciences, and School of Natural Resources and the Environment; College of Social and Behavior Sciences-School of Information; and College of Sciences-Chemistry and Biochemistry. UA also proposes an increase in the undergraduate Honors College program fee.
 - UA's proposal includes seven new class fees in the College of Agriculture and Life Sciences (CALS)-Animal & Comparative Biomedical Sciences; College of Engineering (COE)-Material Science; College of Science (COS)-Geoscience; College of Social and Behavioral Sciences-History; College of Fine Arts-School of Art; and Eller College of Management-MBA Distance Education Network Program (DNEP). In addition, UA proposes increases to class fees in the CALS and COE.
 - UA also proposes one new academic fee: Sustainability Fee; and increases to two other academic fees: Freshman Enrollment Fee and Transfer Enrollment Fee.
 - For housing, UA proposes no increases to undergraduate or graduate student housing under its management. For Honors Village dorms managed by American Campus Communities, the rate will increase 2.4 percent.
 - UA does not provide meal plans at its residence halls (except at Honors Village), but give students options of purchasing a meal plan through the Student Union, which then provides for discounts at the various eateries throughout campus including the student union. No meal plan increases are proposed for Honors Village.

EXECUTIVE SUMMARY

Strategic Implications

- Revenues generated from tuition and fees play a primary role in funding the universities' Strategic Academic and Business Plans, and the Board's Strategic Plan which can be found on the ABOR website at: <http://www.azregents.edu/impact-arizona/abor-strategic-plan>
- Adequate state funding is critical to making Arizona's public universities accessible and affordable and the level or lack thereof, of state support is one of the principal drivers of tuition decisions. Along with general fund appropriations, tuition and fee revenues support the operations and maintenance of the universities. Lack of sufficient funding from these combined sources limits the universities' ability to meet their planned goals.

Cost Summary

- Under the Presidents' tuition proposals, incremental gross tuition and fee revenues estimates are \$153.0 million: \$91.4 million in base tuition and \$61.6 million in summer session, differential tuition, program fees, college fees, class fees and mandatory fees. Of the \$91.4 million in base tuition, \$88.9 million (97%) is attributable to enrollment growth and change in the mix of students.
- For enrollment, ASU and UA are estimating increases: 4.6 percent (5,426 FTE) at ASU, and 0.4 percent at UA (187 FTE). NAU is projecting a decrease of 2.4% or 698 students for Fall 2021.
- Accounting for the Regents financial aid set aside and other financial aid programs supported from tuition and fees, the net tuition and fee revenues available for operations and strategic initiatives is approximately \$124.2 million.

Committee Review and Recommendation

The Finance, Capital and Resources Committee reviewed and discussed this item at its April 8, 2021 Tuition Workshop meeting.

Statutory/Policy Requirements

- The Arizona Constitution Art. XI Sec. 6 provides that university "*instruction* furnished shall be as nearly free as possible." Article XI Sec.10 provides that the "legislature shall make such appropriations, to be met by taxation, as shall insure the proper maintenance of all state educational institutions, and shall make such special appropriations as shall provide for their development and improvement."
- A.R.S. §15-1626 General Administrative Powers of the Board authorizes the Board to establish tuition.
- Board Policies 4-101 through 4-104 outline the process for which the Board sets tuition and fees.

EXECUTIVE SUMMARY

**Summary of Revenue Impact of Tuition and Fee Increases
 FY 2021-22**

(In Thousands)	ASU	NAU	UA	System Total
Tuition & Fees				
FY21 Gross Tuition & Fee Estimate	\$2,113,446	\$379,408	\$908,969	\$3,401,823
FY22 Tuition Rate Increase	\$0	\$1,386	\$1,098	\$2,484
FY22 Tuition from Enrollment Growth/Change in mix (FY21 Rate)	\$85,753	(\$3,845)	\$7,019	\$88,927
Total Incremental Base Tuition	\$85,753	(\$2,459)	\$8,117	\$91,411
% of Base Tuition due to rate increase	0%	56%	14%	3%
% of Base Tuition due to growth/change in mix	100%	-156%	86%	97%
FY22 Fee Revenue Increases (rate + enrollment growth)	\$52,876	(\$512)	\$9,253	\$61,617
FY22 Gross Tuition and Fee Estimates	\$2,252,075	\$376,437	\$926,339	\$3,554,851
FY22 Gross Incremental Tuition and Fee Revenue	\$138,629	(\$2,971)	\$17,370	\$153,028
Financial Aid:				
Regent Set Aside (Board Policy 4-309)	\$12,427	(\$743)	\$175	\$11,859
Differential Tuition/ Program Fee/College Fee Set Aside (Board Policy 4-104)	\$6,255	\$42	\$157	\$6,454
Other scholarships	\$1,941	\$3,709	\$4,879	\$10,529
Total Financial Aid	\$20,623	\$3,008	\$5,211	\$28,842
FY22 Net Incremental Tuition and Fee Revenue	\$118,006	(\$5,979)	\$12,159	\$124,186
FY22 Incremental State Appropriations (Governor's Recommended Increase over FY 2021)				
Operating	\$15,349	\$7,679	\$9,198	\$32,226
Capital Infrastructure Fund & Reseach Infrastructure Fund	\$145	\$218	\$131	\$494
Total New Sources Available for Ongoing and Strategic Expenditures	\$133,500	\$1,918	\$21,488	\$156,906
Estimated Fall 2021 Increase Student Enrollment (FTE)	5,426	(698)	187	4,915
	4.6%	-2.4%	0.4%	2.8%

EXECUTIVE SUMMARY

University Proposed Strategic Expenditures FY 2022

ARIZONA STATE UNIVERSITY

\$ in Thousands

Enrollment Growth related expenses	\$43,400
Investment in programs supported by fees	\$46,621
Investment in faculty hiring and academic support	39,100
Facilities costs (O&M, utilities, leases)	15,500
Salary merit program	10,400
Debt service	4,900
Support services investments	2,000
Technology investments	1,100
Total Strategic Investments	\$163,021
New Sources Available	\$133,500
Expenditure Reduction/Reallocation	<u>(\$29,521)</u>

NORTHERN ARIZONA UNIVERSITY

\$ in Thousands

Investments in programs supported by fees	299
New Program / New Economy Initiative	7,700
Total Strategic Investments	\$7,999
New Sources Available	\$1,918
Expenditure Reduction/Internal Reallocation	<u>(\$6,081)</u>

UNIVERSITY OF ARIZONA

\$ in Thousands

Investment in Workforce Development for the New Economy	4,600
Faculty & Staff Salary Adjustments (including UCAP)	12,500
Benefits Costs	1,900
Debt Service	5,773
Facilities Costs (operations & maintenance, utilities)	468
Investments in programs supported by fees	931
Veterinary Medicine Program	5,649
College of Medicine MD programs	1,040
Total Strategic Investments	\$32,861
New Sources Available	\$21,488
Expenditure Reduction/Internal Reallocation	<u>(\$11,373)</u>

MEMORANDUM

March 19, 2021

TO: Arizona Board of Regents

FROM:

Michael M. Crow



RE: Tuition/Fee Proposal for FY22

With no tuition increase during FY21, ASU still actively managed COVID and offered multiple strategies for course offerings. The ASU Community of Care concept was implemented upon the students' arrival in August which included a Community of Care kit and signage throughout the university related to masking and remaining safe distance to one another. Hundreds of classes were upgraded to ASU Sync mode and COVID testing was made readily available. And, a health app was developed for employees and students to use daily. The symptom checklist results would give the go ahead of whether to arrive on campus or remain off campus.

ASU's Biodesign Institute created the first saliva-based COVID-19 test in the Western United States. A drinking straw and a tube are all one needs to collect a sample. The fast, easy and free test has been given to 700,000+ people across Arizona.

With vaccine availability, ASU once again offered immediately to partner with the state and provided vaccinations to the public and the university community. These operations are ongoing. As of this date, over 600,000 vaccinations have been administered by ASU.

Also, with the generous support from the Arizona Department of Education, the Governor's office, Helios Education Foundation and ASU itself, ASU Prep Digital offered free trainings through the Arizona Virtual Teacher Institute. Over 8000 teachers representing 367 districts from more than 1000 schools across the state were provided 400 separate trainings aimed at bridging the divide of remote learning and providing instructional tools that can be utilized beyond the current pandemic.

Contemporaneously, ASU continued to advance on numerous fronts and the following are a few highlights:

Office of the President

Fulton Center 410, 300 E University Drive, PO Box 877705, Tempe, AZ 85287-7705
p: 480-965-8972 f: 480-965-0865 president.asu.edu

ASU No. 1 in innovation for the sixth straight year

In recognition of the university's culture of discovery, U.S. News & World Report named ASU the most innovative university in the nation for the sixth year in a row, as well as one of the top 50 public schools in the U.S.

Dreamscape Learn

Hollywood meets Tempe, as Dreamscape Immersive, the world's leading virtual reality company, and ASU have teamed up to transform education through exploration with Dreamscape Learn. Dreamscape Learn will add avatar-driven VR experiences to both campus-based and online courses, starting with introductory biology and eventually expanding throughout the sciences and beyond.

The College of Global Futures

ASU launched a laboratory dedicated to keeping our planet habitable and enhancing the options for future generations to thrive. ASU's Julie Ann Wrigley Global Futures Laboratory, building on a strong tradition of commitment to shaping a sustainable future for all humankind through innovation, will encompass a new college with three unique schools, as well as a major research institute and a practice arm devoted to solutions, each significantly enhanced by and integrated with global partnerships.

Sidney Poitier New American Film School naming

January 25, 2021, ASU announced its film school as the Sidney Poitier New American Film School after the first Black performer to win the Oscar for best actor. Actor, film director, civil rights activist, author, ambassador, father—Sir Sidney Poitier is a groundbreaking international film icon whose life, both onscreen and off, stands as an example of strength, passion, depth and integrity.

New facilities opened

Lantana Hall

Opened in Fall 2020, Lantana is a state-of-the-art facility that houses first-year students from a variety of residential colleges, as well as upper division students. Lantana Hall also serves as home for Barrett, the Honors College at the ASU Polytechnic campus. Lantana Hall includes a generous amount of common space, including many multipurpose and meeting spaces, student activity lounges, administrative offices, academic classroom spaces, and more.

ASU Health Futures Center

Located next to the Mayo Clinic Hospital in north Phoenix, the facility represents an evolution of the Mayo Clinic in Arizona related to significant clinical and scientific

research expansion into new areas of biomedical, health solutions, population health, and health decision-making. The leading-edge facility features a med-tech innovation accelerator, biomedical engineering and informatics research labs, and an innovative education zone. Programs from several ASU schools and colleges benefit from the proximity of this facility to the Mayo Clinic Hospital and Cancer Center. ASU programs include College of Health Solutions, College of Nursing and Health Innovation, Fulton Schools of Engineering, and Entrepreneurship and Innovation, as well as collaboration programs within the Mayo Clinic.

Mirabella at ASU

Mirabella at ASU is a new \$252 million, 20-story intergenerational living and lifelong learning complex located on the northwest corner of the Tempe campus. Mirabella features 246 independent-living apartments and 52 health care units, as well as an indoor pool and wellness center, physical therapy gym, theater, art museum, event and lecture hall, game rooms, salon and spa, dog park, valet and underground parking and four restaurants that eventually will be open to the public. Residents of Mirabella can take classes at ASU as 'guest learners', have full access to the campus' amenities, and be near cultural and sports events.

Wexford

The \$77 million, 225,00-square-foot Wexford building will be the first piece of a 7-acre parcel ASU is responsible for on the city's 30-acre biomedical campus. ASU will lease approximately 112,000 square feet — half of the building — for 15 years with three five-year options. The remainder will be occupied by private-sector companies — the part that organizers say makes this step so important to the city, to the campus and, ultimately, to discovery and innovation. Wexford is a real estate company focused exclusively on partnering with universities, academic medical centers and research institutions to develop vibrant, mixed-use, amenity-rich knowledge communities that are built on a foundation of research, discovery and entrepreneurial activity.

Tuition Proposal

The current pandemic, having continued beyond an entire year and into the spring semester, resulted in many individuals, including our students and their families, impacted financially. Therefore, on behalf of Arizona State University, I am proposing no tuition increase for the second consecutive academic year through FY22. The strong commitment to financial aid and overall student support will also continue to be at the forefront.

Fee Proposals:

The Herberger Institute for Design and the Arts proposes to move from Undergraduate College Fee level 3 to 4. And, there are several graduate program fees, all of which are within the market range of peer schools as identified in the Fees Section of the proposal; a deposit fee for the Master of Sports Law and Business which will be applied to the program should a student enroll; and a small increase to the undergraduate student programming fee to support the increased number of requests for student engagement.

Undergraduate College Fee

Herberger Institute for Design and the Arts

Undergraduate Campus Immersion

\$140/semester increase for resident students

\$240/semester increase for non-resident students

The Herberger Institute seeks to move from Undergraduate College Fee level 3 to level 4 for all new undergraduate campus immersion students as it grows from one location to four in the next two years while expanding and upgrading programs, enrollments, and facilities to meet the need of the 21st century creative learner. The proposed fee increase will be used to maintain and upgrade facilities, support and expand creative technologies, grow creative career services and experiential learning opportunities, and provide a dynamic student experience alongside intentional student support resources. The Herberger Institute runs lean and, even with the fee increase, will still continue to be under the costs of many closest competitors and aspirational peers.

Graduate Program Fees

College of Health Solutions

Doctor of Audiology

\$800/semester program fee increase

The Doctor of Audiology (AuD) degree is the terminal degree required for certification and the practice of Audiology by the American Speech-Language-Hearing Association (ASHA). This program is ranked among the top 25 accredited programs in the U.S. The primary benefit of this fee is greater depth and breadth of clinical training and subsequent ability to gain employment in more competitive jobs upon graduation.

Audiologists diagnose and treat hearing, balance, and other auditory disorders in patients across the age spectrum. Certification requires a Clinical Doctorate degree and 1,820 clinic hours supervised by a licensed Audiologist with a Certificate in Clinical

Competence from ASHA. Due to the extensive clinical training required, AuD students in this program complete a full year clinical rotation in a hospital, doctor's office or other clinical setting in year four of the program. This requires an extensive network of clinical externships in Arizona and across the U.S. to fulfill these requirements.

MS Communication Disorders

\$1,700/semester program fee increase

The master's degree in Communications Disorders is the terminal degree required for certification and the practice of speech-language pathologists (SLP) by the American Speech-Language-Hearing Association (ASHA). The ASU program is ranked among the top 25 accredited programs in the U.S. The primary benefit of this fee is greater depth and breadth of clinical training and subsequent ability to gain employment in more competitive jobs upon graduation.

SLP students train to work with adults and children who have a wide variety of speech, language, swallowing and voice disorders. Certification requires 400 direct-patient clinical hours that must be supervised by a licensed and certified SLP and each student must demonstrate competence in assessment and treatment across nine disorder areas. Additionally, ASU offers one of the nation's few bilingual SLP programs. Features of the program that will be improved by the additional revenue generated include:

- Clinical rotations completed both on campus and at paid off-site locations by licensed SLPs who specialize in different disorders. This requires access to a wide and diverse range of clinicians.

- Access to highly specialized, and often costly, medical equipment, technology and clinical tracking software needed to educate and train students properly. In particular, students will benefit from access to simulation equipment and experiences in order to reduce patient risk, such as treating children in a NICU setting.

- Interpreters and speech-language pathologists who specialize in multilingual and multicultural assessment and intervention so that all students get training in working with populations that do not speak English as a native language.

MS Nutritional Science (Dietetics) - Online

\$45/credit hour program fee increase

Although not currently required to become a Registered Dietitian (RD), the Academy of Nutrition and Dietetics (AND) will change the minimum education requirement to a graduate degree, starting in 2024. Current RDs elect to enroll in the Nutritional Science (Dietetics) master's degree to increase their lifetime earning potential, while simultaneously aligning their academic credentials with the future educational standards.

Students in this program take intensive courses that enhance their existing skills in project management, interpretation of research literature, critical inquiry, and problem solving. This non-thesis program requires students to complete a six credit hour applied

project. The purpose of the fee is to maintain a high-quality educational experience for this fully online program by utilizing cutting edge curriculum design and technology, hiring high quality faculty, and providing support through academic advising. The increase in program fee will allow for additional faculty support for the applied project as well as for guest lecturers who are experts in the field to enrich the student learning experience.

MS Strength and Conditioning

\$2,500/semester – new program fee

The Master of Science in Strength and Conditioning will enable ASU to be recognized and ranked nationally as the standard for education in the strength and conditioning field. Optimizing human health and performance for athletic competitors and occupational athletes is often overlooked in the broader health community, and the ability to work with these individuals requires specialized knowledge and skills related to these specific populations. The National Strength and Conditioning Association (NSCA) will begin accrediting programs for strength and conditioning in Spring 2022. This degree program has been designed to meet the requirements of the proposed accreditation standards and will be eligible for early participation in the accreditation process, allowing ASU to be one of the pioneers in this field.

Program fees will be used to pay for specialized faculty, specialized equipment, advising and support staff, and the cost for maintaining accreditation of the program.

Edson College of Nursing and Health Innovation

MS Regulatory Science

\$2000/semester – new program fee

The MS in Regulatory Science program prepares students to achieve high level positions within the food and drug industry. This program requires national and international subject matter experts who are active in the industry and who bring specific expertise to the program and courses they teach. Preparation for work in these fields also requires exposure to specialized simulation and professional certification software. The program fee will enable smaller student to faculty ratios to facilitate student success and meet accreditation requirements.

Herberger Institute for Design and the Arts

M of Architecture; M of Visual Communication Design; M of Industrial Design; M of Interior Architecture; M of Landscape Architecture; M of Urban Design

\$575/semester program fee increase

The M of Architecture, M of Industrial Design, M of Interior Architecture, M of Landscape Architecture, M of Visual Communication Design, and M of Urban Design degrees are professionally-based design degrees in which students work to develop and refine their creative skills to obtain upper-level positions within the creative industries. The Master of Architecture program is a professionally-accredited program that prepares students for their eventual licensure as architects. The current program fee amount was established in 2011 and, since that time, the costs associated with offering these programs have risen substantially. The Design School now serves a large graduate cohort with inadequate revenues to cover the 2020 costs of offering such high quality programs. This request will enable appropriate support for these students while keeping the programs well-placed within the overall market. Program fees will significantly enhance the quality of the student experience, providing improvements to the curriculum through investments in faculty, high level of student services, advanced software and technology costs, support funding for studio projects and travel, as well as financial aid opportunities. Graduates of the program will increase their earnings potential as they are able to participate in networking activities, learning through knowledgeable faculty, speakers, and visiting faculty who maintain significant research and industry connections.

MS in Architecture

\$875/semester program fee increase

The MS in Architecture is a research-based degree program focused on investigating new opportunities in energy performance and climate-responsive structures. Students in this program graduate with the skills necessary to develop careers in energy-efficiency building design and expertise in energy technologies. Students in this program tend to hold an undergraduate degree in Architecture or allied design fields, and may hold a professional degree (BArch or MArch). These students seek more expertise in energy systems, made possible through this program. The current program fee amount was established in 2006 and, since that time, the costs associated with offering this program have risen substantially. This request will enable appropriate support for these students while keeping the program well-placed within the overall market. Program fees will significantly enhance the quality of the student experience, providing improvements to the curriculum through investments in faculty, high level of student services, advanced software and technology costs, support funding for studio projects and travel, as well as financial aid opportunities.

MS Design in Industrial Design, Interior Architecture, Visual Communication Design

\$500/semester program fee increase

The MS in Design programs are research-based degree programs within the The Design School (TDS), focused on investigating new opportunities in all design disciplines. Students in these programs graduate with the skills necessary to develop careers in design-research areas. The students tend to hold an undergraduate degree in related design fields, and are seeking expertise to develop a research-related career

path within a creative profession. The current program fee amount was established in 2006 and, since that time, the costs associated with offering these programs have risen substantially. As a result, there is insufficient revenue to support the students in these programs properly. This request will enable appropriate support for these students while keeping the programs well-placed within the overall market. Program fees will significantly enhance the quality of the student experience through investments in higher levels of student services, advanced software and technology, research projects and conference travel, faculty, and increased financial aid.

Mary Lou Fulton Teachers College

Teacher Certificate (Online)

\$73/credit – new program fee

The online programs offered by Mary Lou Fulton Teachers College provide meaningful learning activities for students to put theory in practice – to apply what they learn to the context in which they want to work. Online courses challenge students to engage with the content, with their instructors, and with each other. High quality online programs require professional course design, frequent in-depth and personalized feedback to students on their work, and focused retention efforts to ensure students persist and complete the program. In particular, the Teachers College emphasis on student engagement in real-world problems and evidence-based practice necessitates an investment that supports quality learning design. The program fee would support investments in five main areas, including: personnel; program and course design and development; professional development; learning technologies and systems; and financial aid.

Sandra Day O'Connor College of Law

Master of Human Resources and Employment Law

\$725/credit hour – new program fee

The Master of Human Resources and Employment Law (MHREL) is a new degree program. This fee proposal will ensure that this new program can build from the strong foundation already in existence for the Master of Legal Studies program, from which the MHREL will branch off. Revenues from the fees will provide flexibility as the program deals with issues of scale. Revenues will benefit students in the program and beyond through funding for additional student services and technology staff, creating pipelines to post-graduation employment through career services relationships, accreditation with a national industry certification organization, and investments in continuing education curriculum and career services support to enhance student expertise and marketability after graduation.

There are few non-Juris Doctor graduate programs that train human resources professionals to understand the complex legal and regulatory framework of employment law. The program fee structure is in line with the competitive marketplace for a degree like this, and the fixed cost-per-credit caters to the established student population of working professionals that likely will be attending part-time. While there are not many competitors for this specific degree at this time, new market entrants are expected in the years to come. The law school believes that being among the first to offer this particular degree will enhance the University's reputation for innovation, and make ASU Law the preeminent brand for this type of degree. The proposed program fee structure will be attractive to students who want to earn this degree from an elite law school at a reasonable price, while also allowing ASU Law to compete with lower tier law schools that cost less to attend. In short, this proposal strikes a nice balance between prestige and value for students.

Master of Human Resources and Employment Law (Online)

\$658/credit hour – new program fee

The Master of Human Resources and Employment Law (MHRELO) is a new degree program. This fee proposal will ensure that this new program can build from the strong foundation already in existence for the Master of Legal Studies program, from which the MHRELO will branch off. Revenues from the fees will provide flexibility as the program deals with issues of scale. Revenues will benefit students in the program and beyond through funding for additional student services and technology staff, creating pipelines to post-graduation employment through career services relationships, accreditation with a national industry certification organization, and investments in continuing education curriculum and career services support to enhance student expertise and marketability after graduation.

There are few non-Juris Doctor graduate programs that train human resources professionals to understand the complex legal and regulatory framework of employment law. The program fee structure is in line with the competitive marketplace for a degree like this, and the fixed cost-per-credit caters to the established student population of working professionals that likely will be attending part-time. While there are not many competitors for this specific degree at this time, new market entrants are expected in the years to come. The law school believes that being among the first to offer this particular degree will enhance the University's reputation for innovation, and make ASU Law the preeminent brand for this type of degree. The proposed program fee structure will be attractive to students that want to earn this degree from an elite law school at a reasonable price, while also allowing ASU Law to compete with lower tier law schools that cost less to attend. In short, this proposal strikes a nice balance between prestige and value for students.

The College of Liberal Arts and Sciences

MA Women and Gender Studies (Online)

\$80/credit – new program fee

The first fully online M.A. degree in Women and Gender Studies offered in the nation, in partnership with Ms. Magazine, will provide students with professional training in the interdisciplinary field of women and gender studies, preparing them for divergent career paths that fit their professional aspirations and help further advance current placements. This innovative degree is like no other offered in the nation. It will provide advanced training to and broaden career opportunities for a more diverse range of students. The proposed program fee will help to support high quality instruction and ensure positive student outcomes. The fees will help to support instructional needs, a variety of applied content, technological innovations, course development and, as we continue to scale and grow the program, additional staffing to support student success.

Thunderbird School of Global Management

MA Global Affairs and Management

\$489/credit hour program fee increase

The MA in Global Affairs and Management (MAGAM) will be offered in Los Angeles, CA. This request for an increase in the fee is needed to accommodate an increased expense structure in the delivery of the program in Los Angeles. Increased expenditures include a higher service level to students (professional coaching, career management services, meals, etc.), travel costs for renowned faculty from Arizona campuses and across the globe to teach in LA, degree promotion and awareness in the local market, convocation for students in LA, and program staff/administration in LA.

MA Global Affairs and Management (Executive)

\$489/credit hour program fee increase

The MA in Global Affairs and Management (MAGAM) is being offered as an Executive program in Washington D.C. This request for a fee increase is needed to accommodate an increased expense structure in the delivery of the degree to an executive level student in Washington DC. Increased expenditures include a higher service level to students (professional coaching, career management services, meals, etc.), travel costs for renowned faculty from Arizona campuses and across the globe to teach in DC, degree promotion and awareness in the local market, convocation for students in DC, and program staff/administration in DC.

Watts College of Public Service and Community Solutions

MS Crime Analysis

\$100/credit hour – new program fee

The MS in Crime Analysis is an advanced degree program providing motivated students with knowledge, skills and abilities to assume positions of leadership and key management positions in the emerging field of crime analysis. This program will be offered both online and as a campus-based program. As one of the first graduate programs of its kind in the nation, this program will be at the forefront of providing a top-ranked education in crime analysis, as well as innovative research. The fee revenue will help to provide a quality experience through the expertise of faculty and working professionals who can convey both conceptual and pragmatic information to enrolled students. In addition to faculty expertise, the program fee will support course design, immersive simulation learning experiences, and access to software and other technological tools.

MA Policy Advocacy (Online)

\$100/credit hour – new program fee

The MA in Policy Advocacy will provide students with the expertise and knowledge required to navigate the legal, communication, political and policy landscapes of policy advocacy work. To provide a quality experience, the expertise of faculty and working professionals is needed to convey both conceptual and pragmatic information to students. This fee will support online course development and program delivery, student services, and technology to support the innovative curriculum.

W.P. Carey School of Business

Graduate Certificate in Marketing (Online)

\$375/credit – new program fee

The Graduate Certificate in Marketing focuses on enhancing students' understanding of marketing and customer experience management by offering a portfolio of courses focused on key relevant topics including digital marketing, creating digital experiences and excelling at customer experience management. This certificate will be valuable for individuals who have earned a four-year degree in business or outside of business, with at least some relevant work experience, who want to advance their understanding and skills related to marketing and customer experience management to further their careers. Students will benefit from an innovative online curriculum, engaging student experiences, and enhanced career services.

Graduate Certificate in Real Estate

\$375/credit – new program fee

The Graduate Certificate in Real Estate encompasses all aspects of the business of real estate that are not covered in related disciplines such as architecture, construction, design, and urban planning and has been requested frequently by students in those courses of study. This certificate is focused on providing this additional opportunity for existing ASU degree-seeking students. This certificate will provide graduate students from other programs a way to enhance and supplement the work students perform in their specific programs. In addition, this certificate will allow students the ability to expand their scope of knowledge and skills to become more attractive to employers in their specific fields.

Master of Accountancy

\$1,000/semester program fee increase

The Master of Accountancy (MACC) program prepares students to excel in highly competitive industries. The MACC delivers in-depth knowledge of advanced accounting challenges and equips students to provide specialized advisory services. Students in the program will benefit from a high level of career services, as nearly 100 percent of domestic graduates are employed within 90 days of graduation and successfully completes requirements for the CPA exam and licensure in Arizona and California. Substantial improvements will be made to this program for Fall 2021. The program will now have more and improved data analytics coverage, will include explicit preparation for the CPA Exam, and will allow students more flexibility in tailoring their coursework.

Master of Taxation

\$1,000/semester program fee increase

The Master of Taxation (MTax) program prepares students to excel in highly competitive industries. The MTax program equips students to provide tax and business advice and administer tax laws, as well as delivers in-depth knowledge of advanced accounting challenges related to taxation. Students in the program will benefit from a high level of career services, as nearly 100 percent of domestic graduates are employed within 90 days of graduation and successfully complete requirements for the CPA exam and licensure in Arizona and California. Substantial improvements will be made to this program for Fall 2021. The program will now have more and improved data analytics coverage, will include explicit preparation for the CPA Exam, and will allow students more flexibility in tailoring their coursework.

Other Fees

Sandra Day O'Connor College of Law

Master of Sports Law and Business Deposit Fee

\$500/deposit - new

The Sandra Day O'Connor College of Law JD program has a seat deposit and the requirement of a deposit has proven to be a success in securing enrollment and

enabling the program director to manage the curriculum delivery and program costs better. The deposit will be applied to the program fee for those students who are admitted and attend the program.

Student Services

Undergraduate Student Programs Fee

\$5/semester increase

Currently, undergraduate students pay \$30/semester to support a range of programming initiatives, clubs and organizations.

With the addition of hundreds of new clubs, sports clubs, events, and cultural celebrations, students in Undergraduate Student Government will use the incremental fee revenue to support the increased demand for student engagement programs. This includes funding to support large scale programming initiatives, cultural programming, student clubs and organizations, events, and activities.

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Arizona State University

Base Tuition and Mandatory Fees

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Arizona University System
 President's Recommended
 2021-2022
 Base Tuition and Mandatory Fees

Undergraduate

ASU (All Campuses) - Resident Undergraduate - All students except freshmen and sophomores in the Polytechnic School and New College

	TUITION	AFAT	STUDENT-INITIATED FEES ¹	TUITION + MANDATORY FEES	COLLEGE FEES
2020-21	\$10,710	\$108	\$520	\$11,338	\$0/\$210/\$770/\$1,050
2021-22	\$10,710	\$108	\$530	\$11,348	\$0/\$210/\$770/\$1,050
\$ Change	\$0	\$0	\$10	\$10	
% Change	0.0%			0.1%	

ASU - Resident Undergraduate - Freshman and sophomore students in the Polytechnic School and New College

	TUITION	AFAT	STUDENT-INITIATED FEES ¹	TUITION + MANDATORY FEES	COLLEGE FEES
2020-21	\$9,640	\$108	\$520	\$10,268	\$0/\$210/\$770/\$1,050
2021-22	\$9,640	\$108	\$530	\$10,278	\$0/\$210/\$770/\$1,050
\$ Change	\$0	\$0	\$10	\$10	
% Change	0.0%			0.1%	

ASU (All Campuses) - Nonresident Undergraduate - All domestic students except freshmen and sophomores in the Polytechnic School and New College

	TUITION	AFAT	STUDENT-INITIATED FEES ¹	TUITION + MANDATORY FEES	COLLEGE FEES
2020-21	\$28,800	\$108	\$520	\$29,428	\$0/\$360/\$1,320/\$1,800
2021-22	\$28,800	\$108	\$530	\$29,438	\$0/\$360/\$1,320/\$1,800
\$ Change	\$0	\$0	\$10	\$10	
% Change	0.0%			0.0%	

ASU - Nonresident Undergraduate - Freshman and sophomore students in the Polytechnic School and New College

	TUITION	AFAT	STUDENT-INITIATED FEES ¹	TUITION + MANDATORY FEES	COLLEGE FEES
2020-21	\$25,920	\$108	\$520	\$26,548	\$0/\$360/\$1,320/\$1,800
2021-22	\$25,920	\$108	\$530	\$26,558	\$0/\$360/\$1,320/\$1,800
\$ Change	\$0	\$0	\$10	\$10	
% Change	0.0%			0.0%	

ASU (All Campuses) - Undergraduate International - All domestic students except freshmen and sophomores in the Polytechnic School and New College

	TUITION	AFAT	STUDENT-INITIATED FEES ¹	TUITION + MANDATORY FEES	COLLEGE FEES
2020-21	\$31,200	\$108	\$520	\$31,828	\$0/\$360/\$1,320/\$1,800
2021-22	\$31,200	\$108	\$530	\$31,838	\$0/\$360/\$1,320/\$1,800
\$ Change	\$0	\$0	\$10	\$10	
% Change	0.0%			0.0%	

ASU - Undergraduate International - Freshman and sophomore students in the Polytechnic School and New College

	TUITION	AFAT	STUDENT-INITIATED FEES ¹	TUITION + MANDATORY FEES	COLLEGE FEES
2020-21	\$28,080	\$108	\$520	\$28,708	\$0/\$360/\$1,320/\$1,800
2021-22	\$28,080	\$108	\$530	\$28,718	\$0/\$360/\$1,320/\$1,800
\$ Change	\$0	\$0	\$10	\$10	
% Change	0.0%			0.0%	

Arizona University System
 President's Recommended
 2021-2022
 Base Tuition and Mandatory Fees

Undergraduate

ASU Colleges at Lake Havasu City - Resident Undergraduate

	TUITION	AFAT	STUDENT-INITIATED FEES ²	TUITION + MANDATORY FEES	COLLEGE FEES
2020-21	\$6,426	\$108	\$60	\$6,594	\$0/\$210/\$770/\$1,050
2021-22	\$6,426	\$108	\$70	\$6,604	\$0/\$210/\$770/\$1,050
\$ Change	\$0	\$0	\$10	\$10	
% Change	0.0%			0.2%	

ASU Colleges at Lake Havasu City - Nonresident Undergraduate

	TUITION	AFAT	STUDENT-INITIATED FEES ²	TUITION + MANDATORY FEES	COLLEGE FEES
2020-21	\$10,368	\$108	\$60	\$10,536	\$0/\$360/\$1,320/\$1,800
2021-22	\$10,368	\$108	\$70	\$10,546	\$0/\$360/\$1,320/\$1,800
\$ Change	\$0	\$0	\$10	\$10	
% Change	0.0%			0.1%	

ASU Rural Community College Based Programs³ - Undergraduate

	TUITION	AFAT	STUDENT-INITIATED FEES ²	TUITION + MANDATORY FEES	COLLEGE FEES
2020-21	\$6,426	\$108	\$60	\$6,594	\$0/\$210/\$770/\$1,050
2021-22	\$6,426	\$108	\$70	\$6,604	\$0/\$210/\$770/\$1,050
\$ Change	\$0	\$0	\$10	\$10	
% Change	0.0%			0.2%	

¹ FY22 Student-Initiated Fees consist of the following: Student Recreation Center fee of \$50; Student Programs Fee of \$70; Student Service Facility fee of \$150; Health & Wellness fee of \$110; and Student Athletics fee of \$150.

² ASU Colleges at Lake Havasu City and ASU Rural Community College Based Programs pay Student Programs Fee of \$70.

³ The Rural Community College Based Program rate pertains to community college locations based outside Maricopa, Pima, and Mohave counties. All undergraduate students are charged the same rate.

Arizona University System
 President's Recommended
 2021-2022
 Base Tuition and Mandatory Fees

Graduate

ASU (All Campuses) - Resident Graduate

	TUITION	GRADUATE STUDENT SUPPORT FEE	AFAT	STUDENT-INITIATED FEES ¹	TUITION + MANDATORY FEES
2020-21	\$11,720	\$250	\$108	\$530	\$12,608
2021-22	\$11,720	\$250	\$108	\$530	\$12,608
\$ Change	\$0	\$0	\$0	\$0	\$0
% Change	0.0%				0.0%

ASU (All Campuses) - Nonresident Graduate

	TUITION	GRADUATE STUDENT SUPPORT FEE	AFAT	STUDENT-INITIATED FEES ¹	TUITION + MANDATORY FEES
2020-21	\$31,400	\$250	\$108	\$530	\$32,288
2021-22	\$31,400	\$250	\$108	\$530	\$32,288
\$ Change	\$0	\$0	\$0	\$0	\$0
% Change	0.0%				0.0%

ASU (All Campuses) - Graduate International

	TUITION	GRADUATE STUDENT SUPPORT FEE	AFAT	STUDENT-INITIATED FEES ¹	TUITION + MANDATORY FEES
2020-21	\$33,600	\$250	\$108	\$530	\$34,488
2021-22	\$33,600	\$250	\$108	\$530	\$34,488
\$ Change	\$0	\$0	\$0	\$0	\$0
% Change	0.0%				0.0%

¹ FY22 Student-Initiated Fees consist of the following: Student Recreation Center fee of \$50; Student Programs fee of \$50; Graduate & Professional Student Association (GPSA) fee of \$20; Student Service Facility fee of \$150; Health & Wellness fee of \$110; and Student Athletics fee of \$150.

Arizona University System
 President's Recommended
 2021-22
 Base Tuition and Mandatory Fees

Online

ASU - Undergraduate¹

	TUITION PER CREDIT ³	COLLEGE FEE PER CREDIT
2020-21	\$541	\$20/\$40/\$60/\$120
2021-22	\$541	\$20/\$40/\$60/\$120
\$ Change	\$0	
% Change	0.0%	

ASU - Graduate²

	TUITION PER CREDIT ³
2020-21	\$543
2021-22	\$543
\$ Change	\$0
% Change	0.0%

¹ All online undergraduate students are charged a flat mandatory fee of \$108 for AFAT.

² All online graduate students are charged flat mandatory fees of \$108 for AFAT and \$100 for Student Technology.

³ Online base tuition for resident undergraduate students is capped at the resident undergraduate immersion tuition rate per semester.
 Online base tuition for resident graduate students is capped at the resident graduate immersion tuition rate per semester.
 Online base tuition for nonresident students is billed per credit hour with no cap.

Arizona State University

College Fees

Program Fees

Class Fees

Other Academic Fees

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Differential Tuition, Program Fees, Class Fees
 ARIZONA STATE UNIVERSITY

FEE TYPE	College/School/Program	Grad/ Undergrad	Upper/Lower Division	New or Increase	DATA INPUT			Incremental Increase	Incremental Increase per AY	Estimated Additional Revenue	Reference Page #
					Per Semester/Credit Hour						
					Student Enrollment	Current Fee	Proposed				
TOTAL										\$4,577,900	
UNDERGRADUATE - COLLEGE FEE										\$316,000	
Undergraduate College Fee - Herberger Institute	All	Undergraduate		Increase	1,000	\$385	\$525	\$140	\$280	\$316,000	25
GRADUATE - DIFFERENTIAL TUITION											
GRADUATE - PROGRAM FEE										\$3,636,900	
College of Health Solutions	Doctor of Audiology	Graduate		Increase	50	\$1,200	\$2,000	\$800	\$1,600	\$80,000	27
College of Health Solutions	MS Communication Disorders	Graduate		Increase	90	\$800	\$2,500	\$1,700	\$3,400	\$306,000	29
College of Health Solutions	MS Nutritional Science (Dietetics) (Online)	Graduate		Increase	810	\$180	\$225	\$45	\$45	\$36,500	31
College of Health Solutions	MS Strength and Conditioning	Graduate		New	40	\$0	\$2,500	\$2,500	\$5,000	\$200,000	33
Edson College of Nursing and Health Innovation	MS Regulatory Science	Graduate		New	25	\$0	\$2,000	\$2,000	\$4,000	\$100,000	35
Herberger Institute for Design and the Arts	M of Architecture; Visual Communication Design; Industrial Design; Interior Architecture; Landscape Architecture; Urban Design	Graduate		Increase	250	\$2,425	\$3,000	\$575	\$1,150	\$287,500	37
Herberger Institute for Design and the Arts	MS of Architecture	Graduate		Increase	7	\$1,625	\$2,500	\$875	\$1,750	\$12,300	39
Herberger Institute for Design and the Arts	MS Design (Industrial Design; Interior Architecture; Visual Communication Design)	Graduate		Increase	26	\$500	\$1,000	\$500	\$1,000	\$26,000	41
Mary Lou Fulton Teachers College	Teacher Certificate (Online)	Graduate		New	3,450	\$0	\$73	\$73	\$73	\$251,900	43
Sandra Day O'Connor College of Law	M Human Resources and Employment Law	Graduate		New	240	\$0	\$725	\$725	\$725	\$174,000	45
Sandra Day O'Connor College of Law	M Human Resources and Employment Law (Online)	Graduate		New	1,260	\$0	\$658	\$658	\$658	\$829,100	47
The College of Liberal Arts and Sciences	MA Women and Gender Studies (Online)	Graduate		New	2,250	\$0	\$80	\$80	\$80	\$180,000	49
Thunderbird School of Global Management	MA Global Affairs and Management	Graduate		Increase	690	\$1,468	\$1,957	\$489	\$489	\$337,400	51
Thunderbird School of Global Management	MA Global Affairs and Management (Executive)	Graduate		Increase	660	\$1,468	\$1,957	\$489	\$489	\$322,700	53
Watts College of Public Service & Community Solutions	MS Crime Analysis	Graduate		New	450	\$0	\$100	\$100	\$100	\$45,000	55
Watts College of Public Service & Community Solutions	MA Policy Advocacy (Online)	Graduate		New	360	\$0	\$100	\$100	\$100	\$36,000	57
WP Carey School of Business	Marketing Certificate (Online)	Graduate		New	300	\$0	\$375	\$375	\$375	\$112,500	59
WP Carey School of Business	Real Estate Certificate	Graduate		New	80	\$0	\$375	\$375	\$375	\$30,000	61
WP Carey School of Business	M Accountancy	Graduate		Increase	100	\$7,500	\$8,500	\$1,000	\$2,000	\$200,000	63
WP Carey School of Business	M Taxation	Graduate		Increase	35	\$7,500	\$8,500	\$1,000	\$2,000	\$70,000	65
CLASS FEES											
OTHER FEES										\$625,000	
Sandra Day O'Connor College of Law	M Sports Law and Business Deposit Fee	Graduate		New	50	\$0	\$500	\$500	\$500	\$25,000	67
Student Services	Undergraduate Student Programs	Undergraduate		Increase	60,000	\$30	\$35	\$5	\$10	\$600,000	68

Notes:
 Student Enrollment reflects headcount for fees to be charged per semester and student credit hours for fees to be charged per credit hour.
 Undergraduate College Fee - Herberger Institute: fee amounts listed reflect the resident rate only. The change proposed for the non-resident rate is to increase from \$660 to \$900 per semester. The estimated additional revenue amount listed includes resident and non-resident adjustments.

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#\ 008- FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: Herberger Institute for Design and the Arts
 Department: ALL Program: Undergraduate Campus Immersion

Both
 Graduate
 Undergraduate
 Both
 Choose One Option

Resident: \$385 /semester \$525 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Non-Resident: \$660 /semester \$900 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

College Fee History:		Most Recent Date & Change to fee (Date/Amount)	
Resident:			
Date Fee Established	Fall	2019	and original amount <u>\$385</u> Fall 2019
Non-Resident:			
Date Fee Established	Fall	2019	and original amount <u>\$660</u> Fall 2019

Other Applicable Fees in College/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the college with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the college with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The Herberger Institute seeks to move from Undergraduate College Fee level 3 to level 4 for all new undergraduate campus immersion students as we grow from one location to four in the next two years while expanding and upgrading our programs, enrollments, and facilities to meet the need of the 21st century creative learner. The proposed fee increase will be used to maintain and upgrade facilities, support and expand creative technologies, grow our creative career services and experiential learning opportunities, and provide a dynamic student experience alongside intentional student support resources. The Herberger Institute runs lean and even with the fee increase will still continue to be under the costs of many of our closest competitors and aspirational peers.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

Design and arts education involves specialized instruction and is more expensive than many other types of programs — classes are, on average, smaller; require intensive specialization; and they are equipment, technology, and space intensive. The Institute has grown rapidly in the last several years and will expand to three additional campuses, multiple new degrees, and needs to update an aging physical plant, technology, and studios. Additionally, the Herberger Institute continues to prioritize the creative futures of its diverse student body, over half of whom come from economically disadvantaged backgrounds. We therefore need to invest in more equipment and materials, scholarships, grant opportunities, and student worker/staffing positions to advance equitable educational attainments and increase persistence while shortening time to graduation. The fee revenue will cover a portion of the costs to offer the programs.

Student Consultation (Please describe the method and outcomes of student consultation)

Over 5,000 undergraduate immersion students were emailed a briefing document and survey requesting feedback on the proposed increase. Units additionally sent the survey link to their specific populations with information on how the proposed increase would support their school and programs directly. The response rate to the survey was slightly over 9.5%. Multiple focus group interviews also were held with interested students as well as all student leaders. Focus group populations represented all the different schools across the institute, but not all specialized disciplinary perspectives. As one would expect during a pandemic and linked economic downturn, 67% did not support the fee increase, with many students expressing concern with the timing of the request. Focus groups allowed more nuanced feedback. No matter whether students supported increases or not, they all heavily prioritized fee use specifically for student support programs and mechanisms. They ranked facilities and staffing as their secondary priority, with creative careers and experiential learning as the third most important. Almost all focus groups and many survey responses expressed concern with current aging facilities and a desire for more equipment, equity materials funds and capstone project supports. While fee increases are difficult in the abstract for students to support; it is clear from conversations about the priorities that they outlined that a fee increase is necessary to support the needs they identified.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
University of Michigan – Ann Arbor	Architecture	\$ 15,734	\$ 52,052	
University of California, Berkeley	Art	14,312.00	44,066.00	
University of Arizona	Fine Arts	12,696.00	36,723.00	
U of Colorado, Boulder	Music	12,826.00	38,670.00	
Northern Arizona University		11,896.00	26,642.00	
University of Utah	Arts	9,425.00	30,894.00	
University of Texas, Austin	Fine Arts/Moody College	11,336.00	40,158.00	
ASU	HIDA Undergraduates	12,388.00	31,228.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$1,050 (resident) \$1,800 (non-resident)
Number of Students	#	\$ 1,000
Total Revenue	=	\$1,185,000

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 201,450.00
Administrative Service Charge	\$	\$ 100,725.00
Personal Services (Salaries & ERE)	\$	\$ 384,882.83
Equipment & Facilities	\$	\$ 105,175.00
Other Operating Expenditures	\$	\$ 392,767.17
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 1,185,000.00



PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: College of Health Solutions

Department: _____ Program: Doctor of Audiology

Both Graduate Undergraduate

Resident: \$ 1,200 /semester \$ 2,000 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Non-Resident: \$ 1,200 /semester \$ 2,000 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Program Fee History:		Most Recent Date & Change to fee (Date/Amount)
Resident:		
Date Fee Established	<u>Fall 2010</u> and original amount <u>\$ 600</u>	<u>Fall 2015 \$ 1,200</u>
		Most Recent Date & Change to fee (Date/Amount)
Non-Resident:		
Date Fee Established	<u>Fall 2010</u> and original amount <u>\$ 600</u>	<u>Fall 2015 \$ 1,200</u>

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The Doctor of Audiology (AuD) degree is the terminal degree required for certification and the practice of Audiology by the American Speech-Language-Hearing Association (ASHA). This program is ranked among the top 25 accredited programs in the U.S. The primary benefit of this fee is greater depth and breadth of clinical training and subsequent ability to gain employment in more competitive jobs upon graduation.

Audiologists diagnose and treat hearing, balance, and other auditory disorders in patients across the age spectrum. Certification requires a Clinical Doctorate degree and 1,820 clinic hours supervised by a licensed Audiologist with a Certificate in Clinical Competence from ASHA. Due to the extensive clinical training required, AuD students in this program complete a full year clinical rotation in a hospital, doctor's office or other clinical setting in year four of the program. This requires an extensive network of clinical externships in Arizona and across the U.S. to fulfill these requirements.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The Doctor of Audiology (AuD) degree has substantial operating costs which includes specialized equipment, significant clinical supervision costs, a required low faculty-student ratio, and high proportion of doctoral-prepared faculty to teach and supervise students. Many of these costs are being addressed with the current fee, however additional resources are needed in order to meet accreditation standards and the ability to train students properly in preparation for practicing as a licensed Audiologist. Clinical rotations are completed both on campus in years one through three and at off-site locations in year four of the program. And, access to highly specialized, and often costly, medical equipment, technology and clinical tracking software is needed to educate and train students properly.

The incremental revenue would be used for specialized lab equipment that is not currently in the clinic but is needed to enhance the student experience; adding simulation-based learning opportunities to the program through specialized equipment and/or simulated patient scenarios to train in competency areas that are not well represented in the clinical population (e.g., rare audiologic diseases); software to track clinical hours and competencies; stipends for licensed Audiologists supervising students in unpaid, off-site externship locations; and, ability to hire additional clinical supervisors in the on-site Hearing Clinic to maintain the 1:1 student to supervisor ratio.

17% of the fee revenue will be set aside for financial aid. The fee revenue covers a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

An online survey was conducted of the current Doctor of Audiology students (n=57) to solicit feedback on the proposed program fee increase. Responses were received from all students, and the majority of students were supportive of a \$2,000 or higher program fee per semester.

-68% were either neutral, agreed or strongly agreed to increasing the fee if it enhanced the quality of the training lab experience (e.g., improved and/or additional equipment).

-68% were either neutral, agreed or strongly agreed to increasing the fee if it increased simulation opportunities (e.g., additional simulation equipment, standardized patients, more simulation opportunities).

-79% were either neutral, agreed or strongly agreed to increasing the fee if the funds were invested directly back into enhancing the academic training experiences (e.g., increased didactic instructional opportunities such as elective opportunities).

-82% were either neutral, agreed or strongly agreed to increasing the fee if the funds advanced the development of clinical training experiences (e.g., increased SuperClinic opportunities and specialty clinics).

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	Doctor of Audiology	\$ 16,608	\$ 36,288	
Indiana University - Bloomington	Doctor of Audiology	10,625.00	33,333.00	
Ohio State University - Columbus	Doctor of Audiology	12,425.00	37,141.00	
University of Arizona	Doctor of Audiology	14,772.00	34,899.00	
University of Iowa	Doctor of Audiology	13,538.00	32,485.00	
University of Maryland - College Park	Doctor of Audiology	14,794.00	30,886.00	
University of Minnesota - Twin Cities	Doctor of Audiology	28,764.00	44,046.00	
University of Texas - Austin	Doctor of Audiology	19,922.00	37,632.00	
University of Illinois - Urbana Champaign	Doctor of Audiology	16,072.00	31,360.00	
University of Connecticut	Doctor of Audiology	19,664.00	41,576.00	
University of Wisconsin - Madison	Doctor of Audiology	12,196.00	25,523.00	
Vanderbilt University	Doctor of Audiology (#1 ranked program)	42,025.00	42,025.00	
Northwestern University	Doctor of Audiology	56,612.00	56,612.00	
University of Pittsburgh	Doctor of Audiology	28,528.00	33,886.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 4,000.00
Number of Students	#	\$ 50
Total Revenue	=	\$ 200,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 34,000.00
Administrative Service Charge	\$	\$ 13,000.00
Instructional & Clinical Supervision	\$	\$ 90,000.00
Advising and Support Staff	\$	\$ 20,000.00
Accreditation Costs (annual fee, site visit fee, etc	\$	\$ 3,500.00
Other operating (equip., lab materials, software,	\$	\$ 39,500.00
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 200,000.00



PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: College of Health Solutions

Department: _____ Program: MS Communication Disorders

Both Graduate Undergraduate

Resident: \$ 800 /semester \$ 2,500 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Non-Resident: \$ 800 /semester \$ 2,500 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Program Fee History:		Most Recent Date & Change to fee (Date/Amount)
Resident:		
Date Fee Established	<u>Fall 2010</u> and original amount <u>\$ 600</u>	<u>Fall 2015 \$ 800</u>
		Most Recent Date & Change to fee (Date/Amount)
Non-Resident:		
Date Fee Established	<u>Fall 2010</u> and original amount <u>\$ 600</u>	<u>Fall 2015 \$ 800</u>

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The master's degree in Communications Disorders is the terminal degree required for certification and the practice of speech-language pathologists (SLP) by the American Speech-Language-Hearing Association (ASHA). The ASU program is ranked among the top 25 accredited programs in the U.S. The primary benefit of this fee is greater depth and breadth of clinical training and subsequent ability to gain employment in more competitive jobs upon graduation.

SLP students train to work with adults and children who have a wide variety of speech, language, swallowing and voice disorders. Certification requires 400 direct-patient clinical hours that must be supervised by a licensed and certified SLP and each student must demonstrate competence in assessment and treatment across nine disorder areas. Additionally, ASU offers one of the nation's few bilingual SLP programs. Features of the program that will be improved by the additional revenue generated include:
 -Clinical rotations completed both on campus and at paid off-site locations by licensed SLPs who specialize in different disorders. This requires access to a wide and diverse range of clinicians.
 -Access to highly specialized, and often costly, medical equipment, technology and clinical tracking software needed to educate and train students properly. In particular, students will benefit from access to simulation equipment and experiences in order to reduce patient risk, such as treating children in a NICU setting.
 -Interpreters and speech-language pathologists that specialize in multilingual and multicultural assessment and intervention so that all students get training in working with populations that do not speak English as a native language.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The MS in Communications Disorders has substantial operating costs which includes specialized equipment, significant clinical supervision costs, a required low faculty-student ratio, and high proportion of doctoral-prepared faculty to teach and supervise students. Some of these costs are funded by the current fee, however additional resources are needed to meet accreditation standards and to train students in all nine specializations required by ASHA for licensure.

The incremental revenue would be used for:
 -Specialized lab equipment that is not currently in the clinic but is needed to enhance the student experience. Examples include simulation equipment and other specialized equipment to train students in diagnostic procedures that involve visualization of the vocal folds, swallowing process, and production of speech
 -Additional diagnostic tests and language sampling software for students to use during labs and simulation
 -Software to track clinical hours and competencies
 -Stipends for licensed SLPs supervising students in unpaid, off-site externship locations
 -Onboarding compliance programs
 -Support for off-site supervisors and students in onboarding and ongoing assessment of the off-site location
 -Clinical training opportunities that require a 1:1 or 1:2 faculty-to-student ratio

17% of the fee revenue will be set aside for financial aid. The fee revenue covers a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

An online survey was conducted of the current Communications Disorders master's students and Speech and Hearing Science undergraduate students, the target population most likely to enter this program. A total of 113 students responded to the survey: 60 undergraduate students and 53 master's students.

-87% were either neutral, supportive or very supportive of increasing the fee if it increased the quality of the in-house clinical training experience (e.g., improved and/or additional equipment)

-73% were either neutral, supportive or very supportive of increasing the fee if it increased simulation opportunities beyond the current Simucase computer interactive opportunities (e.g., standardized patients, more IPE simulation with other medical professionals, advanced technology simulations such as VR).

-81% were either neutral, supportive or very supportive of increasing the fee if the funds were invested directly back into the enhancement of academic training experiences (e.g., increased didactic instructional opportunities such as elective opportunities)

-88% were either neutral, supportive or very supportive of increasing the fee if the funds advanced the development of clinical training experiences (e.g., developing joint appointments between ASU and specialty clinics in settings such as Phoenix Children's Hospital, Mayo, Banner, etc so that these clinics could become a regular rotation rather than an applied internship placement for only one accepted student)

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	MS Communications Disorders	\$ 17,608	\$ 37,288	
Indiana University - Bloomington	MA Speech Language Pathology	10,635.00	33,333.00	
Ohio State University - Columbus	MA Speech Language Pathology	12,425.00	37,141.00	
Pennsylvania State University	MS Communication Sciences and Disorders	22,994.00	38,728.00	
University of Arizona	MS Speech Language Pathology	14,272.00	34,399.00	
University of Illinois - Urbana-Champaign	MA Speech and Hearing Science: Clinical	16,072.00	31,360.00	
University of Iowa	MA Speech Language Pathology	13,538.00	32,485.00	
University of Maryland - College Park	MA Speech Language Pathology	14,794.00	30,886.00	
University of Minnesota - Twin Cities	MA Speech Language Pathology	28,764.00	44,046.00	
Northern Arizona University	MS Speech Language Pathology	11,726.00	26,954.00	
University of Wisconsin - Madison	MS Speech Language Pathology	12,196.00	25,523.00	
Florida State Univeristy	MS Communication Sciences and Disorders	11,554.00	26,707.00	
University of Pittsburgh	MA/MS Speech-Language Pathology	28,528.00	33,886.00	
Michigan State University	MA Communication Sciences and Disorders	18,901.00	37,099.00	
University of Connecticut	MS Speech Language Pathology	19,664.00	41,576.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 5,000.00
Number of Students	#	\$ 90
Total Revenue	=	\$ 450,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 76,500.00
Administrative Service Charge	\$	\$ 29,260.00
Instructional & Clinical Supervision	\$	\$ 194,349.00
Advising and Support Staff	\$	\$ 49,258.00
Accreditation Costs	\$	\$ 4,275.00
Other operating (equipment, software, clinical pl:	\$	\$ 96,358.00
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 450,000.00



PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: College of Health Solutions
Department: _____ Program: MS Nutritional Science (Dietetics) (Online)

Both Graduate Undergraduate

Resident: \$ 180 /credit \$ 225 /credit Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Non-Resident: \$ 180 /credit \$ 225 /credit Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Program Fee History:				Most Recent Date & Change to fee (Date/Amount)
Resident:				
Date Fee Established	Fall	2016	and original amount <u>\$ 180</u>	Fall _____
Non-Resident:				
Date Fee Established	Fall	2016	and original amount <u>\$ 180</u>	Fall _____

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

Although not currently required to become a Registered Dietitian (RD), the Academy of Nutrition and Dietetics (AND) will change the minimum education requirement to a graduate degree, starting in 2024. Current RDs elect to enroll in the Nutritional Science (Dietetics) master's degree to increase their lifetime earning potential, while simultaneously aligning their academic credentials with the future educational standards.

Students in this program take intensive courses that enhance their existing skills in project management, interpretation of research literature, critical inquiry, and problem solving. This non-thesis program requires students to complete a six credit hour applied project. The purpose of the fee is to maintain a high-quality educational experience for this fully online program by utilizing cutting edge curriculum design and technology, hiring high quality faculty, and providing support through academic advising. The increase in program fee will allow for additional faculty support for the applied project as well as for guest lecturers who are experts in the field to enrich the student learning experience.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The cost of delivering this program has increased due to the need for additional specialized faculty to provide instruction and mentoring for applied projects and for additional academic support staff to support growing enrollments. High quality curriculum delivery that is online will enhance the learning experience for the student. The ability to utilize new, emerging online technologies will keep the program at the cutting edge of education and innovation, while the applied project experience will promote greater understanding of the relevance of nutrition in the healthcare system. Some of these costs are funded with the current fee revenue, however additional resources are needed to enrich the student learning experience as described above.

17% of the fee revenue will be set aside for financial aid. The fee revenue covers a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

- An online survey was conducted of the current Dietetic master's students. A total of 70 students responded to the survey.
 - 64% were either neutral, supportive or very supportive of increasing the fee if it improved the quality of instruction (e.g., improved course design, and increased use of technology tools embedded in classes).
 - 60% were either neutral, supportive or very supportive of increasing the fee if the funds were invested directly back into the college to enhance the student experience.
 - 84% would remain in the program if a higher fee was implemented.
 - More students weighed the reputation of the college/university higher than the program cost when considering graduate online Dietetic programs.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	MS Nutritional Science, Dietetics (Online only)			\$ 14,032
University of Arizona	Applied Nutrition (Online only)			12,306.00
University of Wisconsin - Madison	MS Clinical Nutrition (Online only)			14,675.00
North Carolina University	Master of Nutrition (Online only, cost is residency based)	8,314.00	23,596.00	
University of Georgia	MS Foods and Nutrition (Online only)			13,710.00
Stony Brook University	MS Nutrition (Online only, cost is residency based)	11,573.00	13,887.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 2,025.00
Number of Students	#	\$ 90
Total Revenue	=	\$ 182,250.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 30,982.50
Administrative Service Charge	\$	
Instructional Personnel	\$	\$ 77,356.00
Advising and Support Staff	\$	\$ 59,852.00
Other operating costs (e.g., technology, course €	\$	\$ 14,059.50
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 182,250.00



PROGRAM FEE REQUEST - NEW

Rev 2-19-18

University: Arizona State University College/School: College of Health Solutions
 Department: _____ Program: MS Strength and Conditioning

Both Graduate Undergraduate

Resident: \$ 2,500 /semester Effective Date: Fall 2021
 Proposed Fee (this field you may enter other option just by typing it in box)

Non-Resident: \$ 2,500 /semester Effective Date: Fall 2021
 Proposed Fee (this field you may enter other option just by typing it in box)

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The Master of Science in Strength and Conditioning will enable ASU to be recognized and ranked nationally as the standard for education in the strength and conditioning field. Optimizing human health and performance for athletic competitors and occupational athletes is often overlooked in the broader health community, and the ability to work with these individuals requires specialized knowledge and skills related to these specific populations. The National Strength and Conditioning Association (NSCA) will begin accrediting programs for strength and conditioning in Spring 2022. This degree program has been designed to meet the requirements of the proposed accreditation standards and will be eligible for early participation in the accreditation process, allowing ASU to be one of the pioneers in this field.

Program fees will be used to pay for specialized faculty, specialized equipment, advising and support staff, and the cost for maintaining accreditation of the program.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The operating costs to deliver this program include specialized faculty to provide curricular content, specialized equipment needed to train students properly in strength and conditioning techniques, and advising and support staff to enhance student success. Additionally, the program fee will support the cost for accreditation of the program from the National Strength and Conditioning Association when they begin accrediting programs in Spring 2022.

NSCA accreditation requirements include a dedicated Program Director, Field Experience Coordinator, CSCS certified Strength and Conditioning Faculty and Field Experience Site Supervisor, support staff, access to necessary equipment and technology, and extensive field experience requirements. Students must obtain a minimum of 300 contact hours in multiple categories (sport, gender, age, etc.), have at least two different site supervisors, and must incorporate at least one of the eleven key areas identified by NSCA (e.g., flexibility training, Olympic-style lifting, plyometric training, etc.).

The fee revenue covers a portion of the costs to offer the program. 17% of the fee revenue will be set aside for financial aid.

Student Consultation (Please describe the method and outcomes of student consultation)

An online survey was conducted of the current Exercise and Wellness master's students and Sports Science and Performance Programming undergraduate students, the target population most likely to enter this program. A total of 85 students responded to the survey: 74 undergraduate students and 11 master's students.

- 96% were either neutral, supportive or very supportive of a program fee if it helped hire faculty with specialization and experience in strength and conditioning.
- 96% were either neutral, supportive or very supportive of a program fee if it improved the quality of instruction (e.g., increased use of technology tools embedded in classes).
- 96% were either neutral, supportive or very supportive of a program fee if it enhanced access to advising and consultation on scholarships, loans, and other sources of financial support.
- 96% were either neutral, supportive or very supportive of a program fee if the funds were invested directly back into the program to enhance the student experience.
- 99% were either neutral, supportive or very supportive of a program fee if more advanced equipment and technology in the labs are available in the program (i.e., keeping equipment current with that utilized in the field of strength and conditioning).
- 98% were either neutral, supportive or very supportive of a program fee if the funds were used to support accreditation requirements by NSCA.
- 100% agreed a program fee of at least \$2,500 per semester is appropriate to support this program, with 46% selecting a higher fee of \$3,000-\$5,000 per semester.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	MS Strength and Conditioning	\$ 17,608	\$ 37,288	
Indiana University Bloomington	MS Kinesiology	10,625.00	33,333.00	
Michigan State University	MS Kinesiology, Strength and Conditioning	19,495.00	37,693.00	
Florida State University	MS Exercise Physiology, Sports Sciences	11,554.00	26,707.00	
Ohio State University – Columbus	MS Sport Coaching	12,425.00	37,141.00	
Pennsylvania State University	MS Kinesiology	22,994.00	38,728.00	
University of Connecticut	MS Exercise Science	19,664.00	41,576.00	
University of Illinois – Urbana-Champaign	MS Kinesiology	16,072.00	31,360.00	
University of Iowa	MS Health and Human Physiology	11,468.00	30,415.00	
Univ of Maryland – College Park	MA Kinesiology	16,982.00	29,780.00	
Univ of Minnesota – Twin Cities	MEd Sport and Exercise Science	19,254.00	28,878.00	
Northern Arizona University	MS Athletic Training	13,726.00	28,954.00	
University of Wisconsin - Madison	MS Kinesiology	12,196.00	25,523.00	
University of Colorado - Colorado Spring	MS Sports Medicine, Strength and Conditioning	13,206.00	23,052.00	
University of Florida - Gainesville	MS Applied Physiology & Kinesiology, Human Performance	12,740.00	30,134.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee	\$	\$ 5,000.00
Number of Students	#	\$ 40
Total Revenue	=	\$ 200,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 34,000.00
Administrative Service Charge	\$	\$ 13,005.00
Instructional Personnel	\$	\$ 84,657.00
Advising and Support Staff	\$	\$ 45,016.00
Accreditation Annual Fee and Associated Costs	\$	\$ 3,500.00
Other Operating Costs (equip.,supplies,site sup	\$	\$ 19,822.00
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 200,000.00



PROGRAM FEE REQUEST - NEW

University: Arizona State University

College/School: Edson College of Nursing and Health Innovation

Department: _____

Program: MS Regulatory Science

Both Graduate Undergraduate

Resident: \$ 2,000 /semester Effective Date: Fall 2021
Proposed Fee (this field you may enter other option just by typing it in box)

Non-Resident: \$ 2,000 /semester Effective Date: Fall 2021
Proposed Fee (this field you may enter other option just by typing it in box)

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The MS in Regulatory Science program prepares students to achieve high level positions within the food and drug industry. This program requires national and international subject matter experts who are active in the industry and who bring specific expertise to the program and courses they teach. Preparation for work in these fields also requires exposure to specialized simulation and professional certification software. The program fee will enable smaller student to faculty ratios to facilitate student success and meet accreditation requirements.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The fee will support hiring of faculty who are active in the industry and are content experts in regulatory science and food safety, software costs, and accreditation costs. This fee amount is consistent with the MS in Clinical Research Management, with which Regulatory Science shares courses. The new fee will apply only to new students. 17% of the fee revenue will be set aside for financial aid and the fee will cover a portion of the costs to support offering the degree program.

Student Consultation (Please describe the method and outcomes of student consultation)

Current Regulatory Science students (n=13) were queried by email for their feedback on the proposed program fee and the intended purposes. Sixty-two percent responded, of which 50% said that they would support the fee, 30% said that they would not support the fee, and 20% said they would support the fee for some courses. Students were supportive of the fee as long as they were provided faculty who were content experts, active in the industry, and accessible to students for questions and support. The students also supported the fee in order to have smaller course section sizes to facilitate individual communication and access to faculty teaching the courses.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
ASU	MS Regulatory Science	\$ 16,608	\$ 36,288	\$ 15,928
Johns Hopkins Univ	MS Regulatory Science	46,750.00	46,750.00	46,750.00
Michigan State Univ	MS Food Safety			25,290.00
USC	MS Regulatory Science	70,560.00	70,560.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee	\$	\$ 4,000.00
Number of Students	#	\$ 25
Total Revenue	=	\$ 100,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 17,000.00
Administrative Service Charge	\$	\$ 6,500.00
Software	\$	\$ 1,500.00
Accreditation	\$	\$ 2,500.00
Faculty	\$	\$ 72,500.00
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 100,000.00



PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: Herberger Institute for Design and the Arts
 Department: The Design School (TDS) Program: M.Arch, M.IndusDes, M.Inter Arch, M.Landsc Arch, M.Vis C
 Both Graduate Undergraduate

Resident: \$ 2,425 /semester \$ 3,000 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Non-Resident: \$ 2,425 /semester \$ 3,000 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Program Fee History:		Most Recent Date & Change to fee (Date/Amount)	
Resident:			
Date Fee Established	<u>Fall</u> <u>2004</u>	and original amount	<u>\$ 1,125</u> <u>Fall</u> <u>2011</u> <u>\$ 2,425</u>
Non-Resident:			
Date Fee Established	<u>Fall</u> <u>2004</u>	and original amount	<u>\$ 1,125</u> <u>Fall</u> <u>2011</u> <u>\$ 2,425</u>

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The M of Architecture, M of Industrial Design, M of Interior Architecture, M of Landscape Architecture, M of Visual Communication Design, and M of Urban Design degrees are professionally-based design degrees in which students work to develop and refine their creative skills to obtain upper-level positions within the creative industries. The Master of Architecture program is a professionally-accredited program that prepares students for their eventual licensure as architects. The current program fee amount was established in 2011 and, since that time, the costs associated with offering these programs have risen substantially. The Design School now serves a large graduate cohort with inadequate revenues to cover the 2020 costs of offering such high quality programs. This request will enable appropriate support for these students while keeping the programs well-placed within the overall market. Program fees will significantly enhance the quality of the student experience, providing improvements to the curriculum through investments in faculty, high level of student services, advanced software and technology costs, support funding for studio projects and travel, as well as financial aid opportunities. Graduates of the program will increase their earnings potential as they are able to participate in networking activities, learning through knowledgeable faculty, speakers, and visiting faculty who maintain significant research and industry connections.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

Increased program fee revenues will directly benefit students through investments in specialized faculty, including visiting faculty and industry professionals as guest speakers; access to updated prototyping and computing technologies (hardware and software) allowing students to explore physical iterations of products associated with their studio-based projects; ongoing development of The Design School facilities, classrooms, and collaborative tools to keep students engaged in physical and virtual campuses, providing new opportunities for connection and partnerships with students, faculty, and professional networks; graduate advising; increased student travel opportunities, visiting both domestic and international locations as part of the learning experience; promoting the program in publications, professional conferences, and community engagement efforts; student services in areas including student recruitment, admissions, registration, student and course assessments, and exit surveys; and increased financial aid. The requested fee would apply to all new students in these programs, effective Fall 2020.

The fee revenue covers a portion of the costs to offer these programs. 17% of the fee revenue will be set aside for financial aid.

Student Consultation (Please describe the method and outcomes of student consultation)

The Design School (TDS) sought input from currently enrolled students as well as from a select group of fourth-year undergraduate students—potential recruits to the master program. TDS initially invited students to participate in focus groups as a means to collect feedback, however none opted to participate. As an alternate means to gather input, a survey was distributed to a list of 60 selected students via email on 11/17/20 by the Associate Director for Academic Affairs. On 11/24 the survey closed, with a 13.3% response rate (8 of 60 students). More students supported the use of the fees for financial aid assistance than for most other categories (scholarships, professional development, speakers and visiting professionals, targeted workshops, new tech/facility updates). Respondents responded in the following percentages to the question: "I believe proposed fees could improve student educational experiences if they were used to support:" Scholarships (50%); Professional Development (conference/research support) (25%); Guest speakers & Visiting Professors (0%); Targeted Workshops (8.3%); New Technology/ Facilities updates (41.7%); Other: (16.7%). Students also were asked to respond to the following: "I support the proposed program fee for uses identified above:" Strongly Agree (25%); Agree (25%); Neither agree nor disagree (12.5%); Disagree (0%); Strongly Disagree (37.5%). Four students provided open-ended comments, all noting concerns about current fees. With limited access to facilities and no travel options available, they believe their existing fees are not being put to proper use. They did note, however, that given the redistribution of fees as noted, the allocation feels appropriately flexible for times such as these.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	Master of Architecture, Master of Industrial Design, Master of Interior Architecture, Master of Landscape Architecture, Master of Visual Communication Design	\$ 18,608	\$ 30,432	
University of Arizona	Master of Architecture, MLA	16,272.00	36,399.00	
University of Illinois—Urbana-Champs	MLA, MArch, MFA Graphic Design, MFA Industrial Design	18,742.00	34,030.00	
Indiana University—Bloomington	MArch	17,000.00	37,000.00	
Rutgers University, New Brunswick	MLA	23,884.00	35,044.00	
University of Texas—Austin	Master of Architecture, MFA Design	12,478.00	23,302.00	
University of California—Los Angeles	Master of Architecture	17,486.00	32,588.00	
University of California, Berkeley	MArch, MLA	27,368.00	39,614.00	
University of Michigan—Ann Arbor	Master of Architecture, Master of Design	32,402.00	49,351.00	
Pennsylvania State University—University Park	MArch	22,994.00	38,728.00	
Ohio State University—Columbus	Master of Architecture, Master of Interior Design	12,425.00	36,009.00	
Florida State University	MFA Interior Architecture	11,554.00	26,707.00	
University of Washington—Seattle	Master of Architecture	19,884.00	34,279.00	
Art Center College of Design	Master of Graphic Design, Master of Industrial Design	48,380.00	48,380.00	
Savannah College of Art and Design	Master of Architecture, MFA Graphic Design, MFA Industrial Design, MFA Interior Design	38,475.00	38,475.00	38,475.00

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 6,000.00
Number of Students	#	\$ 250
Total Revenue	=	\$ 1,500,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 255,000.00
Administrative Service Charge	\$	\$ 98,000.00
Instructional support (38%)	\$	\$ 570,000.00
Student support (20%)	\$	\$ 300,000.00
Technology and operations (15%)	\$	\$ 277,000.00
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 1,500,000.00



PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: Herberger Institute for Design and the Arts
 Department: The Design School Program: Master of Science in Architecture
 Both Graduate Undergraduate

Resident: \$ 1,625 /semester \$ 2,500 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Non-Resident: \$ 1,625 /semester \$ 2,500 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Program Fee History:		Most Recent Date & Change to fee (Date/Amount)
Resident:		
Date Fee Established	<u>Fall 2004</u> and original amount <u>\$ 2,250</u>	<u>Fall 2006 \$ 1,625</u>
		Most Recent Date & Change to fee (Date/Amount)
Non-Resident:		
Date Fee Established	<u>Fall 2004</u> and original amount <u>\$ 2,250</u>	<u>Fall 2006 \$ 1,625</u>

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The MS in Architecture is a research-based degree program focused on investigating new opportunities in energy performance and climate-responsive structures. Students in this program graduate with the skills necessary to develop careers in energy-efficiency building design and expertise in energy technologies. Students in this program tend to hold an undergraduate degree in Architecture or allied design fields, and may hold a professional degree (BArch or MArch). These students seek more expertise in energy systems, made possible through this program. The current program fee amount was established in 2006 and, since that time, the costs associated with offering this program have risen substantially. This request will enable appropriate support for these students while keeping the program well-placed within the overall market. Program fees will significantly enhance the quality of the student experience, providing improvements to the curriculum through investments in faculty, high level of student services, advanced software and technology costs, support funding for studio projects and travel, as well as financial aid opportunities.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

Increased program fee revenues will fund investments in updated technological resources (hardware and software); professional networking opportunities; advising; student travel for conferences, research, and to fulfill curricular requirements; high-quality student services; and faculty.

This fee is higher than other TDS MS program fees, as the MS Architecture students need access to technological resources that are not typically used in the other MS programs, including energy systems analysis, GIS, and Virtual Reality systems. The increased fee is designed to ensure students have access to these technologies, increasing their skill-sets and future career potential.

The requested fee would apply to all new students of the Master of Science in Architecture program, upon ABOR approval, effective Fall 2020.

The fee revenue will fund a portion of the costs to offer the program. 17% of the program fees are set aside for financial aid.

Student Consultation (Please describe the method and outcomes of student consultation)

The Design School sought input from students currently enrolled in the MS in Architecture program. Students initially were asked to participate via focus groups, but all invited declined to do so. As an alternate means to gather input, a survey was distributed to all current students via email on 11/17/20 by the Associate Director for Academic Affairs. On 11/24/20 the survey closed due to deadline limitations, with a 25% response rate (1 of 4 total students enrolled responded). Additional students from the fourth year BSD Architectural Studies students—potential recruits for the MS Architecture program—were also invited to participate. No responses from this group were received despite reminder invitations.

The respondent indicated support for the use of the fee revenue for professional development, out of the options presented:
 Scholarships (0%);
 Professional Development (conference/research support) (100%);
 Guest speakers & Visiting Professors (0%);
 Workshops (0%);
 New Technology/ Facilities updates (0%);
 Other. (%)

The respondent agreed with the following statement: "I support the proposed program fee for uses identified above."

In response to an open ended question, the respondent expressed support for fees to be used for workshops and travel, and development of more interdisciplinary courses.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	MS Architecture	\$ 17,608	\$ 29,432	
University of Arizona	MS Architecture	16,272.00	36,399.00	
University of Texas—Austin	MS Architecture Studies	12,478.00	23,302.00	
University of Illinois—Urbana-Champs	MS Architecture	16,028.00	31,046.00	
University of Michigan—Ann Arbor	MS Architecture	32,402.00	49,351.00	
Pennsylvania State University—University Park	MS Architecture	22,994.00	38,728.00	
University of Washington—Seattle	MS Architecture	18,477.00	37,695.00	
University of California—Los Angeles	MS Architecture and Urban Design	17,486.00	32,588.00	
University of California, Berkeley	MS Building Science, Technology, and Sustainability	27,368.00	39,614.00	
University of Maryland—College Park	MS Architecture	14,794.00	30,886.00	
University of Oregon	MS Architecture	17,929.00	25,384.00	
University of Massachusetts—Amherst	Master of Design in Architecture	16,235.00	32,342.00	
Texas A&M University	MS Architecture	14,590.00	29,932.00	
Massachusetts Institute of Technology	MS Architecture	53,450.00	53,450.00	
Carnegie Mellon	MS Architecture, Engineering, Construction Management	42,000.00	42,000.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 5,000.00
Number of Students	#	\$ 7
Total Revenue	=	\$ 35,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 5,950.00
Administrative Service Charge	\$	\$ 2,250.00
Instructional support (38%)	\$	\$ 13,300.00
Student support (20%)	\$	\$ 7,000.00
Technology and operations (15%)	\$	\$ 6,500.00
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 35,000.00



PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: Herberger Institute for Design and the Arts
 Department: The Design School (TDS) Program: MS Design in Industrial Design, Interior Design, Visual Cor
 Both Graduate Undergraduate

Resident: \$ 500 /semester \$ 1,000 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Non-Resident: \$ 500 /semester \$ 1,000 /semester Effective Date: Fall 2021
Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Program Fee History:		Most Recent Date & Change to fee (Date/Amount)
Resident:		
Date Fee Established	<u>Fall 2004</u> and original amount <u>\$ 450</u>	<u>Fall 2006 \$ 500</u>
		Most Recent Date & Change to fee (Date/Amount)
Non-Resident:		
Date Fee Established	<u>Fall 2004</u> and original amount <u>\$ 450</u>	<u>Fall 2006 \$ 500</u>

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The MS in Design programs are research-based degree programs within the The Design School (TDS), focused on investigating new opportunities in all design disciplines. Students in these programs graduate with the skills necessary to develop careers in design-research areas. Students in this program tend to hold an undergraduate degree in related design fields, and are seeking expertise to develop a research-related career path within a creative profession. The current program fee amount was established in 2006 and, since that time, the costs associated with offering these programs have risen substantially. As a result, there is insufficient revenue to support the students in these programs properly. This request will enable appropriate support for these students while keeping the programs well-placed within the overall market. Program fees will significantly enhance the quality of the student experience through investments in higher levels of student services, advanced software and technology, research projects and conference travel, faculty, and increased financial aid.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

Increased program fee revenues will fund investments in updated technological resources (hardware and software); professional networking opportunities; advising; student travel for conferences, research, and to fulfill curricular requirements; high-quality student services; and faculty.

The requested fee would apply to all new students in MS Design programs, upon ABOR approval, effective Fall 2020.

The fee revenue will fund a portion of the costs to offer the program. 17% of the fee revenue will be set aside for financial aid.

Student Consultation (Please describe the method and outcomes of student consultation)

The Design School (TDS) sought input from students currently enrolled in the MS Design programs as well as from a select group of fourth-year students—potential recruits to the master programs. TDS initially invited students to participate in focus groups as a means to collect feedback, however none opted to participate. As an alternate means to gather input, a survey was distributed to all current students via email on 11/17/20 by the Associate Director for Academic Affairs. On 11/24 the survey closed, with a 20% response rate (2 of 10 student representatives responded). Respondents responded in the following percentages to the question: "I believe proposed fees could improve student educational experiences if they were used to support:"
 Scholarships (50%);
 Professional Development (conference/research support) (50%);
 Guest speakers & Visiting Professionals (0%);
 Targeted Workshops (0%);
 New Technology/ Facilities updates (0%);
 Other: (0%).

Students also were asked to respond to the following: "I support the proposed program fee for uses identified above:" Strongly Agree (0%); Agree (50%); Neither agree nor disagree (0%); Disagree (0%); Strongly Disagree (0%). 2019 results yielded the following percentages: "I support the proposed program fee for uses identified above:" Strongly Agree (33.3%); Agree (16.7%); Neither agree nor disagree (16.7%); Disagree (16.7%); Strongly Disagree (16.6%).

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	MS Industrial Design, MS Interior Design, MS Visual Communication Design	\$ 14,608	\$ 26,432	
University of Michigan—Ann Arbor	Master of Design	25,385.00	50,252.00	
University of Washington—Seattle	Master of Design	17,299.00	30,123.00	
University of Texas—Austin	MFA Design, MA Design in Health	12,652.00	23,678.00	
Ohio State University—Columbus	MFA Design Research and Development	12,425.00	36,009.00	
University of Illinois—Urbana-Champs	MFA Graphic Design, MFA Industrial Design	16,508.00	31,977.00	
Pennsylvania State University—University Park	MFA Graphic Design	22,994.00	38,728.00	
Indiana University—Bloomington	MFA Graphic Design	10,914.00	34,303.00	
Florida State University	MS Interior Architecture	11,554.00	26,707.00	
University of California—Los Angeles	MFA Design & Media Arts	13,033.00	28,135.00	
Rutgers University, New Brunswick	MFA Design	23,884.00	35,044.00	
University of Cincinnati	Master of Design	14,902.00	26,644.00	
Carnegie Mellon	Master of Design	42,000.00	42,000.00	
IIT Institute of Design	Master of Design	49,002.00	49,002.00	
Parsons School of Design	Master of Design	51,750.00	51,750.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 2,000.00
Number of Students	#	\$ 26
Total Revenue	=	\$ 52,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 8,840.00
Administrative Service Charge	\$	\$ 3,400.00
Instructional support (38%)	\$	\$ 19,760.00
Student support (20%)	\$	\$ 10,400.00
Technology and operations (15%)	\$	\$ 9,600.00
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 52,000.00



PROGRAM FEE REQUEST - NEW

University: Arizona State University College/School: Mary Lou Fulton Teachers College

Department: Teacher Preparation Program: Graduate Teacher Certificate (Online)

Both
 Graduate
 Undergraduate Both
 Choose One Option

Resident: \$1679.00 / \$73/cr /credit
 Proposed Fee Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)

Non-Resident: \$1679.00 / \$73/cr /credit
 Proposed Fee Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The online programs offered by Mary Lou Fulton Teachers College provide meaningful learning activities for students to put theory in practice – to apply what they learn to the context in which they want to work. Online courses challenge students to engage with the content, with their instructors, and with each other. High-quality online programs require professional course design, frequent in-depth and personalized feedback to students on their work, and focused retention efforts to ensure students persist and complete the program. In particular, the Teachers College emphasis on student engagement in real-world problems and evidence-based practice necessitates an investment that supports quality learning design. The program fee would support investments in five main areas, including: personnel; program and course design and development; professional development; learning technologies and systems; and financial aid.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

Proposed uses for the program fee include:

- * Online course design and instructional design support
- * Ongoing professional development for faculty, staff, and instructional designers
- * Facilitation of small groups during coursework to provide frequent in-depth and personalized feedback
- * Instructional technologies to support online curriculum and asynchronous and synchronous learning meetings
- * Licenses for systems that provide learning experiences such as video-based assessments, interactive learning modules, and coaching and mentoring feedback from peers and instructors.
- * Enhanced student advising and retention efforts, including co- and extracurricular activities
- * Additional administrative coordination
- * Requisite percentage (17%) of revenue for financial aid

The fee revenue will support a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

To solicit feedback, a survey was sent to all campus-based students currently enrolled in a graduate teacher preparation program (367 students) and 63 responses were received. Of the responses, 45% reported to be moderately to very supportive of the proposed online fee for incoming students. 50% of respondents indicated that they were very or highly satisfied with the online course design of their courses. This will be a primary area of focus to ensure the learning experience is of the highest quality. Forty-four percent reported to be moderately and highly supportive of fees being used for student support initiatives, such as enhanced academic advising, online student resources and orientations. Over 53% reported to be moderately to highly supportive of fees being used for instructional technologies for online curriculum or technology systems that provide learning experiences such as video-based assessments, interactive learning modules, and coaching and mentoring feedback from peers and instructors.

College leadership also provided information about the proposed fee to the President of the Graduate and Professional Student Association, who shared the information with Assembly student representatives. Students were requested to provide notification by January 25th if further discussion was needed. To date, no follow-up has been requested.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	Graduate Certificate			12,969 R; 14,168 NR
Pennsylvania State	Masters of Education			27720.00
Rutgers University-New Brunswick	Ed.M. Certification in Elementary Education			27000.00
University of Connecticut	Masters in Curriculum & Instruction			24750.00
university of Minn-Twin Cities	MEd Arts in Education			51000.00
Michigan State University	Masters of Arts in Teaching and Curriculum			25000.00
University of Washington Seattle	Masters of Secondary Education			26505.00
University of Illinois-Urbana Champ	Masters of Education			15680.00
University of Maryland-College Park	MEd Teaching and Learning			23724.00
Ohio University-Columbus	Masters of Education in Middle Childhood			24825.00
University of Wisconsin-Madison	Masters o f Secondary Education			24000.00
Florida State University	Masters in Elementary Education			32370.00
University of Iowa	Masters Arts of Education			28485.00
Indiana	Masters in Elementary Education			18909.00

BUDGET

Financial Aid Set Aside (FSA) Amount: 17%

Proposed Annual Revenue

Program Fee	\$	1679.00
Number of Students	#	150
Total Revenue	=	251,850.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	42815.00
Administrative Service Charge	\$	16415
Instructional and support staff	\$	169620
Technology and operating	\$	23000
	\$	
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	251,850.00



PROGRAM FEE REQUEST - NEW

University: Arizona State University College/School: Sandra Day O'Connor College of Law
 Department: Graduate Programs Program: Master of Human Resources and Employment Law

Both Graduate Undergraduate

Resident: \$ 725 /credit Proposed Fee Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)

Non-Resident: \$ 725 /credit Proposed Fee Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The Master of Human Resources and Employment Law (MHREL) is a new degree program. This fee proposal will ensure that this new program can build from the strong foundation already in existence for the Master of Legal Studies program, from which the MHREL will branch off. Revenues from the fees will provide flexibility as the program deals with issues of scale. Revenues will benefit students in the program and beyond through funding for additional student services and technology staff, creating pipelines to post-graduation employment through career services relationships, accreditation with a national industry certification organization, and investments in continuing education curriculum and career services support to enhance student expertise and marketability after graduation.

There are few non-Juris Doctor graduate programs that train human resources professionals to understand the complex legal and regulatory framework of employment law. The program fee structure is in line with the competitive marketplace for a degree like this, and the fixed cost-per-credit caters to the established student population of working professionals that likely will be attending part-time. While there are not many competitors for this specific degree at this time, new market entrants are expected in the years to come. The law school believes that being among the first to offer this particular degree will enhance the University's reputation for innovation, and make ASU Law the preeminent brand for this type of degree. The proposed program fee structure will be attractive to students who want to earn this degree from an elite law school at a reasonable price, while also allowing ASU Law to compete with lower tier law schools that cost less to attend (see market pricing below). In short, this proposal strikes a nice balance between prestige and value for students.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

All degree programs at the College of Law have program fees to ensure the world-class student experience expected from an elite law school. The fees will support the quality of the MHREL program through investments in faculty and faculty development, curriculum creation and redevelopment, marketing efforts aimed at raising the profile of this unique program, and enhancements to basic educational infrastructure including information technology. Additionally, the fee structure will allow the College of Law to provide more funding for need and merit-based financial aid.

The fee revenue will fund a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

Current Master of Legal Studies (MLS) students were surveyed via email on their satisfaction with the services and current tuition and fee structure for with the MLS program (from which the new MHREL/O degree will branch). They also were asked about the program fees for the MHREL program and the services it will provide. There was a total of 91 respondents - 11 MLS campus immersion students and 80 MLS online students. 27 respondents were students currently pursuing the Human Resources and Employment Law track within the MLS program (MLSHREL). The responses were as follows:

Respondents were overwhelmingly satisfied with the services provided in the current MLS program. Out of the 91 total respondents, 46% were extremely satisfied, 35% satisfied, 15% neutral, 4% not satisfied, and 1% extremely dissatisfied. The MLSHREL cohort reported rates as follows: extremely satisfied - 37%, satisfied - 44%, neutral - 19%, with no respondents expressing any dissatisfaction.

Respondents were asked about their satisfaction with the current tuition and fee structure for the MLS program. Out of the 91 total respondents, 14% were extremely satisfied, 23% satisfied, 30% neutral, 29% not satisfied, and 4% extremely dissatisfied. The MLSHREL cohort reported rates as follows: extremely satisfied rate - 4%, satisfied - 41%, neutral - 2%, dissatisfied - 30%, and extremely dissatisfied - 4%.

Students were asked about support for program fees for the new MHREL degree if the fees helped to support the quality of instruction and faculty. 13% expressed strong support, 23% support, 33% neutral, 23% did not support fees, and 8% were strongly against fees. The MLSHREL cohort expressed support for fees as follows: strongly support - 15%, support - 22%, neutral - 7%, not supportive - 19%, and 7% strongly opposed. Support for the use of fees to support/enhance the academic experience of students were as follows: 19% - strongly support, 33% - support, 29% - neutral, 14% did not support, and 6% - strongly opposed. The MLSHREL cohort reported support as follows: strongly support - 22%, support - 22%, neutral - 30%, did not support - 11%, and strongly opposed - 7%.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
University of Southern California	Master of Studies in Law (MSL)	\$ 68,628	\$ 68,628	
Washington University-St. Louis	Master of Legal Studies (MLS)	60,888.00	60,888.00	
University of Georgia	Master of Studies in Law (MSL)	23,590.00	49,960.00	
University of Illinois	Master of Studies in Law (MSL)	54,516.00	54,516.00	
University of California-Los Angeles	Master of Legal Studies (MLS)	64,196.00	64,196.00	
University of Arizona	Master of Legal Studies (MLS)	26,000.00	26,000.00	
Ohio State University	Master of Studies in Law (MSL)	31,314.00	59,911.00	
Florida State University	Juris Master	20,643.00	40,650.00	
Washington University	Master of Jurisprudence	29,250.00	29,250.00	
Arizona State University	M of Human Resources and Employment Law	33,470.00	53,150.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 0.0%

Proposed Annual Revenue

Program Fee	\$	\$ 21,750.00
Number of Students	#	\$ 8
Total Revenue	=	\$ 174,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 0.00
Administrative Service Charge	\$	\$ 12,500.00
Curriculum Development and Course Delivery	\$	\$ 40,000.00
Student Support and Student Services	\$	\$ 48,000.00
Technology and Operating	\$	\$ 25,000.00
Marketing and Communications/Recruitment	\$	\$ 35,000.00
Scholarships	\$	\$ 13,500.00
	\$	
	\$	
Total Program Costs	=	\$ 174,000.00



PROGRAM FEE REQUEST - NEW

University: Arizona State University College/School: Sandra Day O'Connor College of Law
 Department: Graduate Programs Program: M of Human Resources and Employment Law (Online)

Both Graduate Undergraduate

Resident: \$ 658 /credit Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)
 Proposed Fee

Non-Resident: \$ 658 /credit Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)
 Proposed Fee

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The Master of Human Resources and Employment Law (MHRELO) is a new degree program. This fee proposal will ensure that this new program can build from the strong foundation already in existence for the Master of Legal Studies program, from which the MHRELO will branch off. Revenues from the fees will provide flexibility as the program deals with issues of scale. Revenues will benefit students in the program and beyond through funding for additional student services and technology staff, creating pipelines to post-graduation employment through career services relationships, accreditation with a national industry certification organization, and investments in continuing education curriculum and career services support to enhance student expertise and marketability after graduation.

There are few non-Juris Doctor graduate programs that train human resources professionals to understand the complex legal and regulatory framework of employment law. The program fee structure is in line with the competitive marketplace for a degree like this, and the fixed cost-per-credit caters to the established student population of working professionals that likely will be attending part-time. While there are not many competitors for this specific degree at this time, new market entrants are expected in the years to come. The law school believes that being among the first to offer this particular degree will enhance the University's reputation for innovation, and make ASU Law the preeminent brand for this type of degree. The proposed program fee structure will be attractive to students that want to earn this degree from an elite law school at a reasonable price, while also allowing ASU Law to compete with lower tier law schools that cost less to attend (see market pricing below). In short, this proposal strikes a nice balance between prestige and value for students.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

All degree programs at the College of Law have program fees to ensure the world-class student experience expected from an elite law school. The fees will support the quality of the MHREL program through investments in faculty and faculty development, curriculum creation and redevelopment, marketing efforts aimed at raising the profile of this unique program, and enhancements to basic educational infrastructure including information technology. Additionally, the fee structure will allow the College of Law to provide more funding for need and merit-based financial aid.

The fee revenue will fund a portion of the costs to operate the program.

Student Consultation (Please describe the method and outcomes of student consultation)

Current Master of Legal Studies (MLS) students were surveyed via email on their satisfaction with the services and current tuition and fee structure for with the MLS program (from which the new MHRELO degree will branch). They also were asked about the program fees for the MHREL program and the services it will provide. There was a total of 91 respondents - 11 MLS campus immersion students and 80 MLS online (MLSO) students. 27 respondents were students currently pursuing the Human Resources and Employment Law track within the MLS program (MLSHREL). The responses were as follows:

Respondents were overwhelmingly satisfied with the services provided in the current MLS program. Out of the 91 total respondents, 46% were extremely satisfied, 35% satisfied, 15% neutral, 4% not satisfied, and 1% extremely dissatisfied. The MLSO cohort reported slightly higher satisfaction as follows: 51% extremely satisfied, 36% satisfied, 11% neutral, and 5% not satisfied. The MLSHREL cohort reported rates as follows: extremely satisfied - 37%, satisfied - 44%, neutral - 19%, with no respondents expressing any dissatisfaction

Respondents were asked about their satisfaction with the current tuition and fee structure for the MLS program. Out of the 91 total respondents, 14% were extremely satisfied, 23% satisfied, 30% neutral, 29% not satisfied, and 4% extremely dissatisfied. The MLSO cohort reported rates as follows: 16% extremely satisfied, 24% satisfied, 31% neutral, 26% not satisfied, and 3% extremely dissatisfied. The MLSHREL cohort reported rates as follows: extremely satisfied rate - 4%, satisfied - 41%, neutral - 2%, dissatisfied - 30%, and extremely dissatisfied - 4%.

Students were asked about support for program fees for the new MHREL degree if the fees helped to support the quality of instruction and faculty. 13% expressed strong support, 23% support, 33% neutral, 23% did not supportive, and 8% strongly opposed. The MLSO cohort reported rates as follows: 11% expressed strong support, 25% support, 35% neutral, 23% did not support, and 6% strongly opposed. The MLSHREL cohort expressed support for fees as follows: strongly support - 15%, support - 22%, neutral - 7%, not supportive - 19%, and 7% strongly opposed. Support for the use of fees to support/enhance the academic experience of students were as follows: 19% - strongly support, 33% - support, 29% - neutral, 14% did not support, and 6% - strongly opposed. The MLSO cohort reported rates as follows: 18% expressed strong support, 35% support, 30% neutral, 14% did not support, and 4% strongly opposed. The MLSHREL cohort reported support as follows: strongly support - 22%, support - 22%, neutral - 30%, did not support - 11%, and strongly opposed - 7%.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Washington University-St. Louis	Master of Legal Studies (MLS)			\$ 58,800
University of Southern California	Master of Studies in Law (MSL)			55,734.00
University of Arizona	Master of Legal Studies (MLS)			19,500.00
Pepperdine University	Master of Legal Studies (MLS)			67,680.00
Florida State University	Juris Master Online			39,600.00
Arizona State University	M of Human Resources/Employment Law Online	31,460.00	35,700.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 0.0%

Proposed Annual Revenue

Program Fee	\$	\$ 19,740.00
Number of Students	#	\$ 42
Total Revenue	=	\$ 829,080.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 0.00
Administrative Service Charge	\$	\$ 64,180.00
Curriculum Development and Course Delivery	\$	\$ 210,000.00
Student Support and Student Services	\$	\$ 184,000.00
Technology and Operating	\$	\$ 90,000.00
Marketing/Recruitment	\$	\$ 50,000.00
Scholarships	\$	\$ 10,000.00
College Support (Programs/Centers, IT, etc.)	\$	\$ 220,900.00
	\$	
Total Program Costs	=	\$ 829,080.00



PROGRAM FEE REQUEST - NEW

Rev 2-19-18

University: Arizona State University College/School: The College of Liberal Arts and Sciences
 Department: The School of Social Transformation Program: MA Women and Gender Studies (Online)

Both Graduate Undergraduate

Resident: \$ 80 /credit Proposed Fee Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)

Non-Resident: \$ 80 /credit Proposed Fee Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The first fully online M.A. degree in Women and Gender Studies offered in the nation, in partnership with Ms. Magazine, will provide students with professional training in the interdisciplinary field of women and gender studies, preparing them for divergent career paths that fit their professional aspirations and help further advance current placements. This innovative degree is like no other offered in the nation. It will provide advanced training to and broaden career opportunities for a more diverse range of students. The proposed program fee will help to support high quality instruction and ensure positive student outcomes. The fees will help to support instructional needs, a variety of applied content, technological innovations, course development and, as we continue to scale and grow the program, additional staffing to support student success.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The fee revenue will support the following:

- 1) Instructional support dedicated to this program to meet growth demand.
- 2) Expert practitioners with professional experience for applied coursework in specific areas (program evaluation, policy, etc.) in collaboration with the partnership with Ms. Magazine.
- 3) As the program scales, a graduate coordinator will help manage and maintain program development and additional staff will support students.
- 4) Technological innovations will help to develop innovative curriculum, further and to maintain and update digital tools and content.
- 5) Student access to secondary quantitative databases for use in research methods courses and for research purposes.
- 6) General program operating needs.
- 7) 17% of fee revenue set aside for financial aid.

The fee will cover a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

A survey was distributed to current majors and minors in the Women and Gender Studies program via email. Students were asked the following questions: 1) if they had interest in enrolling in such a degree program; 2) how (if) fees add value to the degree; and 3) if the proposed fee was reasonable. Responses were received from 81 students, including majors both in and outside of the program area. Sixty-six percent said they have interest in this degree program, see the benefits in obtaining a degree like this and would consider enrolling. In the comment section many expressed their excitement and ways in which this degree would be beneficial, including, for example, the need for online advanced degrees particularly for working students and those with families. In terms of the fee, 51% of the respondents considered the \$80 fee reasonable, 22% were somewhat undecided, and 26% percent did not consider it reasonable.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	MA Women and Gender Studies	\$ 14,328	\$ 18,898	
Rutgers	MA Women's, Gender and Sexuality Studies	12,486.00	30,144.00	
Ohio State University	MA Women, Gender and Sexuality Studies	12,425.00	34,929.00	
Texas Women's University	MA Women's and Gender Studies	7,662.00	15,386.00	
Oregon State University	MA Women and Gender Studies	15,267.00	24,975.00	
University of Colorado Denver	MA Women's and Gender Studies	13,566.00	22,590.00	
UNC Greensboro	MA Women's and Gender Studies	21,066.00	35,360.00	
University of Arizona	JD/MA Gender and Women Studies	25,834.00	30,334.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee	\$	\$ 2,400.00
Number of Students	#	\$ 75
Total Revenue	=	\$ 180,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 30,600.00
Administrative Service Charge	\$	\$ 11,650.00
Instructional support	\$	\$ 80,000.00
Staff support	\$	\$ 51,000.00
Technology and operating	\$	\$ 6,750.00
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 180,000.00



PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: Thunderbird School of Global Management
 Department: _____ Program: MA Global Affairs and Management
 Both Graduate Undergraduate

Resident: \$ 1,468 /credit \$ 1,957 /credit Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)
Current Rate Proposed Rate

Non-Resident: \$ 1,468 /credit \$ 1,957 /credit Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)
Current Rate Proposed Rate

Program Fee History:		Most Recent Date & Change to fee (Date/Amount)
Resident:		
Date Fee Established	<u>Fall 2015</u> and original amount <u>\$ 1,468</u>	<u>Fall</u>
		Most Recent Date & Change to fee (Date/Amount)
Non-Resident:		
Date Fee Established	<u>Fall 2015</u> and original amount <u>\$ 1,468</u>	<u>Fall</u>

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The MA in Global Affairs and Management (MAGAM) will be offered in Los Angeles, CA. This request for an increase in the fee is needed to accommodate an increased expense structure in the delivery of the program in Los Angeles. Increased expenditures include a higher service level to students (professional coaching, career management services, meals, etc.), travel costs for renowned faculty from Arizona campuses and across the globe to teach in LA, degree promotion and awareness in the local market, convocation for students in LA, and program staff/administration in LA.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

- The revenue generated from the fee increase will support increased costs as follows:
- Student services - professional coaching, career management services, meals, etc.;
 - Faculty - faculty travel to Los Angeles;
 - Program marketing and promotion in the local market;
 - Convocation ceremony in LA;
 - Program staff/administration in LA; and,
 - Scholarships and financial aid (including 17% set aside)

The fee revenue covers a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

Thunderbird Associate Dean of Graduate Programs conducted a feedback session for students in the DC based Executive Master of Arts in Global Affairs and Management (MAGAM) program on Monday, Jan 25, 2021. All the 2020 and 2021 cohorts of students (32 students total) were invited to discuss the fee increase for the Executive and non-executive MAGAM program in both DC and LA. 9 students attended the event: 3 graduated in Dec 2020 and 6 were current students. For the other 21 students who did not attend, we assume they were indifferent about the fee increase. The need for an increase in fees were explained: to cover the costs of flying faculty to DC/LA to teach, hiring program managers in the local locations, the additional operating costs of providing food and renting the venue for special events, and the surcharge of providing services in these high-cost locations. It was explained that the fee increase would help support scholarships for students who could not afford the degree otherwise. Of the 9 students, one said the fee increase is justifiable as long as the program is not online, which it is not. Another mentioned if the cohort remains small, the increase of fees is justifiable as students get a lot of individual attention. Another student said a higher fee could also signal quality, and could enhance the reputation of the program. A vote was taken at the end of the feedback session, and all 9 attendees unanimously voted for the increase.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
ASU	MA Global Affairs and Management	\$ 75,000	\$ 75,000	
University of Southern California	Master of Business Administration	135,000.00	135,000.00	
University of Southern California	MS in Marketing	59,400.00	59,400.00	
Pepperdine University	MS in Global Business	87,300.00	87,300.00	
Pepperdine University	Master of Business Administration	105,440.00	105,440.00	
UCLA	Master of Business Administration	104,954.00	104,954.00	
UC Riverside	Master of Business Administration	88,000.00	112,000.00	
University of Southern California	MS in Global Supply Chain			63,000.00

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 58,710.00
Number of Students	#	\$ 23
Total Revenue	=	\$ 1,350,330.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 229,556.10
Administrative Service Charge	\$	\$ 87,773.90
Faculty	\$	\$ 405,000.00
Staff support	\$	\$ 118,000.00
Program and travel expenses	\$	\$ 300,000.00
Marketing and recruitment	\$	\$ 210,000.00
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 1,350,330.00



PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: Thunderbird School of Global Management
 Department: _____ Program: MA Global Affairs and Management (Executive)
 Both Graduate Undergraduate

Resident: \$ 1,468 /credit \$ 1,957 /credit Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)
Current Rate Proposed Rate

Non-Resident: \$ 1,468 /credit \$ 1,957 /credit Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)
Current Rate Proposed Rate

Program Fee History:		Most Recent Date & Change to fee (Date/Amount)
Resident:		
Date Fee Established	<u>Fall</u> <u>2015</u> and original amount <u>\$ 1,468</u>	<u>Fall</u> _____
		Most Recent Date & Change to fee (Date/Amount)
Non-Resident:		
Date Fee Established	<u>Fall</u> <u>2015</u> and original amount <u>\$ 1,468</u>	<u>Fall</u> _____

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The MA in Global Affairs and Management (MAGAM) is now being offered as an Executive program in Washington D.C. This request for an increase in the fee is needed to accommodate an increased expense structure in the delivery of the degree to an executive level student in Washington DC. Increased expenditures include a higher service level to students (professional coaching, career management services, meals, etc.), travel costs for renowned faculty from Arizona campuses and across the globe to teach in DC, degree promotion and awareness in the local market, convocation for students in DC, and program staff/administration in DC.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The revenue generated from the fee increase will support increased costs as follows:

- Student services - professional coaching, career management services, meals, etc.;
- Faculty - faculty travel to Washington DC;
- Program marketing and promotion in the local market;
- Convocation ceremony in DC;
- Program staff/administration in DC; and,
- Scholarships and financial aid (including 17% set aside)

The fee revenue covers a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

Thunderbird Associate Dean of Graduate Programs conducted a feedback session for students in the DC based Executive Master of Arts in Global Affairs and Management (MAGAM) program on Monday, Jan 25, 2021. All the 2020 and 2021 cohorts of students (32 students total) were invited to discuss the fee increase for the Executive and non-executive MAGAM program in both DC and LA. 9 students attended the event: 3 graduated in Dec 2020 and 6 were current students. For the other 21 students who did not attend, we assume they were indifferent about the fee increase. The need for an increase in fees were explained: to cover the costs of flying faculty to DC/LA to teach, hiring program managers in the local locations, the additional operating costs of providing food and renting the venue for special events, and the surcharge of providing services in these high-cost locations. It was explained that the fee increase would help support scholarships for students who could not afford the degree otherwise. Of the 9 students, one said the fee increase is justifiable as long as the program is not online, which it is not. Another mentioned if the cohort remains small, the increase of fees is justifiable as students get a lot of individual attention. Another student said a higher fee could also signal quality, and could enhance the reputation of the program. A vote was taken at the end of the feedback session, and all 9 attendees unanimously voted for the increase.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
ASU	Exec MA Global Affairs and Management	\$ 75,000	\$ 75,000	
Georgetown University	Exec M of Leadership	70,088.00	70,088.00	
Georgetown University	Exec M of Policy Leadership	64,170.00	64,170.00	
American University	Exec M of International Service	61,350.00	61,350.00	
American University	Exec M of Public Administration	68,067.00	68,067.00	
Columbia University	Exec M of Change Leadership	88,450.00	88,450.00	
Syracuse University	Exec M in International Relations	48,600.00	48,600.00	
Seton Hall University	Exec MS in International Affairs			37,800.00

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 58,710.00
Number of Students	#	\$ 22
Total Revenue	=	\$ 1,291,620.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 219,575.40
Administrative Service Charge	\$	\$ 84,044.60
Faculty	\$	\$ 400,000.00
Staff support	\$	\$ 110,000.00
Program and travel expenses	\$	\$ 298,000.00
Marketing and recruitment	\$	\$ 180,000.00
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 1,291,620.00



PROGRAM FEE REQUEST - NEW

University: Arizona State University College/School: Watts College of Public Service & Community Solutions
 Department: School of Criminology and Criminal Justice Program: MS in Crime Analysis

Both
 Graduate
 Undergraduate

Resident: \$ 100 /credit Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)
 Proposed Fee

Non-Resident: \$ 100 /credit Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)
 Proposed Fee

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>3</u>	<u>3</u>
Percent of classes within the program with a fee:	<u>30%</u>	<u>30%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The MS in Crime Analysis is an advanced degree program providing motivated students with knowledge, skills and abilities to assume positions of leadership and key management positions in the emerging field of crime analysis. This program will be offered both online and as a campus-based program. As one of the first graduate programs of its kind in the nation, this program will be at the forefront of providing a top-ranked education in crime analysis, as well as innovative research. The fee revenue will help to provide a quality experience through the expertise of faculty and working professionals who can convey both conceptual and pragmatic information to enrolled students. In addition to faculty expertise, the program fee will support course design, immersive simulation learning experiences, and access to software and other technological tools.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The fee will support:

- Specialized faculty expertise;
- Small sections for the capstone project course to provide a personalized learning experience;
- Innovative learning opportunities such as site visits and simulation learning experiences;
- Instructional design and use of additional technology tools to enhance the learning experience;
- Marketing and recruitment to attract competitive students to the program;
- 17% set aside for financial aid.

The fee revenue will cover a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

In January 2021, a survey was sent to current online graduate students and prospective online students in undergraduate programs in the School of Criminology and Criminal Justice. Surveys were distributed to 175 current students and 1,199 prospective students. Current and prospective students were asked a series of questions about their views on online vs. in-person course delivery, attitudes about fees, and where best to target the funds raised from fees. The response rate for each group was approximately 9% for current students and 8.3% for prospective students. The graduate students were predictably opposed to raising fees, but supported using fees to improve program quality such as by offering more elective course, hiring more advisors, and improving course design. Generally, more electives and more effective course content were noted as high priorities, and in both cases, both graduate and undergraduate students were about evenly divided on support for program fees.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	M.S in Crime Analysis	\$ 14,408	\$ 26,232	\$ 11,782
Michigan State University	M.S. Law Enforcement Intelligence & Analysis	14,144.00	27,792.00	22,350.00
George Washington University	M.S. Crime Scene Investigations	31,824.00	31,824.00	
Boston University	M.S. in Criminal Justice	56,854.00	56,854.00	
Northeastern University	M.S. Criminology & Criminal Justic	32,354.00	32,354.00	32,354.00
University of California-Irvine	M. Adv Study in Criminology, Law & Socie			14,901.00

BUDGET

Financial Aid Set Aside (FSA) Amount: 0.0%

Proposed Annual Revenue

Program Fee	\$	\$ 1,800.00
Number of Students	#	\$ 25
Total Revenue	=	\$ 45,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 0.00
Administrative Service Charge	\$	\$ 2,875.00
FASA	\$	\$ 7,650.00
Instructional support	\$	\$ 22,175.00
Site visits	\$	\$ 2,300.00
Marketing/recruitment	\$	\$ 2,000.00
College and operating support	\$	\$ 8,000.00
	\$	
	\$	
Total Program Costs	=	\$ 45,000.00



PROGRAM FEE REQUEST - NEW

University: Arizona State University

College/School: Watts College of Public Service & Community Solutions

Department: _____

Program: MA in Policy Advocacy (Online)

Both
 Graduate
 Undergraduate

Resident:	\$ 100	/credit	Effective Date:	Fall	2021
	Proposed Fee		(this field you may enter other option just by typing it in box)		

Non-Resident:	\$ 100	/credit	Effective Date:	Fall	2021
	Proposed Fee		(this field you may enter other option just by typing it in box)		

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>1</u>	<u>1</u>
Percent of classes within the program with a fee:	<u>10%</u>	<u>10%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The MA in Policy Advocacy will be offered through ASU Online and provides students with the expertise and knowledge required to navigate the legal, communication, political and policy landscapes of policy advocacy work. To provide a quality experience, the expertise of faculty and working professionals is needed to convey both conceptual and pragmatic information to students. This fee will support online course development and program delivery, student services, and technology to support the innovative curriculum.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The fee revenue will support:

- Faculty who will create unique learning opportunities in the online format and provide additional professional development opportunities (extra-curricular learning options);
- Smaller sections of the capstone project course to support experiential learning;
- Instructional design and additional technology tools to enhance the online learning experience;
- Administrative and student support services;
- Marketing and recruitment to attract competitive students to the program; and
- 17% set aside for financial aid.

The fee revenue will cover a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

Current students in Watts College online professional programs, with similar foci to the proposed degree, and prospective students in undergraduate programs in the School of Public Affairs and the School of Social Work were surveyed in January 2021. Surveys were distributed to 1,094 current students and 624 prospective students. These students were asked a series of questions about their views of online vs. in-person course delivery, attitudes about fees, and where best to target the funds raised from fees. The response rate for each group was approximately 12% for current students and 19% for prospective students. Both graduate and undergraduate students were about evenly split on preferences for mode of instructional delivery, with more electives, more effective course content, and more resources such as advising noted as high priorities. In both cases, current and prospective students were about evenly divided on support for program fees.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	MA Policy Advocacy (proposed)			\$ 11,782
Georgetown University	MA - Educational Transformation (Advocacy and Policy)	51,404.00	51,404.00	
New York University	Master of Public Administration (Advocacy and Political Action)	37,018.00	37,018.00	
Montclair State University	MA - Child Advocacy and Policy	12,410.00	12,410.00	14,960.00
Metropolitan State University	Masters in Advocacy and Political Leadership	9,147.20	17,552.60	10,952.80
Johns Hopkins University	Graduate certificate - Public Health Advocacy	21,546.00	21,546.00	
Georgetown University	Graduate certificate - Community Advocacy	31,770.00	31,770.00	
University of Southern California	Graduate certificate - Public Policy Advocacy	34,368.00	34,368.00	
Albany Law School	MS - Government Affairs and Advocacy	20,250.00	20,250.00	
American University	MA - Strategic Communication (Advocacy and Social Impact)			27,180.00

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee	\$	\$ 1,800.00
Number of Students	#	\$ 20
Total Revenue	=	\$ 36,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 6,120.00
Administrative Service Charge	\$	\$ 2,380.00
Instruction and student services	\$	\$ 22,000.00
Technology and operating	\$	\$ 5,500.00
	\$	
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 36,000.00



PROGRAM FEE REQUEST - NEW

University: Arizona State University College/School: W. P. Carey School of Business

Department: Dean's Office Program: Graduate Certificate in Marketing (Online)

Both Graduate Undergraduate

Resident: \$ 375 /credit Proposed Fee Effective Date: Fall 2021
 (this field you may enter other option just by typing it in box)

Non-Resident: \$ 375 /credit Proposed Fee Effective Date: Fall 2021
 (this field you may enter other option just by typing it in box)

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The Graduate Certificate in Marketing focuses on enhancing students' understanding of marketing and customer experience management by offering a portfolio of courses focused on key relevant topics including digital marketing, creating digital experiences and excelling at customer experience management. This certificate will be valuable for individuals who have earned a four year degree in business or outside of business, with at least some relevant work experience, who want to advance their understanding and skills related to marketing and customer experience management to further their careers. Students will benefit from an innovative online curriculum, engaging student experiences, and enhanced career services

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The fee revenue will support three general areas:
 Technology - appropriate hardware and software will be needed to ensure strong delivery of on-line course material
 Curriculum innovation – innovations in teaching excellence made possible by investments in faculty and faculty development
 Student experience and support – appropriate levels of student support staff; creating engaging student experiences involving industry specialists and experiential learning opportunities; enhanced career services with workshops augmented by digital resources

17% of the fee revenue will be set aside for financial aid.

The fee revenue will cover a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

Thirty-seven full-time MBA students who are concentrating in Marketing were invited to participate in a focus group. Six students participated, including both the student president and vice-president of the Strategic Marketing Club. The Marketing department chair, Dr. Douglas Olsen, provided information related to the purpose and course content of the proposed certificate. Assuming that appropriate quality parameters were in place, 100% of the students agreed that the program cost seems reasonable. They stressed that the program would benefit from experiential learning. These elements are unquestionably part of the proposed certificate, and will be underscored in courses offered.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	Online Marketing Certificate			\$ 13,978
University of Southern California	Graduate Cert in Marketing	33,000.00	33,000.00	
Colorado State University	Graduate Cert in Marketing Management			8,982.00
Boston University	Global Marketing Management Grad Cert	15,060.00	15,060.00	15,060.00
Penn State University	Graduate Cert in Marketing Analytics	12,552.00	12,552.00	12,552.00
Northeastern University	Graduate Certificate in Digital Marketing	19,680.00	196,860.00	19,680.00
Harvard Extension School	Graduate Certificate in Digital Marketing	11,600.00	11,600.00	11,600.00

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee	\$	\$ 5,626.00
Number of Students	#	\$ 20
Total Revenue	=	\$ 112,520.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 19,128.40
Administrative Service Charge	\$	\$ 7,940.00
Faculty Development, Curriculum Dev & Deliv	\$	\$ 28,130.00
Student and career services	\$	\$ 18,880.00
Operating and Technology expenses	\$	\$ 22,500.00
Recruitment and marketing	\$	\$ 15,941.60
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 112,520.00



PROGRAM FEE REQUEST - NEW

University: Arizona State University College/School: W. P. Carey School of Business
 Department: Dean's Office Program: Graduate Certificate in Real Estate

Both
 Graduate
 Undergraduate

Resident: \$ 375 /credit Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)
 Proposed Fee

Non-Resident: \$ 375 /credit Effective Date: Fall 2021
(this field you may enter other option just by typing it in box)
 Proposed Fee

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The Graduate Certificate in Real Estate encompasses all aspects of the business of real estate that are not covered in related disciplines such as architecture, construction, design, and urban planning and has been requested frequently by students in those courses of study. This certificate is focused on providing this additional opportunity for existing ASU degree-seeking students. This certificate will provide graduate students from other programs a way to enhance and supplement the work students perform in their specific programs. In addition, this certificate will allow students the ability to expand their scope of knowledge and skills to become more attractive to employers in their specific fields.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

- The fee revenue will be used to support:
- Technology,
 - Student services,
 - Classroom innovation,
 - Faculty and faculty development, and
 - 17% of the fee revenue will be set aside for financial aid.

This support will provide improved resources and guidance to students, enhanced research software, opportunity to attend the local Field Study tour, and enhanced career workshops augmented by digital resources.

The fee will cover a portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

A meeting was held with the current Master of Real Estate Development (MRED) students to discuss the purpose and curriculum for the Real Estate Graduate Certificate. There were 24 students in attendance. The MRED program is a partnership between W. P. Carey, Sandra Day O'Connor College of Law, the Herberger Institute for Design in the Arts, and the Del E. Webb School of Construction. Current MRED students have backgrounds similar to those that will be served by this certificate program, including Construction Management/Science, Environmental Design, Architectural Studies, Urban Planning, and Public Administration. Of the students who participated in the discussion, 21 or 87.5% of students expressed support for the new program and proposed fee.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	Graduate Certificate in Real Estate	\$ 18,233	\$ 27,441	
Fordham University	Advanced Graduate Certificates in Real Estate Finance, Construction Mgmt, and Property Management	20,775.00	20,775.00	20,775.00
University of Arizona	Graduate Certificates in Real Estate Analysis, Real Estate Finance and Real Estate Practice	11,319.00	22,455.12	10,306.00
American University	Graduate Certificate in Real Estate	20,208.00	20,208.00	
Portland State Univ	Graduate Certificate in Real Estate Development	11,475.00	17,150.00	17,150.00
University of Texas at San Antonio	Graduate Certificate in Real Estate Finance and Development	5,508.00	17,100.00	17,100.00
Baruch College	Graduate Online Certificate in Real Estate Finance			5,100.00
University of Cincinnati	Real Estate Graduate Certificate	11,520.00	11,520.00	
Drexel University	Graduate Certificate in Real Estate	24,174.00	24,174.00	24,174.00

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee	\$	\$ 6,000.00
Number of Students	#	\$ 5
Total Revenue	=	\$ 30,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 5,100.00
Administrative Service Charge	\$	
Career & Student Services	\$	\$ 8,400.00
Facilities, Technology, & Operations	\$	\$ 9,000.00
Faculty Development, Curriculum Dev & Deliv	\$	\$ 7,500.00
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 30,000.00



PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: W. P. Carey School of Business

Department: W. P. Carey School of Business Program: Master of Accountancy

Both
 Graduate
 Undergraduate

Resident:
 \$ 7,500 /semester
 \$ 8,500 /semester
 Effective Date: Fall
 2021
(this field you may enter other option just by typing it in box)

Non-Resident:
\$ 7,500 /semester
 \$ 8,500 /semester
 Effective Date: Fall
 2021
(this field you may enter other option just by typing it in box)

Program Fee History:		Most Recent Date & Change to fee (Date/Amount)	
Resident:			
Date Fee Established	<u>Fall</u> <u>1997</u>	and original amount <u>\$ 3,500</u>	<u>Fall</u> <u>2018</u> <u>\$ 7,500</u>
			Most Recent Date & Change to fee (Date/Amount)
Non-Resident:			
Date Fee Established	<u>Fall</u> <u>1997</u>	and original amount <u>\$ 3,500</u>	<u>Fall</u> <u>2018</u> <u>\$ 7,500</u>

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	_____	_____
Number of classes within the program with a fee:	_____	_____
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The Master of Accountancy (MACC) program prepares students to excel in highly competitive industries. The MACC delivers in-depth knowledge of advanced accounting challenges and equips students to provide specialized advisory services. Students in the program will benefit from a high level of career services, as nearly 100 percent of domestic graduates are employed within 90 days of graduation and successfully completes requirements for the CPA exam and licensure in Arizona and California. Substantial improvements will be made to this program for Fall 2021. The program will now have more and improved data analytics coverage, will include explicit preparation for the CPA Exam, and will allow students more flexibility in tailoring their coursework.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The fee revenue will support:

- A dedicated career placement service, with networking opportunities to ensure the best placement outcomes for the students;
- Student services, advisory and technology staff;
- Investments in faculty, technology, and facilities;
- Designated financial aid counselors that provide a full-range of financial aid knowledge and assistance. This improves access and ensures that the program attracts highly qualified applicants; and
- 17% of the program fee is set-aside for scholarship support.

The fee revenue covers of portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

Student feedback on the proposed fee increase was solicited via a focus group of current MACC students, moderated by the faculty director and School of Accountancy clinical professor, Dr. Philip Drake. During the session, Dr. Drake provided updates on the improvements to the program, including the curricular enhancements and the partnership with a professional provider for exam preparation. A total of 41 students were invited and 38 students attended this session via Zoom; 36 (95%) students were supportive of the the proposed fee increase. The students were overwhelming supportive of the CPA focus initiatives as well as the other proposed improvements.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	Master of Accountancy	\$ 27,608	\$ 47,288	
University of Arizona	Master of Accounting	24,544.00	44,894.00	30,052.00
University of California, Irvine	Master of Professional Accountancy	23,460.00	47,610.00	
University of Southern California	Master of Accounting	61,723.00	61,723.00	
University of Illinois	Master of Science in Accounting	39,100.00	39,100.00	27,200.00
University of Michigan	Master of Accounting	49,000.00	54,000.00	
Ohio State University	Master of Accounting	32,883.00	57,599.00	
Brigham Young University	Master of Accountancy - Professional	27,720.00	27,720.00	
University of Utah	Master of Accounting	29,100.00	54,210.00	
University of Texas, Austin	Traditional Master in Professional Accounting	40,302.00	64,849.00	
University of New Mexico	Master of Accounting	16,760.00	37,405.00	
University of North Carolina - Chapel Hill	Master of Accounting	45,472.00	66,444.00	69,425.00
University of Washington	Master of Professional Accounting	21,999.00	27,300.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 17,000.00
Number of Students	#	\$ 100
Total Revenue	=	\$ 1,700,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 289,000.00
Administrative Service Charge	\$	
Admissions, Career & Student Services	\$	\$ 476,000.00
Facilities, Technology Marketing & Operations	\$	\$ 510,000.00
Faculty Development, Curriculum Dev & Delivery	\$	\$ 425,000.00
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 1,700,000.00



PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: W. P. Carey School of Business

Department: W. P. Carey School of Business Program: Master of Taxation

Both
 Graduate
 Undergraduate
 Upper Division
 Choose One Option

Resident:
 \$ 7,500 /semester
 \$ 8,500 /semester
 Effective Date: Fall
 2021
(this field you may enter other option just by typing it in box)

Non-Resident:
 \$ 7,500 /semester
 \$ 8,500 /semester
 Effective Date: Fall
 2021
(this field you may enter other option just by typing it in box)

Program Fee History:		Most Recent Date & Change to fee (Date/Amount)	
Resident:			
Date Fee Established	Fall 1997 and original amount	<u>\$ 3,500</u>	Fall 2018 <u>\$ 7,500</u>
Non-Resident:			
Date Fee Established	Fall 1997 and original amount	<u>\$ 3,500</u>	Fall 2018 <u>\$ 7,500</u>

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	_____	_____
Number of classes within the program with a fee:	_____	_____
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The Master of Taxation (MTax) program prepares students to excel in highly competitive industries. The MTax program equips students to provide tax and business advice and administer tax laws, as well as delivers in-depth knowledge of advanced accounting challenges related to taxation. Students in the program will benefit from a high level of career services, as nearly 100 percent of domestic graduates are employed within 90 days of graduation and successfully completes requirements for the CPA exam and licensure in Arizona and California. Substantial improvements will be made to this program for Fall 2021. The program will now have more and improved data analytics coverage, will include explicit preparation for the CPA Exam, and will allow students more flexibility in tailoring their coursework. T

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

- The fee revenue will support:
- A dedicated career placement service, with networking opportunities to ensure the best placement outcomes for the students;
 - Student services, advisory and technology staff;
 - Investments in faculty, technology, and facilities;
 - Designated financial aid counselors that provide a full-range of financial aid knowledge and assistance. This improves access and ensures that the program attracts highly qualified applicants; and
 - 17% of the program fee is set-aside for scholarship support.

The fee revenue covers of portion of the costs to offer the program.

Student Consultation (Please describe the method and outcomes of student consultation)

Student feedback on the proposed fee increase was solicited via a focus group of the current MTAX students, moderated by the faculty director and School of Accountancy clinical professor, Dr. Philip Drake. During the session, Dr. Drake provided updates on the improvements to the program, including the curricular enhancements, partnership with a professional provider for exam preparation. 24 students attended this session via Zoom and were supportive of the the proposed fee increase.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Arizona State University	Master of Taxation	\$ 27,608	\$ 47,288	
Brigham Young University	Master of Accountancy - Tax	27,720.00	27,720.00	
University of Southern California	Master of Business Taxation	61,723.00	61,723.00	
University of Utah	Master of Accounting, Tax Track	29,100.00	54,210.00	
University of California, Irvine	Master of Professional Accountancy, Tax Track	47,610.00	47,610.00	
University of Arizona	Master of Accounting, Taxation	24,544.00	44,898.00	
University of Texas, Austin	Traditional Master in Professional Accounting	40,302.00	64,849.00	
University of New Mexico	Master of Accounting	16,760.00	37,405.00	
University of North Carolina - Chapel Hill	Master of Accounting	45,472.00	66,444.00	69,425.00
University of Minnesota Twin Cities	Master of Business Taxation	43,000.00	43,000.00	
University of Maryland College Park	Master of Science in Accounting, Tax Track	48,483.00	61,472.00	
University of Washington Seattle	Master of Science in Tax	25,000.00	27,381.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 17.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 17,000.00
Number of Students	#	\$ 35
Total Revenue	=	\$ 595,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 101,150.00
Administrative Service Charge	\$	
Admissions, Career and Student Services	\$	\$ 166,600.00
Facilities, Technology, Marketing & Operations	\$	\$ 178,500.00
Faculty Development, Curriculum Dev & Delivery	\$	\$ 148,750.00
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 595,000.00



OTHER FEE REQUEST - NEW

University: Arizona State University College/School: Sandra Day O'Connor College of Law
 Department: _____ Program: Master of Sports Law and Business MSLB
 Both Graduate Undergraduate Upper Division Choose One Option

Fee Amount: \$ 500 /semester Effective Date of Change: Fall 2021
 Proposed Fee (this field you may enter other option just by typing it in box)

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The Sandra Day O'Connor College of Law JD program has a seat deposit and the requirement of a deposit has proven to be a success in securing enrollment and enabling the program director to better manage the curriculum delivery and program costs. The deposit will be applied to the program fee for those students who are admitted and attend the program.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The deposit will be applied to the program fee for those students who are admitted and attend the program. The deposits from the students that decline the offer will be used for student support, admissions, technology, dedicated classrooms, orientation and other value-add academic experiences.

Student Consultation (Please describe the method and outcomes of student consultation)

A survey was sent out on 1/22/2021 to 80 current MSLB students. 21 students responded to the survey. Out of the students that responded to the survey, 71% expressed support for the fee proposal.

Proposed Annual Revenue

Other Fee Amount	\$	\$ 500.00
Number of Students	#	50
Total Revenue	=	\$ 25,000.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 2,000.00
Student Support Services	\$	\$ 23,000.00
	\$	
	\$	
Total Expenditures	=	\$ 25,000.00



MANDATORY FEE REQUEST - CHANGE TO EXISTING

University: Arizona State University College/School: _____
 Department: Student Services Program: Undergraduate Student Programs Fee
 Both Graduate Undergraduate Both Choose One Option

\$ 30 /semester \$ 35 /semester Effective Date of Change: Fall 2021
 Current Fee Proposed Fee (this field you may enter other option just by typing it in box)

Other Fee History:
 Date Established Fall 2008 and original amount \$ 25
 Most Recent Date and Change to fee (Date/Amount) Fall 2016 \$ 30

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

Currently, undergraduate students pay \$30/semester to support a range of programming initiatives, clubs and organizations.

With the addition of hundreds of new clubs, sports clubs, events, and cultural celebrations, students in Undergraduate Student Government will use the incremental fee revenue to support the increased demand for student engagement programs. This includes funding to support large scale programming initiatives, cultural programming, student clubs and organizations, events, and activities.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The incremental annual revenue generated by this \$5/semester increase will be utilized to support increased levels of student engagement, student population growth, and the increased demand for a diverse range of student programming. Program priorities include funding clubs and organizations and large scale events that bring together the Sun Devil student community.

Student Consultation (Please describe the method and outcomes of student consultation)

Undergraduate Student Government leaders and their Senate representatives sought feedback regarding the potential need for a fee increase from their constituents beginning in the Fall 2019 semester. In an All Senate Meeting held November 2019, the Senate proposed the fee increase and discussed the various amounts of a potential fee increase. They advanced these conversations into the Spring 2020 semester. Through various conversations and meetings, they debated the need to provide greater support to ASU clubs and organizations and to fund large-scale programming efforts that bring together the Sun Devil community and help students feel connected. Student leaders worked together to create a list of student initiatives this fee increase would support. The final meeting was held on February 20, 2020. With the support of their Senates, the majority of USG Senate Presidents and USG Student Body Presidents voted to advance a \$5 increase per semester. Note: In Spring 2020, Undergraduate Student Government recommended that the fee be deferred to Fall 2021 due to the public health crisis and ensuing financial uncertainty. Current Undergraduate Student Government was consulted to garner additional input for moving forward with a Fall 2021 implementation.

Proposed Annual Revenue

Other Fee Amount	\$	\$ 10.00
Number of Students	#	60,000
Total Revenue	=	\$ 600,000.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 51,000.00
Programming Support for clubs and organizations	\$	\$ 549,000.00
	\$	
	\$	
Total Expenditures	=	\$ 600,000.00

ASU EXISTING DIFFERENTIAL TUITION and PROGRAM FEES SUMMARY

DATE ESTABLISHED	COLLEGE/ SCHOOL	PROGRAM	GR/UNDER	AMOUNT	EST. ANNUAL REVENUE \$ 20-21
COLLEGE FEES					
December 2007	Journalism	Cronkite Graduate Programs	Graduate	\$1,000/semester	205,000.00
April 2013	Law	Juris Doctorate	Graduate	\$7,725 (Resident) \$7,507 (Non-resident)	11,964,000.00
PROGRAM FEES					
DATE ESTABLISHED	COLLEGE/ SCHOOL	PROGRAM	GR/UNDER	AMOUNT	EST. ANNUAL REVENUE \$ 20-21
April 2011	Business	Master of Real Estate Development	Graduate	\$13,125/semester	682,500.00
April 2018	Business	MS Taxation MS Accountancy	Graduate	\$7,500/semester	1,779,000.00
April 2005	Business	Non-majors enrolled in business courses	Graduate	\$500/credit	16,500.00
April 2017	Business	Non-majors Taking Masters in Management Online Courses	Graduate	\$70/Credit (Online)	16,500.00
March 2006	Business	W.P. Carey MBA: Corporate	Graduate	\$1,104/credit	0.00
April 2011	Business	W.P. Carey MBA: Evening W.P. Carey MBA: Full-time W.P. Carey MBA: Online	Graduate	\$677/credit - \$16,250/year \$17,000/year \$704/credit - \$16,250/year	10,132,700.00
April 2011	Business	W.P. Carey MBA: Executive	Graduate	\$14,750/semester	1,777,300.00
April 2013	Business	Master Business Analytics	Graduate	\$10,500/semester	2,355,700.00
April 2014	Business	Master Business Analytics - Online	Graduate	\$800/credit - \$12,000/semester	960,400.00
April 2018	Business	Master Finance	Graduate	\$12,500/semester	1,700,000.00
April 2014	Business	Master Global Logistics	Graduate	\$11,000/semester	1,056,000.00
December 2008	Business	Master in Management	Graduate	\$417/credit - \$7,500/semester	0
April 2011	Business	Master Science Information Management-Online	Graduate	\$508/credit	0
April 2011	Business	Master Science Information Management-Tempe	Graduate	\$6,100/semester	360,000.00
April 2019	Business	Supply Chain Management - Online	Graduate	\$11,000/semester	121,300.00
April 2011	Design and the Arts	Master of Architecture	Graduate	\$2,425/semester	611,300.00
December 2008	Design and the Arts	Master of Healthcare Environmental Design	Graduate	\$2,500/semester	0.00
April 2011	Design and the Arts	Master of Industrial Design	Graduate	\$2,425/semester	180,000.00
April 2011	Design and the Arts	Master of Interior Architecture	Graduate	\$2,425/semester	132,000.00
April 2011	Design and the Arts	Master of Landscape Architecture	Graduate	\$2,425/semester	43,400.00
April 2011	Design and the Arts	Master of Urban Design	Graduate	\$2,425/semester	0.00
April 2011	Design and the Arts	Master of Visual Communication Design	Graduate	\$2,425/semester	123,800.00
March 2006	Design and the Arts	Master Science Design	Graduate	\$500/semester	10,700.00
March 2006	Design and the Arts	MS Building Design (Built Environment)	Graduate	\$1,625/semester	6,100.00
April 2019	Design and the Arts	MS in Innovation and Venture Development	Graduate	\$270/credit - \$4,000/semester	260,000.00
April 2013	Design and the Arts	Master of Arts	Graduate	\$400/semester	284,800.00
April 2004	Engineering	Engineering Graduate programs - Online ASU Managed	Graduate	\$402/credit	2,805,500.00
April 2005	Engineering	Engr Graduate Programs, except online	Graduate	\$450/semester	2,667,600.00
April 2005	Engineering	Engr Graduate Programs, Online - PRS Managed	Graduate	\$1,300/semester (Online - PRS Managed)	128,700.00
March 2010	Engineering	MS in Engineering Entrepreneurship & Innovation	Graduate	\$1,250/credit	0.00
May 2015	Engineering	MS Software Engineering	Graduate	\$450/semester	0.00
April 2013	Engineering	MS Supply Chain Mgt & Eng	Graduate	\$6,250/semester	0.00
March 2010	Engineering	PSM in Solar Energy and Commercialization	Graduate	\$500/credit	21,000.00
December 2008	Engineering	PSM Science, Engineering, and Technology Management	Graduate	\$500/credit	0.00
December 2008	Future of Innovation in Society	Masters of Science and Technology Policy	Graduate	\$250/credit	0.00
December 2008	Graduate College	MS Translational Neuroscience	Graduate	\$250/credit	0.00
May 2015	Health Solutions	ASU Dietetic Internship Program	Graduate	\$1,000/semester	9,000.00
April 2019	Health Solutions	Audiology Assistant Certificate	Graduate	\$250/semester	0.00
April 2018	Health Solutions	Auditory and Language Neuroscience MS	Graduate	\$500/semester	16,500.00
April 2014	Health Solutions	Biomedical Diagnostics	Graduate	\$225/credit - \$2,000/semester \$222/credit (Online)	258,300.00
April 2017	Health Solutions	Communication Sciences & Disorders Certificate (Post-Bacc)	Undergraduate	\$125/credit	49,200.00
December 2008	Health Solutions	DBH Behavioral Health	Graduate	\$5,000/semester	2,302,100.00
March 2010	Health Solutions	Doctorate in Audiology	Graduate	\$1,200/semester	99,000.00
April 2017	Health Solutions	Health Care Delivery Certificate	Graduate	\$350/credit (Online)	2,100.00
April 2017	Health Solutions	Integrated Behavioral Health (Clinical and Management Tracks) Certificate	Graduate	\$556/credit (Online)	16,600.00
March 2010	Health Solutions	Master of Advanced Study in Health Informatics	Graduate	\$350/credit (Online)	471,700.00
April 2016	Health Solutions	Master of Integrated Health Care	Graduate	\$2,000/semester	0.00
April 2018	Health Solutions	Master of International Health Management	Graduate	\$272/credit (Online)	124,576.00
April 2016	Health Solutions	Master of Science in Biomedical Informatics	Graduate	\$2,000/semester	67,300.00
March 2010	Health Solutions	Master of Science in Communications Disorders	Graduate	\$800/semester	147,000.00
April 2018	Health Solutions	Medical Nutrition MS	Graduate	\$222/credit and \$2,000/semester (Online)	350,300.00
April 2017	Health Solutions	MS Biomechanics	Graduate	\$1,600/semester	0.00
April 2012	Health Solutions	MS Healthcare Delivery	Graduate	\$2500/semester	714,000.00
April 2018	Health Solutions	Multicultural Multilingual Communication Certificate	Graduate	\$300/semester	3,000.00
April 2018	Health Solutions	Science of Health Care Delivery Certificate	Graduate	\$350/credit	0.00
April 2014	Health Solutions	SNHP Graduate	Graduate	\$500/semester \$180/credit (Online)	225,100.00
March 2010	Health Solutions	Speech - Language Pathology Assistant Certificate	Graduate	\$250/credit	7,500.00
March 2010	Honors College	Barrett Honors College Fee	Undergraduate	\$1000/semester	13,583,600.00
April 2011	Integrative Sciences and Arts	MS Counseling	Graduate	\$300/semester	488,700.00
April 2019	Integrative Sciences and Arts	MS Organizational Leadership - Immersion	Graduate	\$160/Credit	57,100.00
April 2019	Integrative Sciences and Arts	MS Organizational Leadership - Online	Graduate	\$160/Credit	295,100.00
April 2018	Integrative Sciences and Arts	MS Technical Communication (LSTCCMMS) Online	Graduate	\$25/Credit (Online)	13,800.00
April 2018	Journalism	Graduate Certificate Digital Audiences	Graduate	\$100/credit (Online)	30,300.00
April 2018	Journalism	Master of Science Digital Audience Strategy	Graduate	\$100/credit (Online)	501,400.00
April 2014	Law	Master of Laws (MLS) Online	Graduate	\$558/credit	4,629,000.00
April 2012	Law	Master of Laws LLM	Graduate	\$8,375/semester	217,200.00
April 2012	Law	Master of Laws/Legal Studies (Res) Master of Laws/Legal Studies (Non-Res)	Graduate	\$15,600/semester FT and \$1,400/credit PT \$19,600/Semester and \$1,700/credit PT \$1,014/credit resident \$1,200/credit non-resident	1,026,125.00
May 2015	Law	MLS Sports Law Business	Graduate		401,400.00
April 2018	Liberal Arts & Sciences	Applied Prevention Science Graduate Certificate	Graduate	\$137/credit (Online)	77,000.00
April 2018	Liberal Arts & Sciences	Graduate Certificate in Addiction and Substance Use Related Disorders	Graduate	\$100/credit (Online)	74,300.00
April 2019	Liberal Arts & Sciences	International Affairs and Leadership	Graduate	\$278/credit	0.00
April 2017	Liberal Arts & Sciences	M. in Teaching English to Speakers of Other Languages	Graduate	\$225/Credit (Online)	185,100.00
April 2017	Liberal Arts & Sciences	M.A. in Communication - Online	Graduate	\$87/Credit (Online)	332,400.00
April 2017	Liberal Arts & Sciences	M.A. in English	Graduate	\$70/Credit (Online)	229,800.00
April 2017	Liberal Arts & Sciences	M.A. in Global Security	Graduate	\$250/Credit (Online)	564,900.00
December 2008	Liberal Arts & Sciences	MA Applied Ethics & the Professions	Graduate	\$350/credit hour (\$10,500 for 30 credits executive track)	0.00
April 2016	Liberal Arts & Sciences	MA History - Online	Graduate	\$40/credit (Online)	116,900.00
April 2019	Liberal Arts & Sciences	MA in Political Psychology - Online	Graduate	\$100/credit	97,700.00
April 2018	Liberal Arts & Sciences	MA Indigenous Education	Graduate	\$40/credit (Online)	15,700.00
December 2008	Liberal Arts & Sciences	MAS American Media and Popular Culture	Graduate	\$250/course	48,700.00
April 2004	Liberal Arts & Sciences	MAS Geographical Information Systems	Graduate	\$400/credit	187,200.00
December 2007	Liberal Arts & Sciences	MAS Infant Family Practice	Graduate	\$300/credit	0.00
December 2007	Liberal Arts & Sciences	MAS Marriage and Family Therapy	Graduate	\$475/credit	299,700.00
April 2011	Liberal Arts & Sciences	MAS Transborder Studies	Graduate	\$250/credit	0.00
December 2008	Liberal Arts & Sciences	Master of Advanced Study in Screenwriting	Graduate	\$250/semester	0.00
May 2015	Liberal Arts & Sciences	Master of Applied Behavioral Analysis	Graduate	\$2,500/semester	269,400.00
April 2018	Liberal Arts & Sciences	Master of Arts, World War II Studies	Graduate	\$120/credit (Online)	266,100.00
April 2005	Liberal Arts & Sciences	Master of Liberal Studies	Graduate	\$200/credit	175,000.00
April 2011	Liberal Arts & Sciences	Master of Urban & Environmental Planning	Graduate	\$1,250/semester	179,300.00
December 2007	Liberal Arts & Sciences	MS Biochemistry	Graduate	\$300/semester	2,700.00
April 2018	Liberal Arts & Sciences	MS Global Health	Graduate	\$125/credit (Online)	0.00
April 2011	Liberal Arts & Sciences	PSM Nanotechnology	Graduate	\$1,000/semester FT and \$500/semester PT	1,500.00
April 2019	New Interdis Arts & Sciences	MS Biological Data Science	Graduate	\$240/Credit	58,300.00

ASU EXISTING DIFFERENTIAL TUITION and PROGRAM FEES SUMMARY

DATE ESTABLISHED	COLLEGE/ SCHOOL	PROGRAM	GR/UNDER	AMOUNT	EST. ANNUAL REVENUE \$ 20-21
April 2017	New Interdis Arts & Sciences	MS Forensic Psychology	Graduate	\$100/credit (Online)	902,300.00
April 2019	New Interdis Arts & Sciences	MS Forensic Science	Graduate	\$100/credit (Online)	157,600.00
March 2010	New Interdis Arts & Sciences	MS Psychology	Graduate	\$31/credit \$100/credit (Online)	564,700.00
April 2019	New Interdis Arts & Sciences	Social Justice and Human Rights	Graduate	\$100/credit (Online)	116,200.00
December 2007	Nursing and Health	Doctor of Nursing Practice	Graduate	\$2,500/semester	1,091,400.00
December 2007	Nursing and Health	Master of Healthcare Innovation	Graduate	\$2,000/semester	336,700.00
March 2010	Nursing and Health	Master of Public Health	Graduate	\$2,500/semester	0.00
December 2007	Nursing and Health	MS Clinical Research Management	Graduate	\$250/credit (maximum \$2,000)	427,800.00
April 2005	Nursing and Health	MS Nursing	Graduate	\$750/semester	49,300.00
April 2005	Nursing and Health	MS Aging	Graduate	\$84/credit (maximum \$750) (Online)	6,300.00
April 2019	Nursing and Health	MS Nursing Entry to Practice	Graduate	\$306/credit and \$2750/semester	397,200.00
December 2007	Nursing and Health	Nursing Graduate Certificates	Graduate	\$250/credit (maximum \$2,000)	50,500.00
December 2007	Nursing and Health	PhD in Nursing and Healthcare Innovation	Graduate	\$2,000/semester	101,400.00
March 2010	Nursing and Health	Second Degree Students Pursing BSN	Undergraduate	\$5,500/semester	660,000.00
April 2011	Public Serv and Comm Sol	Cert in NP Leadership Mgt Comm Research/Development	Graduate	\$300/semester	1,800.00
December 2008	Public Serv and Comm Sol	Certificate in Trauma and Bereavement	Graduate	\$500 one time fee	0.00
April 2016	Public Serv and Comm Sol	Executive Master of Public Administration	Graduate	\$530/credit and \$3,180/semester	57,200.00
April 2017	Public Serv and Comm Sol	M.A. in Criminal Justice	Graduate	\$100/credit (Online)	266,600.00
April 2019	Public Serv and Comm Sol	MA Emergency Management & Homeland Security	Graduate	\$150/credit	0.00
April 2014	Public Serv and Comm Sol	MA Emergency Management & Homeland Security - Online	Graduate	\$100/credit (Online)	547,000.00
April 2011	Public Serv and Comm Sol	Master NonProfit Std Comm Resources/Development	Graduate	\$350/semester	84,400.00
April 2017	Public Serv and Comm Sol	Master of NP Leadership Mgt - Online	Graduate	\$100/credit (Online)	26,100.00
April 2011	Public Serv and Comm Sol	Master of Public Administration	Graduate	\$1,667/semester \$5,000 Max	319,700.00
April 2011	Public Serv and Comm Sol	Master of Public Policy	Graduate	\$1,667/semester \$5,000 Max	125,300.00
April 2016	Public Serv and Comm Sol	Master of Public Safety Leadership and Administration	Graduate	\$660/semester \$100/credit (Online)	143,900.00
March 2010	Public Serv and Comm Sol	Master of Social Work	Graduate	\$650/semester \$200/credit (Online)	3,979,000.00
April 2017	Public Serv and Comm Sol	Master of Sustainable Tourism	Graduate	\$25/credit (Online)	15,800.00
April 2018	Public Serv and Comm Sol	MS Program Evaluation & Data Analytics	Graduate	\$100/credit (Online)	89,000.00
Spring 2015	Global Futures	Biomimicry Certificate	Graduate	\$268/credit	18,700.00
Spring 2015	Global Futures	Biomimicry MS	Graduate	\$268/credit	200,400.00
April 2013	Global Futures	Executive MS in Sustainability Leadership	Graduate	\$419/credit (Reduced from \$20,000 for program)	172,200.00
April 2019	Global Futures	Graduate Certificate - Food Policy and Sustainability Leadership	Graduate	\$272/credit	40,700.00
April 2015	Global Futures	MS in Sustainability Leadership - Online	Graduate	\$208/credit	456,700.00
May 2020	Global Futures	MS in Sustainable Food Systems - Online	Graduate	\$255/credit	23,200.00
April 2016	Teachers College	Advanced Analytics in Higher Ed Cert	Graduate	\$63/credit (Online)	5,900.00
May 2015	Teachers College	EdD Leadership and Innovation - Online	Graduate	\$183/credit (Online)	427,100.00
December 2008	Teachers College	M.Ed. Curriculum & Instruction (Elementary, Early Childhood, Secondary)	Graduate	\$500/semester (maximum of \$1,000)	172,100.00
April 2013	Teachers College	M.Ed. Curriculum & Instruction (Elementary, Early Childhood, Secondary) - Online	Graduate	\$73/credit (Online)	2,944,300.00
April 2017	Teachers College	ME.d Educational Leadership	Graduate	\$42/credit	28,300.00
May 2015	Teachers College	ME.d Higher and Postsecondary Education	Graduate	\$700/semester	61,000.00
	Thunderbird	Executive Master of Arts in Global Affairs and Management	Graduate	\$2000/credit Inclusive of Tuition (60,000 Program Max - Combined Tuition and Program Fees)	557,000.00
May 2015	Thunderbird	Executive Master of Global Management	Graduate	\$2125/credit Inclusive of Tuition (85,000 Program Max - Combined Tuition and Program Fees)	1,005,400.00
May 2015	Thunderbird	Graduate Certificate (ASU)	Graduate	\$700/credit	0.00
May 2015	Thunderbird	Graduate Certificate (Non-ASU)	Graduate	\$1,000/credit	0.00
May 2015	Thunderbird	MA Global Affairs & Management	Graduate	\$1,333/credit Inclusive of Tuition (60,000 Program Max - Combined Tuition and Program Fees)	0.00
April 2018	Thunderbird	Master of Applied Leadership and Management	Graduate	\$1110/credit (Online) Inclusive of Tuition (33,300 Program Max - Combined Tuition and Program Fees)	2,209,300.00
April 2019	Thunderbird	Master of Global Leadership Strategy	Graduate	\$4167/credit Inclusive of Tuition (125,000 Program Max - Combined Tuition and Program Fees)	0.00
May 2015	Thunderbird	Master of Global Management, Full Time	Graduate	\$1,750/credit Inclusive of Tuition (70,000 Program Max - Combined Tuition and Program Fees)	5,892,200.00
May 2015	Thunderbird	Online Master of Global Management	Graduate	\$975/credit Inclusive of Tuition (42,000 Program Max - Combined Tuition and Program Fees)	148,500.00

UNDERGRADUATE COLLEGE FEES

DATE ESTABLISHED	COLLEGE/ SCHOOL	PROGRAM	GR/UNDER	AMOUNT	EST. ANNUAL REVENUE \$ 20-21
Apr-19	Integrative Sciences and Arts, New College of Interdisciplinary Arts and Sciences (Sciences), Future of Innovation in Society, Sustainability, The College (Humanities and Social Sciences), Public Serv and Comm	Undergraduate College Fee 2 - Immersion	Undergraduate	\$180/semester FT and \$15/credit PT (NonResident) \$105/semester FT and \$15/credit PT (Resident)	2,623,400.00
Apr-19	Health Solutions, Nursing, Design and The Arts	Undergraduate College Fee 3 - Immersion	Undergraduate	\$660/semester FT and \$55/credit PT (NonResident) \$385/semester FT and \$55/credit PT (Resident)	8,626,800.00
Apr-19	Engineering, The College (Sciences), Thunderbird, Journalism, Business	Undergraduate College Fee 4 - Immersion	Undergraduate	\$900/semester FT and \$75/credit PT (NonResident) \$525/semester FT and \$75/credit PT (Resident)	43,465,200.00
May-20	Nursing BSN and Non-degree	Undergraduate College Fee 1 Online	Undergraduate	\$20/credit	393,800.00
May-20	Integrative Sciences and Arts (Humanities and Social Sciences), University College (Humanities and Social Sciences) The College (Humanities and Social Sciences), Design and The Arts, New College of Interdisciplinary Arts and Sciences (Humanities and Social Sciences)	Undergraduate College Fee 2 - Online	Undergraduate	\$40/credit	13,289,200.00
May-20	Integrative Sciences and Arts (Sciences), University College (Sciences), New College of Interdisciplinary Arts and Sciences (Sciences), The College (Sciences), Nursing, Sustainability, Public Serv and Comm, Global Futures	Undergraduate College Fee 3 - Online	Undergraduate	\$60/credit	9,601,600.00
May-20	Health Solutions, Journalism, Engineering, Thunderbird, Business	Undergraduate College Fee 4 - Online	Undergraduate	\$120/credit	30,449,200.00

Arizona State University

Student Housing

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ARIZONA STATE UNIVERSITY HOUSING RATE REQUESTS

Arizona State University requests approval to set 2021-2022 Residence Hall rates at an average increase of 2.25% over prior year.

- The development of room and board rates at Arizona State University involves residential students and elected (RHA) student leaders on each campus. The objective is to ensure the educational, programmatic and service support necessary to meet students' needs and enhance their academic and personal success.
- Room and board rates are established with the goal of providing affordable, high quality learning environments. To this end, ASU offers a wide range of accommodations to meet the diverse needs of the student body. Monthly housing rates range from \$690 - \$1,227 per month to accommodate a broad level of needs and preferences. All environments, independent of location or cost, are supported with a commensurate level of academic and student support services to assist each student in achieving their educational potential.
- University Housing continues to make repairs and renovations necessary to address deferred maintenance, including ADA/accessibility, building integrity, functionality, life safety and energy conservation. Requested rate increases will allow for continued progress in responding to these ongoing concerns in addition to addressing an anticipated increase in utilities.
- Projected room and board rate increases have been reviewed and received majority support by the leadership of the Residence Hall Association with the outlying exception of board rates at the Downtown campus. Polytechnic RHA 's executive leadership drafted a letter of support despite select new constituents of their assembly voting against.
- Rates for ASU related entities are provided for informational purposes.

Arizona State University
 Residential Life
 AY 2021-2022

Student Housing Rate Recommendations

Room Configuration	AY 20/21	AY 21/22	Avg % Change	Avg \$ Change
Common Bath Style	\$6,460	\$6,608	2.29%	\$148
Suite Style - Double Type A	\$6,720	\$6,870	2.23%	\$150
Suite Style - Double Type B	\$7,240	\$7,400	2.21%	\$160
Apartments				
2 Bedroom	\$7,860	\$8,040	2.29%	\$180
4 Bedroom	\$7,600	\$7,772	2.26%	\$172
Polytechnic Housing				
Residence Halls - Double	\$5,400	\$5,522	2.25%	\$122
Residence Halls - Private	\$6,420	\$6,564	2.24%	\$144
Family Houses - NDV Unfurnished 2 Bedroom/2 Bath	\$10,260	\$10,490	2.24%	\$230
Average Increase			2.25%	\$163

Notes:

- 1) The proposed rates are per person, per academic year unless otherwise noted.
- 2) Common Bath Style is Hayden, Best and Irish Halls.
- 3) Suite Style Double configuration is 4 students in 2 bedrooms with a shared bath (Type A - PV East & PV West)
(Type B - Adelphi Commons, San Pablo & Sonora)
- 4) Apartments are available for continuing students only. (2 Bedroom Towers, 4 Bedroom Las Casas)
- 5) The Residence Hall Association (RHA) charge of \$50 per academic year will be added to the above rates to support Residence Hall Student Government cultural, educational and social programming.
- 6) A \$49 per semester residential college fee will apply to all residents in a residential college.
- 7) Poly Houses and Las Casas display the least expensive of the many configurations available.

Arizona State University

Residential Life
 AY 2021-2022

Student Housing Rates - ASU Related Entities
 (Information Only)

Facility	FY 20/21	FY 21/22	Avg % Change	Avg \$ Change
Barrett Honors College - 2 Bedroom/1 Bath	\$8,830	\$9,096	3.01%	\$266
Tooker 2x2 Double	\$8,714	\$8,976	3.01%	\$262
Vista del Sol - 4 Bedroom/4 Bath – 11.5 months	\$10,108	\$10,412	3.01%	\$304
Hassayampa Academic Village	\$8,240	\$8,488	3.01%	\$248
Manzanita	\$8,600	\$8,858	3.00%	\$258
Casa De Oro	\$6,922	\$7,130	3.00%	\$208
Taylor Place - Tower I Doubles	\$9,630	\$9,822	1.99%	\$192
Century - Double	\$8,360	\$8,568	2.49%	\$208
GLV - Double	\$8,372	\$8,624	3.01%	\$252
Lantana Hall	\$9,600	\$9,770	1.77%	\$170
ASU Related Entities Average Increase			2.73%	\$237

Notes:

- 1) The proposed rates are per person, per academic year unless otherwise noted.
- 2) The Residence Hall Association (RHA) charge of \$50 per academic year will be added to the above rates to support Residence Hall Student Government cultural, educational and social programming.
- 3) A \$49 per semester residential college fee will apply to all residents in a residential college.
- 4) Barrett, Vista, Manzanita, Tooker and Taylor Place halls display the most common of many room types available.

ARIZONA STATE UNIVERSITY MEAL PLAN RATE REQUEST

Arizona State University requests approval to increase required board plans by an average of 1.50% across all meal plans

- Aramark team members and the university review the findings of the *Your Dining Voice.com* electronic survey and review the findings on a semesterly basis
- The proposed increase takes into account the increase in food costs as reported by the November 2020 Consumer Price Index for Food Away from Home; additional operating and programming expenditures, increases in natural gas and electric prices and worker wages.
- Letters of support from the Residence Hall Association are attached. Downtown RHA was the only group not in support of rate increases.

Arizona State University

Residential Life

AY 2021-2022

Student Board Rate Recommendations

	AY 20/21	AY 21/22	% Change	Annual \$ Change
Meal Plan				
All Campus Meal Plans				
Gold - 7 meals/week w/ \$300 M&G (FTF)*	\$3,090	\$3,150	1.94%	\$60
Maroon - 10 Meals/week w/ \$600 M&G	\$4,570	\$4,660	1.97%	\$90
Sparky's - 14 meals/week w/ \$400 M&G	\$5,360	\$5,470	2.05%	\$110
Unlimited - (7 days/week) w/ \$275 M&G	\$5,700	\$5,810	1.93%	\$110
All M&G (Upper-Class only)*	\$2,320	\$2,370	2.16%	\$50
Average Increase Traditional Meal Plans			2.01%	\$84
Barrett Meal Plans (Tempe Campus Only)				
Barrett Maroon 7 meals/week w/ \$375 M&G (Upperclass only)	\$4,390	\$4,440	1.14%	\$50
Barrett Silver 10 meals/week w/ \$225 M&G (FTF)*	\$6,010	\$6,060	0.83%	\$50
Barrett Platinum 14 meals/week w/ \$400 M&G	\$6,680	\$6,730	0.75%	\$50
Barrett Unlimited - (7 days/week) w/ \$125 M&G	\$7,050	\$7,100	0.71%	\$50
Barrett All M&G (Upperclass only)*	\$3,270	\$3,320	1.53%	\$50
Average Increase Barrett Plans			0.99%	\$50
Average Increase All Meal Plans			1.50%	\$67

Notes:

(*) Indicates minimum buy-in plan

The proposed rates are per person per academic year

M&G is a declining balance meal option



February 3, 2021

To the Arizona Board of Regents:

On behalf of the Residence Hall Association here at Arizona State University – Tempe (ASU – Tempe), I would like to express our support for the proposed Housing increase for the 2021-2022 Academic Year.

The Residence Hall Association at ASU-Tempe is a residential organization that caters to roughly 10,000 residents on campus. We see the importance in building community and feel that the rates presented is the necessary direction to approach development to improve the residential experience.

Hence, it is with great pleasure that I write this letter of support for the 2021-2022 Housing rates.

If you have any questions or concerns, please do not hesitate to contact me, Aundria Arneson at rha@asu.edu or our advisor, Courtney Braxton at Courtney.Braxton@asu.edu.

Sincerely,

Aundria Arneson

Aundria Arneson,
Executive Director
Residence Hall Association
Arizona State University – Tempe

Courtney R. Braxton,
Advisor
Residence Hall Association
Arizona State University – Tempe



February 3, 2021

To the Arizona Board of Regents:

On behalf of the Residence Hall Association here at Arizona State University – Tempe, I would like to express our support for the proposed Dining increase for the 2021-2022 Academic Year.

The Residence Hall Association at ASU-Tempe is a residential body that caters to roughly 10,000 residents on campus who are completely diverse in their own ways. We see the importance in building community and feel that the rates presented is the necessary direction to approach development to this wonderful place many of Arizona State University students call home.

Hence, it is with great pleasure that I write this letter of support for the 2021-2022 Dining rates.

If you have any questions or concerns, please do not hesitate to contact me, Aundria Arneson at rha@asu.edu or our advisor, Courtney Braxton at Courtney.Braxton@asu.edu.

Sincerely,

Aundria Arneson

Aundria Arneson,
Executive Director
Residence Hall Association
Arizona State University – Tempe

Courtney R. Braxton,
Advisor
Residence Hall Association
Arizona State University – Tempe



February 5th, 2021

Dear Arizona Board of Regents:

On behalf of the Residence Hall Association at Arizona State University - West, we would like to express our support for the proposed Housing Rates Increase for the 2020-2021 academic year.

The recognizable students who serve on behalf of the west campus residential population have voted in favor of the Housing Rates Increase with a vote of 10 in favor, 2 not in favor, and 2 that abstained. We recognize that this increase is crucial for the development of our residential communities to make Arizona State University a place that students can call home.

Hence, it is with great pleasure that I am writing this letter to you in support of the 2020-2021 Housing Rates Increase. If you have any questions or concerns, please don't hesitate to reach out to either Kody Cambra the Executive Director at kcambra1@asu.edu, or our advisor Tifanee Minnieweather at tifanee.minnieweather@asu.edu.

With Sun Devil Pride,

Kody Cambra

Kody Cambra
Executive Director
Residence Hall Association
Arizona State University - West

Tifanee Minnieweather

Tifanee Minnieweather
RHA/NRHH Advisor
Community Director
Arizona State University - West



February 5th, 2021

Dear Arizona Board of Regents:

On behalf of the Residence Hall Association at Arizona State University - West, we would like to express our support for the proposed Dining Rates Increase for the 2020-2021 academic year.

The recognizable students who serve on behalf of the west campus residential population have voted in favor of the Dining Rates Increase with a vote of 11 in favor, 0 not in favor, and 3 that abstained. We recognize that this increase is crucial for the development of our campus dining amenities and will help to positively impact student retention at Arizona State University - West.

Hence, it is with great pleasure that I am writing this letter to you in support of the 2020-2021 Dining Rates Increase. If you have any questions or concerns, please don't hesitate to reach out to either Kody Cambra the Executive Director at kcambra1@asu.edu, or our advisor Tifanee Minnieweather at tifanee.minnieweather@asu.edu.

With Sun Devil Pride,

Kody Cambra

Kody Cambra
Executive Director
Residence Hall Association
Arizona State University - West

Tifanee Minnieweather

Tifanee Minnieweather
RHA/NRHH Advisor
Community Director
Arizona State University - West



Dear Members of the Arizona Board of Regents,

This letter is addressing the ASU Polytechnic's results from our yearly Rate Increase meeting which took place this past Wednesday, February 10th. After the presentation from University Housing, the final vote came out to be two yays, 6 nays, and zero abstentions. Therefore, the representative vote for the ASU Polytechnic residents is nay. However, I do feel it worth stating that the RHA Executive Board is in favor of the rates proposed by university housing. Much of the discussion section of the approval process had points brought to light that deviated from the spirit of the meeting. With the exception of one, all statements during the discussion portion by residents were in regards to maintenance requests and more narrowed "complaints" rather than statements addressing the rates themselves, such as concerns over the strength of the wifi in a hall. While we absolutely respect the vote and recognize the decision made by our residents, we are concerned that the focus of said votes may not have been cast in the proper mindset. The aforementioned diversions coupled with the fact that nearly all attendees were attending Rate Increase for the first time made it feel necessary that the Executive Board express their support for the 2021-2022 University Housing Rates.

Sincerely,

Ethan Miller

Executive Director

RHA Polytechnic

Arizona State University

p: 18156419336

email: ermill13@asu.edu

ASU #1 in the U.S. for innovation

—U.S. News & World Report



Dear Members of the Arizona Board of Regents,

I am happy to report that during this year's ASU Polytechnic Rate Increase meeting, Aramark's presentation for the upcoming dining rates was near-unanimous in their approval with a vote of 7 yay, 0 nays, and 1 abstention. Students remarked how the representatives present were responsive and clear in their plans for the upcoming year overall especially when it came to food options in our union and the hours of the Poly-Marketplace. The Aramark team has done a fantastic job with their rates proposals in years past and this year was no exception; both the student body and executive board are resoundingly behind them for the upcoming school year.

Sincerely,

Ethan Miller

Executive Director
RHA Polytechnic

Arizona State University

p: 18156419336

email: emill13@asu.edu

ASU #1 in the U.S. for innovation

—U.S. News & World Report



February 11th, 2021

To the Arizona Board of Regents:

On behalf of the residents of the Arizona State University Downtown Phoenix Campus we support the rates increase proposed by University housing for the 2021-2022 academic year. The students were able to see the presentations made by the housing staff members, ask questions and discuss their thoughts on the presentation before making a final decision. The final vote came out to be 4-3-0 in favor of the increase. The students of this campus decided that the painstaking care put into the residence hall and the timely future project scheduled were enough to justify the increasing cost of living on campus. The Residence Hall Association of the Downtown Phoenix campus values transparency and gives students the opportunity to have their voices heard and make informed decisions. We thank you for your time in reading this letter.

If you have any questions or would like to see the meeting minutes of the housing rates meeting that was held on February 10th, please feel free to contact me at: Nseel@asu.edu

Thank you for your consideration,

Nathaniel Seel

Nathaniel Seel
Executive Director
Residence Hall Association
Arizona State University- Downtown Phoenix



February 12th, 2021

To the Arizona Board of Regents:

On behalf of the residents of the Arizona State University Downtown Phoenix Campus we have decided not to approve this year's rates increase proposed by SunDevil Dining for the 2021-2022 academic year. The students in attendance at the rates meeting held on February 10th were able to see the presentation made by SunDevil Dining, ask questions and discuss their thoughts on the presentation before making a final decision. The final vote came out to be 2-5-0 against the rates increase. The students stated there was insufficient information provided in the presentation to support a rate increase and were not confident that their monies would be used to improve the dining experience for the next year's residents. Residents also cited their concerns about reduced services and options at our dining and retail locations that have reduced our resident's trust in dining and their ability to improve the dining experience.

A meeting with campus leadership and dining was held after to help answer the questions residents had as well as plan interventions to alleviate the immediate concerns of the residents related to dining. The Residence Hall Association of the Downtown Phoenix Campus values transparency and giving students the opportunity to have their voices heard and we thank you for taking the time to read this letter.

If you have any questions or would like access to the meeting minutes for the rates meeting held on February 10th please feel free to contact me at: Nseel@asu.edu

Thank you for your consideration,

Nathaniel Seel

Nathaniel Seel
Executive Director
Residence Hall Association- Downtown Phoenix

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Office of the President

nau.edu/president
president@nau.edu

928-523-3232 office
PO Box 4092
Flagstaff, AZ 86011

March 25, 2021

To: Members of the Arizona Board of Regents
Subject: NAU Tuition and Fee Proposal 2021-2022

Dear Regents,

Northern Arizona University (NAU) is pleased to present the attached 2021-2022 tuition and fee recommendation to the Arizona Board of Regents. Our proposal places a high priority on NAU's mission of student access and success and the state's goals of increasing postsecondary attainment. Our university is a critical partner in guaranteeing Arizona has the talent pipeline to succeed in the state's New Economy. As a result of the Governor's proposed state investment in higher education this year, which will support key program expansion at NAU to meet Arizona's workforce needs, our 2021-2022 tuition and fee recommendation is modest and consistent with discussions on the ongoing impact the pandemic has had on our students.

Setting tuition and fee priorities requires a thoughtful balance between expanding program access and maintaining affordable options for students. Our 2021-2022 proposal features no tuition increase for undergraduate students for the second year in a row while retaining the four-year Pledge tuition guarantee for undergraduates on the Flagstaff Campus. It's the 13th year of the Pledge program, which holds that rate consistent for a second tuition setting cycle at \$11,896 for total tuition and mandatory fees for incoming resident undergraduate students on the Flagstaff campus.

While this tuition model is an ongoing priority and helps our students effectively plan for the cost of their undergraduate education in Flagstaff, our ability to continue our Pledge program with zero increases cannot be a long-term strategy. Our overall tuition structure merits review but coming out of the pandemic was not the time for an adjustment. Finally, graduate tuition, which has been below that of undergraduate on-campus tuition, will be increasing for all campus-based students, Flagstaff and statewide. This means graduate tuition for students enrolled on campus will increase 5 percent. All other tuition rates for undergraduate and graduate students will be held flat.

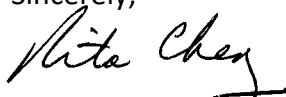
Additionally, in an effort to keep the total cost of attendance as low as possible, NAU proposes no mandatory fee increases for the 2021-2022 academic year. Cost reduction efforts will continue to focus on eliminating class fees.

NAU Tuition and Fee Proposal 2021-2022, Page 2

NAU has cut the proportion of class-specific fees in half, from approximately 32 percent of all classes having fees assessed in 2011 to only 12 percent today. One new undergraduate program fee is proposed to eliminate fees paid by students in the undergraduate dental hygiene program. This program fee proposal reflects our efforts to remain transparent in our tuition and fee setting process, ensuring our students are able to leverage financial aid support for program fees, and provide resources to administer higher cost programs without shifting the costs to all students.

Thank you for your continued support of NAU. This proposal ensures NAU remains positioned to do more for Arizona's higher educational attainment goals and workforce development, maintains the four-year tuition guarantee for undergraduates on the Flagstaff Campus, and supports our goal of providing a student-focused educational experience that emphasizes access and success.

Sincerely,

A handwritten signature in black ink that reads "Rita Cheng". The signature is written in a cursive style with a long, sweeping underline that extends to the right.

Rita Hartung Cheng
President

Northern Arizona University

Base Tuition and Mandatory Fees

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**Arizona University System
President's Recommended
2021-2022
Base Tuition and Mandatory Fees**

Undergraduate

NAU Flagstaff - Resident Undergraduate - NEW STUDENTS STARTING FALL 2021 - PLEDGE (1st Yr)

	TUITION	MANDATORY FEES							TUITION + MANDATORY FEES
		AFAT	STUDENT ACTIVITY	IT	HEALTH & WELLNESS	ATHLETIC FEE	ASNAU & GREEN FEE	Total Fees	
2020-21	\$10,650	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$11,896
2021-22	\$10,650	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$11,896
\$ Change	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
% Change	0.0%								0.0%

NAU Flagstaff - Resident Undergraduate - NON PLEDGE/NON DEGREE

	TUITION	MANDATORY FEES							TUITION + MANDATORY FEES
		AFAT	STUDENT ACTIVITY	IT	HEALTH & WELLNESS	ATHLETIC FEE	ASNAU & GREEN FEE	Total Fees	
2020-21	\$8,398	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$9,644
2021-22	\$8,398	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$9,644
\$ Change	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
% Change	0.0%								0.0%

NAU Statewide, Yuma, and Yavapai - Resident Undergraduate

	TUITION	MANDATORY FEES							TUITION + MANDATORY FEES
		AFAT	STUDENT ACTIVITY	IT	HEALTH & WELLNESS	ATHLETIC FEE	ASNAU & GREEN FEE	Total Fees	
2020-21	\$7,950	\$79		\$336				\$415	\$8,365
2021-22	\$7,950	\$79		\$336				\$415	\$8,365
\$ Change	\$0	\$0		\$0				\$0	\$0
% Change	0.0%								0.0%

NAU Flagstaff - Nonresident Undergraduate - NEW STUDENTS STARTING FALL 2021 - PLEDGE (1st Yr)

	TUITION	MANDATORY FEES							TUITION + MANDATORY FEES
		AFAT	STUDENT ACTIVITY	IT	HEALTH & WELLNESS	ATHLETIC FEE	ASNAU & GREEN FEE	Total Fees	
2020-21	\$25,396	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$26,642
2021-22	\$25,396	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$26,642
\$ Change	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
% Change	0.0%								0.0%

NAU Flagstaff - Nonresident Undergraduate - NON PLEDGE/NON DEGREE

	TUITION	MANDATORY FEES							TUITION + MANDATORY FEES
		AFAT	STUDENT ACTIVITY	IT	HEALTH & WELLNESS	ATHLETIC FEE	ASNAU & GREEN FEE	Total Fees	
2020-21	\$22,624	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$23,870
2021-22	\$22,624	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$23,870
\$ Change	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
% Change	0.0%								0.0%

NAU Statewide, Yuma, and Yavapai - Nonresident Undergraduate

	TUITION	MANDATORY FEES							TUITION + MANDATORY FEES
		AFAT	STUDENT ACTIVITY	IT	HEALTH & WELLNESS	ATHLETIC FEE	ASNAU & GREEN FEE	Total Fees	
2020-21	\$7,950	\$79		\$336				\$415	\$8,365
2021-22	\$7,950	\$79		\$336				\$415	\$8,365
\$ Change	\$0	\$0		\$0				\$0	\$0
% Change	0.0%								0.0%

NAU Online

	Tuition per Credit Hour
2020-21	\$455
2021-22	\$455
\$ Change	\$0
% Change	0.0%

**Arizona University System
 President's Recommended
 2021-2022
 Base Tuition and Mandatory Fees**

Graduate

NAU Flagstaff - Resident Graduate

	TUITION	MANDATORY FEES							TUITION + MANDATORY FEES
		AFAT	STUDENT ACTIVITY	IT	HEALTH & WELLNESS	ATHLETIC FEE	ASNAU & GREEN FEE	Total Fees	
2020-21	\$10,480	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$11,726
2021-22	\$11,004	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$12,250
\$ Change	\$524	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$524
% Change	5.0%								4.5%

NAU Flagstaff - Nonresident Graduate

	TUITION	MANDATORY FEES							TUITION + MANDATORY FEES
		AFAT	STUDENT ACTIVITY	IT	HEALTH & WELLNESS	ATHLETIC FEE	ASNAU & GREEN FEE	Total Fees	
2020-21	\$25,708	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$26,954
2021-22	\$26,994	\$84	\$50	\$336	\$550	\$150	\$76	\$1,246	\$28,240
\$ Change	\$1,286	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,286
% Change	5.0%								4.8%

NAU Statewide, Yuma, and Yavapai - Resident Graduate

	TUITION	MANDATORY FEES							TUITION + MANDATORY FEES
		AFAT	STUDENT ACTIVITY	IT	HEALTH & WELLNESS	ATHLETIC FEE	ASNAU & GREEN FEE	Total Fees	
2020-21	\$10,090	\$79		\$336				\$415	\$10,505
2021-22	\$10,596	\$79		\$336				\$415	\$11,011
\$ Change	\$506	\$0		\$0				\$0	\$506
% Change	5.0%								4.8%

NAU Statewide, Yuma, & Yavapai - Nonresident Graduate

	TUITION	MANDATORY FEES							TUITION + MANDATORY FEES
		AFAT	STUDENT ACTIVITY	IT	HEALTH & WELLNESS	ATHLETIC FEE	ASNAU & GREEN FEE	Total Fees	
2020-21	\$24,754	\$79		\$336				\$415	\$25,169
2021-22	\$25,992	\$79		\$336				\$415	\$26,407
\$ Change	\$1,238	\$0		\$0				\$0	\$1,238
% Change	5.0%								4.9%

NAU Online

	Tuition per Credit Hour
2020-21	\$575
2021-22	\$575
\$ Change	\$0
% Change	0.0%

Northern Arizona University

Program Fees

Class Fees

Other Academic Fees

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Differential Tuition, Program Fees, Class Fees

					DATA INPUT						
					Per Semester						
FEE TYPE	College/School/Program	Grad/ Undergrad	Upper/Lower Division	New or Increase	Student Enrollment	Current Fee	Proposed	Incremental Increase	Incremental Increase per AY	Estimated Additional Revenue	Reference Page #
TOTAL										\$44,800	
UNDERGRADUATE - DIFFERENTIAL TUITION											\$0
Differential Tuition					0	\$0	\$0	\$0	\$0	\$0	
Differential Tuition					0	\$0	\$0	\$0	\$0	\$0	
UNDERGRADUATE - PROGRAM FEE											\$44,800
Program Fee	CHHS, Dental Hygiene, Dental Hygiene BS	UG	Upper	Increase	64	\$1,000	\$1,350	\$350	\$700	\$44,800	11
GRADUATE - DIFFERENTIAL TUITION											\$0
Differential Tuition					0	\$0	\$0	\$0	\$0	\$0	
Differential Tuition					0	\$0	\$0	\$0	\$0	\$0	
GRADUATE - PROGRAM FEE											\$0
								\$0	\$0	\$0	
								\$0	\$0	\$0	
								\$0	\$0	\$0	
								\$0	\$0	\$0	
								\$0	\$0	\$0	
CLASS FEES											\$0
Class Fee					0	\$0	\$0	\$0	\$0	\$0	
Class Fee					0	\$0	\$0	\$0	\$0	\$0	
Class Fee					0	\$0	\$0	\$0	\$0	\$0	
Class Fee					0	\$0	\$0	\$0	\$0	\$0	
OTHER FEES											\$0
Other Fee					0	\$0	\$0	\$0	\$0	\$0	
Other Fee					0	\$0	\$0	\$0	\$0	\$0	
Other Fee					0	\$0	\$0	\$0	\$0	\$0	

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PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: Northern Arizona University College/School: College of Health & Human Services

Department: Dental Hygiene Program: BSDH

Both
 Graduate
 Undergraduate
 Upper Division
 Choose One Option

Resident:
 \$ 1,000 /semester
 \$ 1,350 /semester
 Effective Date: Fall
 2021
(this field you may enter other option just by typing it in box)

Non-Resident:
\$ 1,000 /semester
 \$ 1,350 /semester
 Effective Date: Fall
 2021
(this field you may enter other option just by typing it in box)

Program Fee History:		Most Recent Date & Change to fee (Date/Amount)
Resident:		
Date Fee Established	<u>Fall 2019</u> and original amount <u>\$ 1,000</u>	<u>Fall 2020</u> <u>\$ 1,000</u>
		Most Recent Date & Change to fee (Date/Amount)
Non-Resident:		
Date Fee Established	<u>Fall 2019</u> and original amount <u>\$ 1,000</u>	<u>Fall 2020</u> <u>\$ 1,000</u>

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

This fee request is to increase the existing fee to \$1350 per semester (fall/spring), and including \$1,000 for summer. This fee change will have following purpose:
 1. Enable dropping all incidental fees, which currently total \$32,000 per year for the BS Dental Hygiene curriculum. Incidental fees are not standard course fees. Incidental fees are currently used to cover costs associated with broken dental equipment, dental equipment repairs, and dental equipment replacement due to student use, misuse, and abuse. Incidental fees are paid per semester.
 2. Better maintain equipment and software relevant to the BS Dental Hygiene curriculum, including the Dental Hygiene clinic which provides students with "real world" experience.

NOTE: Fall/Spring cohort (N=64) pays \$1350/semester, summer cohort (N=32) pays \$1000/summer. Total revenue at bottom is calculated based on the 1350/semester with adjusted "number of students" to show accurate annual revenue.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

1. Increase in prices of dental hygiene masks, face shields, gowns, gloves.
2. Handpieces, radiographic equipment, and ultrasonic units and other supplies required for effective education and practice.
3. Specialized dental hygiene software: grading, on-line reference materials, patient record-keeping, radiographic imaging.
4. Maintenance/repair/replacement of clinic/teaching tools, equipment and infrastructure.

Student Consultation (Please describe the method and outcomes of student consultation)

In Oct 2020, an anonymous survey was sent to all senior and junior dental hygiene students regarding including the incidental fee as part of the program fee which would result in an increase. One hundred percent (29/29) of Seniors responded with 79% (23/29) approving the changes. Twenty-two percent (7/39) of Juniors responded with 100% (7/7) approving the changes.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
NAU	BSDH	\$ 28,150	\$ 41,530	
College of the Pacific	BSDH	32,519.00	49,588.00	
Univ of New Mexico	BSDH	24,567.00	40,204.00	
Eastern Washington	BSDH	23,011.00	40,132.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 14.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 1,350.00
Number of Students	#	\$ 152
Total Revenue	=	\$ 204,795.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 28,671.30
Administrative Service Charge	\$	
Personnel expenditures	\$	
Operating and materials expenditures	\$	\$ 176,123.70
	\$	
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 204,795.00

NAU EXISTING DIFFERENTIAL TUITION and PROGRAM FEES SUMMARY

PROGRAM FEES					
DATE ESTABLISHED	COLLEGE/SCHOOL	PROGRAM	GR/UNDER	AMOUNT	EST. ANNUAL REVENUE \$
2020	Education	Clinical Psychology, PsyD	Graduate	\$3,500/semester	\$672,000
2020	Education	Combined Counseling-School Psychology, PhD	Graduate	\$750/semester	\$45,000
2020	Education	Counseling - School Counseling, MEd	Graduate	\$500/semester	\$50,000
2020	Education	PK-12 College and Career Counseling, MEd	Graduate	\$300/semester	\$18,000
2020	Engineering, Informatics and Applied Sciences	Cybersecurity (Online), MS	Graduate	\$2,750/semester	\$209,000
2020	Engineering, Informatics and Applied Sciences	Cybersecurity (Online), BS	Undergraduate	\$1,000/semester	\$360,000
2020	Health and Human Services	Physician Assistant Studies	Graduate	\$6,667/semester	\$2,000,000
2019	Social and Behavioral Sciences	Visual Communication, BFA	Undergraduate	\$250/semester	\$62,500
2019	Social and Behavioral Sciences	Creative Media & Film, Independent Filmmaking emphasis, BS	Undergraduate	\$400/semester	\$80,000
2019	Health and Human Services, School of Nursing	Nursing, BSN	Undergraduate	\$600/semester	\$444,000
2019	Health and Human Services	Dental Hygiene, BSDH	Undergraduate	\$1,000/semester	\$252,000
2019	W.A. Franke College of Business	Business Division and School of Hotel & Restaurant Management	Undergraduate	\$350/semester	\$427,000
2019	Engineering, Informatics and Applied Sciences	All programs	Undergraduate	\$425/semester	\$2,130,950
2019	Health and Human Services	Doctor of Physical Therapy - Phx Biomedical	Graduate	\$4,000/semester	\$1,112,000
2019	Health and Human Services	Doctor of Physical Therapy - Flagstaff	Graduate	\$3,000/semester	\$876,000
2019	Engineering, Informatics and Applied Sciences	All programs	Graduate	\$450/semester	\$65,700
2019	Education	Clinical Mental Health Counseling, MS	Graduate	\$500/semester	\$48,000
2019	Education	School Psychology, Educational Specialist EDS	Graduate	\$750/semester	\$103,500
2018	Social and Behavioral Sciences	Master of Social Work	Graduate	\$600/semester	\$30,000
2018	Health and Human Services	Masters of Public Health - Health Promotion	Graduate	\$260/semester	\$9,400
2018	Health and Human Services	Masters of Public Health - Nutrition	Graduate	\$435/semester	\$10,400
2018	Health and Human Services	Fitness Wellness, BS	Undergraduate	\$75/semester	\$21,000
2018	Health and Human Services	Public Health, BS	Undergraduate	\$30/semester	\$24,000
2018	Health and Human Services	Nutrition and Foods, BS	Undergraduate	\$150/semester	\$24,000
2018	Office of the Provost	Honors Program	Undergraduate	\$350/sem	\$650,000
2016	Health and Human Services	BSN Regular Nursing Option	Undergraduate	\$10/CH	\$150,000
2016	Health and Human Services	Nursing DNP	Graduate	\$60/CH	\$10,080
2016	Yuma	Master of Global Business Administration	Graduate	\$6,000 total over program	\$60,000
2016	Social and Behavioral Sciences	Master of Public Administration	Graduate	\$750/sem	\$36,000
2016	Health and Human Services	MS and Post MS FNP Certificate	Graduate	\$60/credit	\$6,000
2016	Health and Human Services	MS Athletic Training - Phx Biomed Campus	Graduate	\$1,500/sem	\$85,000

NAU EXISTING DIFFERENTIAL TUITION and PROGRAM FEES SUMMARY

PROGRAM FEES					
DATE ESTABLISHED	COLLEGE/SCHOOL	PROGRAM	GR/UNDER	AMOUNT	EST. ANNUAL REVENUE \$
2016	Health and Human Services	BSN Accelerated Option - post bacc	Undergraduate	\$800/sem for three semesters	\$45,000
2016	Environment, Forestry, and Natural Sciences	Geology, BS (Jr & Sr)	Undergraduate	\$700/sem for three semesters	\$50,000
2014	Health and Human Services	Doctor of Occupational Therapy	Graduate	\$5,500/sem	\$1,089,000
2014	Environment, Forestry, and Natural Sciences	Forestry, BSF (Jr & Sr)	Undergraduate	\$200/sem	\$36,000
2013	Health and Human Services	MS Athletic Training - Flagstaff Campus	Graduate	\$1,000/sem	\$26,000
2013	Environment, Forestry, and Natural Sciences	MS Climate Science and Solutions	Graduate	\$1,500/sem for three semesters	\$50,000
2012	Health and Human Services	Doctor of Nursing Practice	Graduate	\$60/credit	\$5,000
2012	Health and Human Services	MS Clinical Speech-Language Pathology	Graduate	\$40/credit	\$25,000
2010	Business	Master of Business Administration	Graduate	\$7,000 (total program)	\$175,000
2010	Health and Human Services	MS Nursing-Generalist	Graduate	\$60/credit hour	\$120,000
2001	Engineering, Informatics and Applied Sciences	Master of Engineering (MENG)	Graduate	\$402/credit hour for distance-delivered courses	\$0

Northern Arizona University

Student Housing

Dining

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NORTHERN ARIZONA UNIVERSITY HOUSING RATE REQUESTS

Northern Arizona University requests Board approval to set 2021-2022 Residence Hall rates by a weighted average increase of 4.45% over prior year. This rate increase reflects the following changes:

- Simplification of rent rate structure, collapsing 17 previous rates into 5 main rent levels. The new levels are based on bedroom privacy (shared/private room), and unit type/capacity.
- Rent rates will now include the cost of laundry rolled into rent on the front end, eliminating the need for per load laundry payment.
- Reduction of unit capacity in shared-bedroom apartments from three students to two students, increasing privacy, space and value.
- Renovations of South Village in summer 2020 and Campus Heights in summer 2021

The development of room and board rates at Northern Arizona University involves an advisory council of residential students, elected student leaders on campus from Residence Hall Association (RHA), and staff representing departments outside of housing.

- The objective is to ensure the educational, programmatic and service support necessary to meet students' needs and enhance academic and personal success.
- The council reviewed the University Housing budget, including major expenditures and capital projects for the current and following fiscal year. Influential factors including aging infrastructure, planned improvements affecting the FY22 budget, utilities, and debt service, were also reviewed. Requested rate increases will allow for continued progress in responding to these ongoing concerns.
- Current and proposed residence hall rates are the lowest among the three state universities.
- Projected room and board rate increases were reviewed and supported unanimously by the advisory council. A letter supporting the proposed rates from the president of the Residence Hall Association is attached as documentation.

**NORTHERN ARIZONA UNIVERSITY
 PROPOSED NEW AY RENT RATE STRUCTURE**

Room/Building Type	Description	Residence Halls	Rent Rate Per Resident
Shared Bedroom/ Traditional	Room shared by two students. Traditional residence hall with a community bathroom for the floor/wing.	Allen, Campbell, Cowden, McConnell, Morton, Reilly, Sechrist, Taylor, Tinsley, Wilson	\$6,000
Shared Bedroom/ Suite	Suite with two shared bedrooms connected by one bathroom. Four students housed per suite; two per bedroom.	Calderon, Gabaldon, Mountain View	\$6,366
Shared Bedroom/ Apartment	Apartment with one bedroom, one bathroom, living room and kitchen, shared by two students.	Campus Heights, Courtyards (Gillenwater, McDonald, Raymond), Roseberry	\$7,002
	Apartment with two shared bedrooms, two bathrooms, living room and kitchen. Houses four students.	McKay Village	
Private Bedroom/ Multiple-Student Apartment	Apartment with four private bedrooms, two bathrooms, living room and kitchen. Houses four students.	McKay Village, Pine Ridge Village	\$7,500
	Apartment with three private bedrooms, one bathroom, living room and kitchen. Houses three students.	McKay Village	
Private Bedroom/ Two-Student Apartment	Apartment with two private bedrooms, one bathroom, living room and kitchen. Houses two students.	Campus Heights, McKay Village, South Village	\$8,004

**NORTHERN ARIZONA UNIVERSITY
 PROPOSED ACADEMIC YEAR RESIDENCE HALL RATES
 SINGLE STUDENT**

Notes:

Residence Hall/Room Type	AY 20/21 Rent Rate	AY 21/22 Rent Rate (includes laundry)	Weighted Ave \$ Change	Weighted Ave % Change
Shared Bedroom/Traditional Hall	\$5,852	\$6,000	\$148	2.53%
Shared Bedroom/Suite				
Calderon - Suite	\$5,908	\$6,366	\$458	7.75%
Gabaldon - Suite	\$5,852	\$6,366	\$514	8.78%
Mountain View - Suite	\$5,852	\$6,366	\$514	8.78%
Shared Bedroom/Apartment				
Campus Heights - 1 bedroom-2 Residents	\$6,284	\$7,002	\$718	11.43%
McKay Village - 2/2	\$6,188	\$7,002	\$814	13.15%
Private Bedroom/Multiple-Student Apartment				
McKay Village - 3/1	\$6,988	\$7,500	\$512	7.33%
McKay Village/Pine Ridge Village - 4/2	\$6,692	\$7,500	\$808	12.07%
Private Bedroom/Two-Student Apartment				
McKay Village - 2/1	\$7,500	\$8,004	\$504	6.72%
South Village - 2/1	\$6,412	\$8,004	\$1,592	24.83%
Weighted Ave	\$6,083	\$6,353.90	\$270.90	4.45%

- 1) AY 21/22 rate increase includes laundry.
- 2) Calculations do not include room types that will no longer exist (1-bedroom and 2-bedroom apartments housing three students).
- 3) South Village was renovated summer 2020 and Campus Heights will be renovated summer 2021.
- 4) Private room buyouts in traditional and suite halls will be offered at an additional \$1,500 per academic year on top of base rent.

PROPOSED MONTHLY RATE - FAMILY HOUSING APARTMENTS

	20/21 Rate	21/22 Rate	\$ Increase	% Increase
2-bedroom family rate (South Village)	\$991	\$1,100	\$109	11%

Notes:

- 1) Apartments are partially furnished and include all utilities and internet. In addition, 21/22 monthly rate now includes laundry, and reflects recent renovations to South Village.
- 2) Rate remains lower than current Flagstaff market for a similar 2-bedroom apartment type.

For Information Only

NAU Related Entities/American Campus Communities Properties

Honors College	2020-2021	2021-2022	\$ Increase	%Increase
	AY rate	AY rate		
Semi-suite (shared room)	\$7,080	\$7,293	\$213	3.01%
Semi-suite (private room)	\$7,800	\$8,034	\$234	3.00%
Hilltop Townhomes	2020-2021	2021-2022	\$ Increase	%Increase
	per payment	per payment		
4/3 (private bathroom)	\$799	\$824	\$25	3.04%
4/3 (shared bathroom)	\$779	\$804	\$25	3.07%
Skyview				
2 bed/2 bath	\$824	\$849	\$25	3.03%
3 bed/3 bath	\$799	\$829	\$30	3.75%
4 bed/4 bath (A)	\$794	\$824	\$30	3.78%
4 bed/4 bath (B)	\$789	\$819	\$30	2.98%
4 bed/4 bath townhome	\$794	\$829	\$35	4.41%
The Suites				
2/1 (private room)	\$789	\$809	\$20	2.48%
1/1 (shared room)	\$699	\$679-\$699	\$0 to -\$20	0% to -3.94%
1/1 (triple occupancy)	\$479	\$469	-\$10	-0.85%
1/1 (private suite)	\$999	\$1,099	\$100	2.80%



NORTHERN ARIZONA UNIVERSITY MEAL PLAN REQUEST

Northern Arizona University requests Board approval to set 2021-2022 Meal Plan rates based on an average increase of 2% for residential meal plans. This proposed increase is necessary in order to meet the elevated minimum hourly wage mandated by the City of Flagstaff and also incorporates national and regional inflationary increases in food costs as well as predicted meal plan participants for the 2021-2022 academic year.

- Northern Arizona University continuously assesses the quality and satisfaction of the food service program through campus-wide surveys and student focus groups. Surveys consistently show overall satisfaction scores exceeding 90% and our student advisory committees are engaged in day-to-day programming as well as long term planning. The food service contractor and the university will continue to adjust the program offerings and events based on feedback from the groups, surveys, and the Campus Dining Advisory Council.
- In fall 2020, 3941 first time freshmen living on campus had a mandatory meal plan. Nineteen of these first-time freshmen completed a request for meal plan exemption, and fifteen of those were granted either a full or partial exemption to the requirement. The remaining 3926 students, or 99.6%, are eligible for the 2YR rate guarantee and will not see an increase in the price of their meal plan for the 2021-2022 academic year.
- In fall 2020, 2676 upper class and off campus students selected a non-mandatory meal plan. These non-mandatory plan participants represent 44% of the total population of meal plan participants which indicates a high level of satisfaction, value, and convenience in the meal plan options.

NORTHERN ARIZONA UNIVERSITY ACADEMIC YEAR MEAL PLAN PROPOSED RATES

Proposed pricing for 2021/2022 meal plans	Proposed increase (City of Flagstaff minimum wage & inflation)	Semester Total (Rounded for 3-payments)	Annual Total	
2020/2021 Price	2% increase	2021/2022 Proposed Price	2021/2022 Proposed Price	
FYR ACADEMIC 10	\$2,315.00	\$38.30	\$2,352.00	\$4,704.00
FYR ACADEMIC 14	\$2,619.00	\$50.38	\$2,670.00	\$5,340.00
ACADEMIC 14 PLATINUM	\$2,756.00	\$53.12	\$2,808.00	\$5,616.00
FYR ACADEMIC 19	\$2,859.00	\$55.18	\$2,913.00	\$5,826.00
ACADEMIC 19 PLATINUM	\$3,041.00	\$56.82	\$3,099.00	\$6,198.00
FYR ACADEMIC UNLIMITED	\$2,859.00	\$55.18	\$2,913.00	\$5,826.00



Residence Hall Association

(928) 523-2341
rha@nau.edu
naurha.com

March 4, 2021

To the Arizona Board of Regents:

The Residence Hall Association (RHA) of Northern Arizona University is the elected body representing residential students on the NAU campus. RHA is offering its support of the proposed increase in student housing rates and dining rates for the 2021-2022 academic year.

RHA had significant involvement in the review of the annual budget, hall improvements, and the various factors leading to the recommended housing rates. This year, we also covered dining rates as well as improvements to be made in the coming academic school year. Rate options were reviewed and discussed thoroughly by the RHA board as well as students involved with RHA. RHA found the improvements planned and the additional changes started such as laundry to be included in costs rather than pay by use to be more than just. The process for establishing housing rates is an open process with extensive student involvement in the process and decision and we believe this recommendation best represents the students and their interests. This recommendation had unanimous support from RHA and faculty/staff members on the committee.

Sincerely,
Colin Barz

Colin Barz

RHA President

1200 E. University Blvd. Rm. 200
P.O. Box 210021
Tucson, AZ 85721-0021
Ofc: 520-621-5511
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president.arizona.edu

MEMORANDUM

TO: Arizona Board of Regents

FROM: Robert C. Robbins, President, The University of Arizona

DATE: March 11, 2021

SUBJECT: 2021-2022 Tuition and Mandatory Fee Proposals



I am pleased to submit the University of Arizona's tuition and mandatory fees proposal for the 2021-2022 academic year. As a reminder, more than 99% of continuing undergraduate students will experience *no increase* in tuition or mandatory fees for 2021-2022, due to their enrollment in the tuition guarantee program.

As I have shared with the Board, the University of Arizona's strategic plan creates a bold, distinctive, and differentiated vision for our future. By its very nature, the plan calls for strategic and nuanced decisions around investments; investments that allow the University to tackle society's biggest challenges and prepare graduates to successfully carry forward the torch of inspirational human endeavor. Tuition and fee increases are one small piece of institutional funding strategies for these investments, along with increased operational efficiencies, general appropriations, investment income, auxiliaries income, and available reserves. Combined, they allow us to propel forward our vision under the strategic plan's five pillars:

- The Wildcat Journey – driving student success for a rapidly changing world
- Grand Challenges – tackling critical problems at the edges of human endeavor
- The Arizona Advantage – driving social, cultural, and economic impact
- UA Global – engaging the world
- Institutional Excellence – ensuring UA lives its values and innovative culture to enable a high performing academic and administrative enterprise

In a similar spirit of making strategic, nuanced decisions, the UA proposes the following increases to tuition and mandatory fees for 2021-2022:

- Undergraduate, guaranteed resident tuition will increase 0%
- Undergraduate, guaranteed non-resident tuition will increase 1.4%
- Undergraduate, non-guaranteed tuition will increase 1.4%
- Graduate, resident tuition will increase 1.4%

- Graduate, non-resident tuition will increase .7%
- College of Medicine-Tucson resident tuition will increase 3.0% and non-resident will increase 1.0% for first-year students, while second through fourth year resident and non-resident students will see no increase for the 2021-2022 academic year.
- College of Medicine-Phoenix resident tuition will increase 3.0% for first through fourth year students, and non-resident tuition will increase 1.0% for first through fourth year students for the 2021-2022 academic year.
- College of Veterinary Medicine, resident and non-resident tuition will increase 2% for first-year students, while the second-year cohort will see no increase for the 2021-2022 academic year.
- Mandatory fees will not increase for the 2021-2022 academic year, with the exception of the Recreation Center Program fee which may increase annually based on the Consumer Price Index, and the Arizona Financial Aid Trust fee, which increases based on an approved tuition increase.

As a reminder, incoming undergraduate students for the 2021-2022 academic year will be guaranteed the new tuition and fees rate for four consecutive years. Incoming graduate students for the 2021-2022 academic year will be guaranteed the new mandatory fees rate for four consecutive years. Our student leadership continues to share that the tuition and fees guarantee remains a valued program by students and parents, allowing them to plan for the cost of attendance across the life of a student's experience at the University of Arizona.

All of the enclosed materials are a result of collaborative dialogue with student leaders from the Associated Students of the University of Arizona (ASUA) and the Graduate and Professional Student Council (GPSC). Beginning in May when new student leadership takes office, university leadership hosts multiple conversations with student leaders, engaging in a dialogue on the proposal after sharing detailed information about the University's historical and current financial picture, projected trends in revenues and expenses, peer institutional data, and the need for additional institutional investments. Through collaboration, compromise, and thoughtful discussion, the group supports the tuition and fees increases as noted above.

I look forward to the upcoming opportunities to discuss this proposal with the Regents and to their continued support as we advance the mission of the University of Arizona and deliver on the promise to serve the diverse population of our state in ways that meet the unique needs of Arizonans.

University of Arizona

Base Tuition and Mandatory Fees

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University of Arizona College of Medicine - Tucson
Medical Student Tuition

1 st YR Residents:	\$17,294 per semester	Effective Date: Fall 2021
2 nd YR Residents:	\$16,790 per semester	
3 rd YR Residents:	\$16,301 per semester	
4 th YR Residents:	\$15,826 per semester	
1 st YR Non-Residents:	\$27,361 per semester	
2 nd -4 th YR Non-Residents:	\$27,090 per semester	

Purpose

The College of Medicine - Tucson is requesting a 3% tuition increase starting academic year 2021-2022 for incoming resident students only and 1% increase for non-resident incoming students. Resident and non-resident tuition for 2nd, 3rd and 4th year students, will remain the same. The proposed tuition and fee levels are benchmarked to the median of the ABOR approved peers for medical school tuition and fees. In comparing our current tuition rate to our ABOR peers, resident tuition is currently below median at 92% of comparable institutions.

The total request for tuition is \$34,587 for Arizona first year resident medical students and will remain at \$33,580 for 2nd year resident medical students, \$32,602 for 3rd year resident medical students and \$31,652 for 4th year resident students. Non-resident tuition for 1st year students will be \$54,722 and 2nd -4th year non-resident student tuition will remain at \$54,180. This breaks down for 1st year residents to \$17,294 per semester, 2nd year residents to \$16,790 per semester, 3rd year residents to \$16,301 per semester, and 4th year resident students \$15,826 per semester. The break down for non-residents is \$27,361 per semester for 1st year, and \$27,090 per semester for 2nd -4th years. The proposed tuition rate levels do not include university-wide mandatory fees, which are separately assessed, and are currently approved by ABOR to be \$1,334 per year for both residents and non-residents.

For the purpose of calculating an average tuition that will project an accurate revenue, considering actual res/non-res enrollment; the budget below shows a calculated average tuition of \$38,408. The average tuition was calculated as follows:

1st YR Residents: \$34,587 (proposed annual rate) X 90 student enrollment (75% of 120 1st YR students) = \$3,112,866.

2nd YR Residents: \$33,580 X 90 (75% of 120 students) = \$3,022,200.

3rd YR Residents: \$32,602 X 90 (75% of 120 students) = \$2,934,180.

4th YR Residents: \$31,652 X 90 (75% of 120 students) = \$2,848,680.

1st YR Non-Residents: \$54,722 X 30 (25% of 120 students) = \$1,641,654

2nd -4th YR Non-Res: \$54,180 X 90 student enrollment (25% of 360 students) = \$4,876,200.

The total Revenue should be \$18,435,780/ 480 students = \$38,408. (The rate for budget purposes).

Justification

Medical education is a resource intensive program and as such the tuition is higher. To keep up with our ABOR peers and to remain competitive nationally as a medical school, we are requesting an increase to 1st year resident and 1st year non-resident tuition only. Increasing only resident/non-resident 1st year tuition will allow us to remain competitive with other benchmarked institutions and catch up with the disparities that were caused by breaking out graduation tuition and a program fee from previous years.

The increase only applied to first year students takes into consideration the importance our students place on anticipating the full cost of their education and associated debt, which can be significant for medical school.

This proposal is consistent with ABOR policy 4-101, whereby in setting College of Medicine tuition and fees, the Board will consider tuition and fees charged by peers at other colleges of medicine. Also, ABOR policy requires Board approval for tuition changes.

Student Consultation

As part of increasing the resident rate tuition, a student town hall was conducted on February 10, 2021 to discuss the proposed tuition increase for 1st year incoming students.

Market Pricing

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Texas A&M University	Medical Degree	\$16,220	\$29,320	
Univ of Texas-Austin	Medical Degree	\$19,006	\$33,326	
Ohio State University	Medical Degree	\$29,680	\$54,600	
Michigan State University	Medical Degree	\$31,312	\$58,066	
Univ of North Carolina- Chapel Hill	Medical Degree	\$32,746	\$60,140	
University of Florida	Medical Degree	\$32,744	\$45,000	
The University of Arizona - Tucson	Medical Degree	\$33,580	\$54,180	
Univ. of Wisconsin-Madison	Medical Degree	\$38,143	\$54,319	
Univ. of Calif-Los Angeles	Medical Degree	\$37,620	\$49,865	
Univ of Minnesota-Twin Cities	Medical Degree	\$36,842	\$52,872	
University of Washington	Medical Degree	\$37,896	\$68,328	
University of Maryland(Baltimore)	Medical Degree	\$37,810	\$66,905	
University of Iowa	Medical Degree	\$36,382	\$57,157	
Univ. of California – Davis	Medical Degree	\$39,032	\$51,277	
University of Illinois	Medical Degree	\$45,360	\$78,537	
Penn State Univ-Main Camus	Medical Degree	\$50,960	\$50,960	

BUDGET

Financial Aid Set Aside (FSA) Amount: 14.0%

Proposed Annual Revenue

Differential Tuition	\$	38,408
Number of Students	#	480
Total Revenue	=	\$18,435,780

Proposed Annual Expenditures

Financial Aid Set Aside	\$	2,581,009
Administrative Service Charge	\$	2,846,484
Institutional and Advising Personnel	\$	8,455,386
Support Staff Expense	\$	2,601,657
Operating Expenses	\$	1,951,243
Total Program Costs	=	\$18,435,780

University of Arizona College of Medicine - Phoenix Medical Student Tuition

Tuition

1 st and 2 nd YR Residents:	\$17,294 per semester	Effective Date: Fall 2021
3 rd and 4 th YR Residents:	\$16,790 per semester	
1 st -4 th YR Non-Residents:	\$27,361 per semester	

Purpose

The College of Medicine – Phoenix is requesting a 3% tuition increase starting academic year 2021-2022 for 1st – 4th year resident students. We are also requesting a 1% tuition increase starting academic year 2021-2022 for 1st – 4th year non-resident students. The proposed tuition and fee levels are benchmarked to the median of the ABOR approved peers for medical school tuition and fees. In comparing our current tuition rate to our ABOR peers, resident tuition is currently below median at 92% of comparable institutions.

The total request for tuition is \$34,588 for Arizona 1st and 2nd year resident medical students and \$33,580 for 3rd and 4th year resident medical students, and \$54,722 for 1st – 4th year non-resident medical students. This breaks down for 1st and 2nd year residents to \$17,294 per semester, and for 3rd and 4th year residents to \$16,790 per semester. The breakdown for 1st – 4th year non-resident medical students is \$27,361 per semester. The proposed tuition rate levels do not include university-wide mandatory fees, which are separately assessed, and are currently approved by ABOR to be \$800 per year for both residents and non-residents.

For the purpose of calculating an average tuition that will project an accurate revenue, taking into account actual res/non-res enrollment, the budget below shows a calculated average tuition of \$39,303. The average tuition amount was calculated as follows:

1st YR Residents: \$34,588 (proposed annual rate) X 90 student enrollment (75% of 120 1st YR students) = \$3,112,920

2nd YR Residents: \$34,588 X 75 (75% of 100 students) = \$2,594,100

3rd and 4th YR Residents: \$33,580 X 120 (75% of 160 students) = \$4,029,600

1st YR Non-Residents: \$54,722 X 30 (25% of 120 students) = \$1,641,660

2nd- YR Non-Res: \$54,722 X 25 (25% of 100 students) = \$1,368,050

3rd-4th YR Non-Res: \$54,722 X 40 (25% of 160 students) = \$2,188,880

The total Revenue should be \$14,935,045/380 students = \$39,303. (The rate for budget purposes).

Justification

Medical education is a resource intensive program and as such the tuition is higher than other doctoral programs. To keep up with our ABOR peers and to remain competitive nationally as a medical school, we are requesting an increase of 3% for 1st – 4th year resident tuition and 1% for 1st – 4th year non-resident tuition. As a young medical school, College of Medicine – Phoenix has attempted to minimize unanticipated increases in tuition to our medical students while still providing necessary resources to the students to enhance their education experience.

This proposal is consistent with ABOR policy 4-101, whereby in setting College of Medicine tuition and fees, the Board will consider tuition and fees charged by peers at other colleges of medicine. Also, ABOR policy requires Board approval for tuition changes.

Student Consultation

As part of increasing the resident rate tuition, a student town hall was conducted on February 17th, 2021 at 5pm to discuss the proposed tuition increase.

Market Pricing

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Texas A&M University	Medical Degree	\$16,220	\$29,320	
Univ of Texas-Austin	Medical Degree	\$19,006	\$33,326	
Ohio State University	Medical Degree	\$29,680	\$54,600	
Michigan State University	Medical Degree	\$31,312	\$58,066	
Univ of North Carolina- Chapel Hill	Medical Degree	\$32,746	\$60,140	
University of Florida	Medical Degree	\$32,744	\$45,000	
The University of Arizona – Tucson	Medical Degree	\$33,580	\$54,180	
The University of Arizona – Phoenix	Medical Degree	\$33,580	\$54,180	
Univ. of Wisconsin-Madison	Medical Degree	\$38,143	\$54,319	
Univ. of Calif-Los Angeles	Medical Degree	\$37,620	\$49,865	
Univ of Minnesota-Twin Cities	Medical Degree	\$36,842	\$52,872	
University of Washington	Medical Degree	\$37,896	\$68,328	
University of Maryland(Baltimore)	Medical Degree	\$37,810	\$66,905	
University of Iowa	Medical Degree	\$36,382	\$57,157	
Univ. of California – Davis	Medical Degree	\$39,032	\$51,277	
University of Illinois	Medical Degree	\$45,360	\$78,537	
Penn State Univ-Main Camus	Medical Degree	\$50,960	\$50,960	

BUDGET

Financial Aid Set Aside (FSA) Amount: 14.0%

Proposed Annual Revenue

Differential Tuition	\$	39,303
Number of Students	#	380
Total Revenue	=	\$14,935,045

Proposed Annual Expenditures

Financial Aid Set Aside	\$	1,209,739
Administrative Service Charge	\$	466,660
Institutional and Advising Personnel	\$	8,619,492
Support Staff Expense	\$	2,648,985
Operating Expenses	\$	1,990,169
Total Program Costs	=	\$14,935,045

The University of Arizona
2020-21 Tuition & Mandatory Fees with Peers

	Medical School Resident		
	2020-2021 Tuition Resident	Resident Fee	2020-2021 Total Tuition & Fees
Pennsylvania State University-Main Campus	50,960	120	51,080
University of Illinois	45,360	4,499	49,859
University of California-Davis	39,032	2,895	41,927
University of Wisconsin-Madison	38,143	1,469	39,612
University of Washington-Main Campus	37,896	1,030	38,926
University of Maryland (Baltimore)	37,810	5,316	43,126
University of California-Los Angeles	37,620	1,648	39,268
University of Minnesota-Twin Cities	36,842	1,942	38,784
University of Iowa	36,382	2,162	38,544
University of Arizona - Tucson	33,580	1,334	34,914
University of Arizona - Phoenix	33,580	800	34,380
University of North Carolina at Chapel Hill	32,746	1,955	34,701
University of Florida	32,744	3,913	36,657
Michigan State University	31,312	46	31,358
Ohio State University-Main Campus	29,680	958	30,638
The University of Texas at Austin	19,006	2,080	21,086
Texas A & M University-College Station	16,220	4,550	20,770

	Medical School Non Resident		
	2020-2021 Tuition Non- Resident	Non-Resident Fee	2020-2021 Total Tuition & Fees
University of Illinois	78,537	4,499	83,036
University of Washington-Main Campus	68,328	1,030	69,358
University of Maryland-(Baltimore)	66,905	5,316	72,221
University of North Carolina at Chapel Hill	60,140	1,955	62,095
Michigan State University	58,066	46	58,112
University of Iowa	57,157	2,162	59,319
Ohio State University-Main Campus	54,600	958	55,558
University of Wisconsin-Madison	54,319	1,469	55,788
University of Arizona - Tucson	54,180	1,334	55,514
University of Arizona - Phoenix	54,180	800	54,980
University of Minnesota-Twin Cities	52,872	1,942	54,814
University of California-Davis	51,277	2,895	54,172
Pennsylvania State University-Main Campus	50,960	120	51,080
University of California-Los Angeles	49,865	1,648	51,513
University of Florida	45,000	3,913	48,913
The University of Texas at Austin	33,326	2,080	35,406
Texas A & M University-College Station	29,320	4,550	33,870

**University of Arizona College of Veterinary Medicine
Doctor of Veterinary Medicine Students Tuition**

TUITION

1st Year Residents: \$45,900

Effective Date: Fall 2021

1st Year Non - Res: \$71,400

2nd Year Residents: \$45,000 (**Actual** Annual Rate)

2nd Year Non - Res: \$70,000 (**Actual** Annual Rate)

PURPOSE

The College of Veterinary Medicine is requesting a 2% tuition increase for the academic year 2021-2022 for the incoming cohort (1st year Resident and 1st Non-Resident students). No change in tuition is requested for the current inaugural cohort of students (2nd year Students, Class of 2023).

The College of Veterinary Medicine has received state appropriations for renovation of one building. Other than that initial support, the College is dependent on tuition revenue and development funds.

JUSTIFICATION

The DVM program is a professional medical program that requires significant investment in instructional resources beyond traditional graduate programs in order to meet American Veterinary Medical Association Council on Education Accreditation requirements.

For the market comparison, we have used reported total tuition and fee costs over all years of the DVM program for 2021 graduates at peer institutions (undergraduate and graduate ABOR peer institutions with DVM programs) and other regional universities with DVM programs (source: American Association of Veterinary Medical Colleges Annual Comparative Data Report for 2019-2020). The total tuition and fee cost is a more appropriate comparison to the University of Arizona DVM program as our design is a 3 year, year-round program, therefore annual costs at Arizona include three semesters, while comparison peer institutions only have two semesters per annum.

The estimated total tuition and mandatory fee costs for the University of Arizona DVM program for the inaugural class (with a plan to hold tuition and fees flat for this cohort) is: Resident \$140,118 and Non-resident \$215,115. The estimated tuition for the Class of 2024 (entering Fall 2021; estimated with annual 2% increases in tuition) is Resident: \$140,472 and Non-resident \$218,514

Annual revenue included below is established for 110 students in the 2nd year cohort or FY 21, the steady state expected student body that will be achieved in the 2022-2023 academic year will be 330. For calculation, the differential tuition is weighted based on expected resident/non-resident enrollment of 44 residents and 66 non-residents per cohort. The tuition revenue was held constant for this estimate.

The total request for tuition is \$45,900 per annum for Arizona Resident Veterinary Medical Students and \$71,400 per annum for Non-Resident Veterinary Medical Students. This breaks down for Arizona residents to \$15,300 per semester (3 semesters per year based on our year-round model) and for non-residents \$23,800 per semester (3 semesters per year based on our year-round model). The proposed tuition rate levels do not include university-wide mandatory fees.

In order to project an accurate revenue considering our expected res/non-res enrollment; the following budget shows a calculated Tuition amount of \$60,600

The Tuition amount was calculated as follows:

1st Year Residents: \$45,900 (Proposed Annual Rate) * 44 (40% of 110 students) = \$2,019,600

1st Year Non - Res: \$71,400 (Proposed Annual Rate) * 66 (60% of 110 students) = \$4,712,400

2nd Year Residents: \$45,000 (**Actual** Annual Rate) * 44 (40% of 110 students) = \$1,980,000

2nd Year Non - Res: \$70,000 (**Actual** Annual Rate) * 66 (60% of 110 students) = \$4,620,000

The total revenue should be \$13,332,000 / 220 Students = \$60,600 (Rate for Proposed Differential Tuition budgeting purposes)

STUDENT CONSULTATION

The elected officers of the inaugural class were consulted regarding this proposal on Wednesday January 20, 2021.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
University of Minnesota	DVM	149,601.00	285,367.00	
University of Arizona	DVM	140,472.00	218,514.00	
Ohio State University	DVM	140,231.00	252,056.00	
Michigan State University	DVM	138,666.00	238,967.00	
University of California-Davis	DVM	132,100.00	181,080.00	
University of Wisconsin	DVM	122,690.00	194,383.00	
University of Florida	DVM	115,160.00	182,000.00	
Washington State University	DVM	102,040.00	135,237.00	
Texas A&M	DVM	99,929.00	153,809.00	
University of Illinois	DVM	97,251.00	162,838.00	
Regional				
Midwestern University-Glendale	DVM	259,720.00	259,720.00	
Western University of Health Sciences Pomona	DVM	223,102.00	223,102.00	
Colorado State University	DVM	155,295.00	250,200.00	
Oregon State University	DVM	107,432.00	206,177.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 14%

Proposed Annual Revenue		
DVM Tuition	\$	\$60,600.00
Number of Students	#	220
Total Revenue	=	\$13,332,000
Proposed Annual Expenditures		
Financial Aid Set-Aside		\$ 1,866,480
Administrative Service Charge		\$ 1,781,742
Institutional and Advising Personnel		\$ 4,281,318
Support Staff Expense		\$ 6,208,798
Operating Expenses		\$ 3,952,880
Total Program Costs	=	\$ 18,091,000

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2021-22 University of Arizona Online Programs

UA Undergraduate

Tuition Year	Tuition Per Credit Range ^{1 2}
2020-2021	\$500 – \$1,746
2021 - 2022	\$500 – \$1,746
\$ Change	\$0
% Change	0%

UA Graduate

Tuition Year	Tuition Per Credit Range ^{1 2}
2020-2021	\$500 - \$2,222
2021 - 2022	\$500 – \$2,222
\$ Change	\$0
% Change	0%

Note:

1 All Online Undergraduate and Graduate students are assessed a mandatory Arizona Financial Aid Trust, of \$26.50 for 1-6 units, and \$53 for 7+ units.

2 All Online Undergraduate and Graduate students are assessed a mandatory \$15 Library Fee per unit, or \$105 for 7+ units.

2021-22 Distance Programs

UA Undergraduate

Tuition Year	Tuition Per Credit Range ^{1 2}
2020 - 2021	\$300 – \$1,360
2021 - 2022	\$300 – \$1,360
\$ Change	\$0
% Change	0%

UA Graduate

Tuition Year	Tuition Per Credit Range ^{1 2}
2020 - 2021	\$478 – \$1145
2021 - 2022	\$478 – \$1,145
\$ Change	\$0
% Change	0%

Note:

1 All Distance Undergraduate and Graduate students are assessed a mandatory Arizona Financial Aid Trust, of \$26.50 for 1-6 units, and \$53 for 7+ units.

2 All Distance Undergraduate and Graduate students are assessed a mandatory \$12 Library Fee per unit, or \$84 for 7+ units.

UA Global Campus Tuition - Undergraduate Students - Current Programs

Degree Program	Partner	Location(s)	Current (2020-21)		Proposed (2021-2022)					
			Tuition per Term	Mandatory Fees	Tuition Per Term	\$ Change	% Change	Mandatory Fees	\$ Change	% Change
Business Administration (BS)	Sampoerna University	Jakarta, Republic of Indonesia	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Industrial Engineering (BS)	Sampoerna University	Jakarta, Republic of Indonesia	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Mechanical Engineering (BS)	Sampoerna University	Jakarta, Republic of Indonesia	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Business Administration (BS)	UPC	Lima, Peru	\$5,500	\$0	\$6,450	\$950	17.3%	\$0	\$0	0.0%
Communication (BA)	UPC	Lima, Peru	\$5,500	\$0	\$6,450	\$950	17.3%	\$0	\$0	0.0%
Industrial Engineering (BS)	UPC	Lima, Peru	\$5,500	\$0	\$6,450	\$950	17.3%	\$0	\$0	0.0%
Philosophy, Politics, Economics and Law (BA)	UPC	Lima, Peru	\$5,500	\$0	\$6,450	\$950	17.3%	\$0	\$0	0.0%
Sustainable Built Environments (BS)	UPC	Lima, Peru	\$5,500	\$0	\$6,450	\$950	17.3%	\$0	\$0	0.0%
Business Administration (BS)	AUPP	Phnom Penh, Cambodia	\$4,500	\$0	\$4,500	\$0	0.0%	\$0	\$0	0.0%
Civil Engineering (BS)	AUPP	Phnom Penh, Cambodia	\$4,500	\$0	\$4,500	\$0	0.0%	\$0	\$0	0.0%
Law (BA)	AUPP	Phnom Penh, Cambodia	\$4,500	\$0	\$4,500	\$0	0.0%	\$0	\$0	0.0%
Law (BA)	Ocean	Qingdao, China	\$5,000	\$0	\$5,000	\$0	0.0%	\$0	\$0	0.0%
Cyber Operations (BAS)	UoM	Reduit, Mauritius	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Civil Engineering (BS)	UoM	Reduit, Mauritius	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Systems Engineering (BS)	UoM	Reduit, Mauritius	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Electrical & Computer Engineering (BS)	UoM	Reduit, Mauritius	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Mechanical Engineering (BS)	AUIS	Sulaimani, Iraq	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Civil Engineering (BS)	AUIS	Sulaimani, Iraq	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Film and TV (BA)	DLSU	Manila, Philippines	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Law (BA)	HLU	Hanoi, Vietnam	\$5,000	\$0	\$5,000	\$0	0.0%	\$0	\$0	0.0%
Bachelor of Public Health (with accelerated MPH)	Amrita University	Kochi, India	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
BA in Communication (with accelerated MA in Tucson)	Amrita University	Kochi, India	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
BS in Agribusiness Economics and Management (with accelerated MS in Tucson)	Amrita University	Kochi, India	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
BS – Biosystems Engineering (with accelerated MS in Tucson)	Amrita University	Kochi, India	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
BS – Civil Engineering (with accelerated MS in Tucson)	Amrita University	Kochi, India	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
BS – Electrical and Computer Engineering (with accelerated MS in Tucson)	Amrita University	Kochi, India	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
BS – Mechanical Engineering (with accelerated MS in Tucson)	Amrita University	Kochi, India	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
BS – Industrial Engineering (with accelerated MS in Tucson)	Amrita University	Kochi, India	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
BS Materials Science and Engineering (with accelerated MS in Tucson)	Amrita University	Kochi, India	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Mechanical Engineering (BS)	HEBUT	Tianjin, China	\$5,500	\$0	\$5,000	-\$500	-9.1%	\$0	\$0	0.0%
Materials Science Engineering (BS)	HEBUT	Tianjin, China	\$5,500	\$0	\$5,000	-\$500	-9.1%	\$0	\$0	0.0%
Applied Physics (BS)	HEBUT	Tianjin, China	\$5,500	\$0	\$5,000	-\$500	-9.1%	\$0	\$0	0.0%
Environmental Science (BS)	NWAFU	Yangling, China	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Music	SIAS	Zhengzhou, China	\$5,000	\$0	\$5,000	\$0	0.0%	\$0	\$0	0.0%

UA Distance Campus Tuition - Undergraduate Students - New Programs

Degree Program	Partner	Location(s)	Proposed (2021-2022)	
			Tuition Per Term	Mandatory Fees
Electrical and Computer Engineering	Sampoerna University	Jakarta, Republic of Indonesia	\$5,500	\$0
Applied Computing	Sampoerna University	Jakarta, Republic of Indonesia	\$5,500	\$0
Hydrology & Atmospheric Sciences	NWAFU	Yangling, China	\$5,500	\$0
Biomedical Engineering	Amrita University	Kochi, India	\$5,500	\$0
Philosophy, Politics, Economics and Law (BA)	Universidad de las Américas	Quito, Ecuador	\$5,500	\$0
Civil Engineering	HEBUT	Tianjin, China	\$5,000	\$0
Sustainable Built Environments (BS)	HEBUT	Tianjin, China	\$5,000	\$0

UA Distance Campus Tuition - Graduate Students - Current Programs

Degree Program	Partner	Location(s)	Current (2020-21)		Proposed (2021-2022)					
			Tuition Per Term	Mandatory Fees	Tuition Per Term	\$ Change	% Change	Mandatory Fees	\$ Change	% Change
Public Health (MPH)	GMU	Ajman, United Arab Emirates	\$6,000	\$0	\$6,000	\$0	0.0%	\$0	\$0	0.0%
Accounting (MS)	PSUT	Amman, Jordan	\$6,250	\$0	\$6,250	\$0	0.0%	\$0	\$0	0.0%
Engineering Management (MS)	PSUT	Amman, Jordan	\$6,250	\$0	\$6,250	\$0	0.0%	\$0	\$0	0.0%
Architecture (MS)	UPC	Lima, Peru	\$5,500	\$0	\$6,450	\$950	17.3%	\$0	\$0	0.0%
Entrepreneurship (MS)	UPC	Lima, Peru	\$5,500	\$0	\$6,450	\$950	17.3%	\$0	\$0	0.0%
Industrial Engineering (MS)	UPC	Lima, Peru	\$5,500	\$0	\$6,450	\$950	17.3%	\$0	\$0	0.0%
International Trade & Business Law (LLM)	UPC	Lima, Peru	\$5,500	\$0	\$6,450	\$950	17.3%	\$0	\$0	0.0%
Public Health (MPH)	UPAEP	Puebla, Mexico	\$5,000	\$0	\$5,000	\$0	0.0%	\$0	\$0	0.0%
Entrepreneurship (MS)	UoM	Reduit, Mauritius	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
MS in Cellular and Molecular Medicine (1+1)	Amrita University	Kochi, India	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%
Public Health (MPH)	Amrita University	Kochi, India	\$5,500	\$0	\$5,500	\$0	0.0%	\$0	\$0	0.0%

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University of Arizona

Differential Tuition

Program Fees

Class Fees

Other Academic Fees

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Differential Tuition, Program Fees, Class Fees
UNIVERSITY OF ARIZONA

FEE TYPE	College/School/Program	Grad/ Undergrad	Upper/Lower Division	New or Increase	DATA INPUT			Incremental Increase	Incremental Increase per AY	Estimated Additional Revenue	Reference Page #
					Student Enrollment	Current Fee	Proposed				
TOTAL										\$2,405,900	
UNDERGRADUATE - DIFFERENTIAL TUITION											
UNDERGRADUATE - PROGRAM FEE											
Program Fee	College of Agriculture and Life Sciences/Norton School of Family & Consumer Sciences/ Fashion Industry's Science and Technology	Undergrad	Upper	New	100	\$0	\$250	\$250	\$500	\$50,000	25
Program Fee	College of Agriculture and Life Sciences/ School of Natural Resources & the Environment/ BS Natural Resources	Undergrad	Both	New	125	\$0	\$150	\$150	\$300	\$37,500	27
Program Fee	College of Social & Behavioral Sciences/ School of Information/ ISTA BS, ISTA BA, GAME BS	Undergrad	Upper	New	163	\$0	\$250	\$250	\$500	\$81,500	29
Program Fee	College of Science/ Chemistry & Biochemistry/ Chemistry & Biochemistry Bachelors Upper Division	Undergrad	Upper	New	160	\$0	\$150	\$150	\$300	\$48,000	33
Program Fee	College of Science/ Chemistry & Biochemistry/ Chemistry & Biochemistry Bachelors Lower Division	Undergrad	Lower	New	145	\$0	\$50	\$50	\$100	\$14,500	43
Program Fee	Honors College	Undergrad	Both	Increase	2,000	\$250	\$475	\$225	\$450	\$900,000	53
GRADUATE - DIFFERENTIAL TUITION											
GRADUATE - PROGRAM FEE											
Program Fee	College of Architecture, Planning, & Landscape Architecture/ Graduate Certificate in Heritage Conservation	Grad	N/A	Delete	23	\$200	\$0	(\$200)	(\$400)	(\$9,200)	57
COURSE FEES											
Course Fees	College of Agriculture and Life Sciences/ Animal & Comparative Biomedical Sciences/ ACBS 497B - Applied Animal Behavior Workshop	Undergrad	Upper	New	14	\$0	\$30	\$30	\$60	\$800	59
Course Fees	College of Agriculture and Life Sciences/ Animal & Comparative Biomedical Sciences/ ACBS 315L - Physiology of Reproduction Laboratory	Undergrad	Upper	Increase	20	\$20	\$90	\$70	\$140	\$2,800	63
Course Fees	College of Engineer/ Materials Science & Engineer/ MSE 222 - Introduction to Materials Science and Engineering I	Undergrad	Lower	New	40	\$0	\$50	\$50	\$100	\$4,000	65
Course Fees	College of Engineer/ Materials Science & Engineer/ MSE 450/550 - Materials Selection for the Environment	Both	Upper	New	30	\$0	\$50	\$50	\$100	\$3,000	66
Course Fees	College of Engineer/ Aerospace & Mechanical Engineering/ AME 487/587 - Design of Mechatronic Systems	Both	Upper	Increase	25	\$50	\$100	\$50	\$100	\$2,500	67
Course Fees	College of Science/ Speech, Language & Hearing Sci/ SLHS 261 - Anatomy and Physiology of the Speech Mechanism	Undergrad	Lower	Modification to Items	70	\$25	\$25	\$0	\$0	\$0	69
Course Fees	College of Science/ Geosciences/ GEOS 477/577 - Active Tectonics	Both	Upper	New	22	\$0	\$189	\$189	\$378	\$8,300	71
Course Fees	College of Social & Behavioral Sciences/ History/ HIST 328 - Cuisine, Culture, and Power	Undergrad	Upper	New	25	\$0	\$40	\$40	\$80	\$2,000	83
Course Fees	College of Fine Arts/ School of Art/ ART 200 - The Elements of Drawing	Undergrad	Lower	New	18	\$0	\$75	\$75	\$150	\$2,700	84
Course Fees	Eller College of Management/ Karl Eller Grad Sch of Mgmt (MBA) with 'DENP/ BNAD 505 - Strategic Innovation *	Grad	N/A	New	20	\$0	\$3,000	\$3,000	\$6,000	\$120,000	85
OTHER FEES											
Other Academic Fee	Office of Sustainability/ Sustainability Fee	Both	Both	New	45,000	\$0	\$10	\$10	\$20	\$900,000	87
Other Academic Fee	Enrollment Management/ Freshmen Enrollment Fee	Undergrad	Lower	Increase	3,750	\$425	\$450	\$25	\$50	\$187,500	91
Other Academic Fee	Enrollment Management/ Transfer Enrollment Fee	Undergrad	Lower	Increase	1,000	\$150	\$175	\$25	\$50	\$50,000	92

* This request is not for Main Campus

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PROGRAM FEE REQUEST - NEW

University: University of Arizona

College/School: CALS/ Norton School

Department: Family & Consumer Sciences

Program: Fashion Industry's Science and Technology

 Both Graduate Undergraduate Upper Division

Choose One Option

Resident:

\$ 250 /semester

Proposed Fee

Effective Date: Spring 2021

(this field you may enter other option just by typing it in box)

Non-Resident:

\$ 250 /semester

Proposed Fee

Effective Date: Spring 2021

(this field you may enter other option just by typing it in box)

Other Applicable Fees in School/Program

Resident:

Non-Resident:

Applicable Differential Tuition:

0

0

Number of classes within the program with a fee:

1

1

Percent of classes within the program with a fee:

14%

14%

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

Program fees will directly be tied to professional development resources, courses, software and opportunities students have once students reach advanced standing. First, a professional academic advisor will be hired to support the majors as they progress through the degree program. Second, since the curriculum relies heavily on technology and developing technical skills, the fee will support acquisition of essential equipment and labs.

EQUIPMENT AND LABS: To ensure that our graduates are digitally competent, the fee will be used to build and maintain computer, fabrication, and output systems (e.g., printers, plotters, 3D printers, laser cutters, digital routers) along with an array of professional software.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

Students with strong leadership and critical thinking skills as well as strong academic records are highly sought after by employers. Our FITS students will be competing against students graduating from other fashion colleges and institutes. Students in the FITS program will have opportunities to engage in hands-on, experiential learning to develop technological skills needed to be competitive in the fashion industry. The proposed fee will be used to enhance student engagement, career preparation, leadership experiences, career services, and professional advising to ensure that our students are highly competitive in the national job market. We propose the same program fees that are implemented in our Retailing and Consumer Sciences and the Personal and Family Financial Planning programs in the School of Family and Consumer Sciences. The fee will be assessed once students enroll in FCSC 345. Since this is a new program, the enrollments will grow over time. Projections are based on a conservative, 150 students. Once our student enrollment reaches our expected enrollment of 200 majors, the fee will significantly help to develop engagement and professional experiences for students.

Immediately, we will need a full-time academic advisor. We have close to 90 students in the minor and a large number of students waiting to enroll into the major.

The following provides detailed expenditures:

Academic Advisor II: Salary \$47,000 + ERE = \$61,570

Revenue will also be used to purchase and maintain equipment for our labs.

The University will assess administrative service charge to recover overhead costs incurred by the University. The revenues generated from the Administrative Service Charge (ASC) are used specifically to support overhead costs and administrative services that benefit the entire University, but are not easily assignable to any one unit. Examples include utilities, payroll processing, human resources, information technology, budgeting and procurement.

Student Consultation (Please describe the method and outcomes of student consultation)

A survey in the University of Arizona Qualtrics was given to fashion minor students over the fall semester of 2020. We had 85 participants answer a multiple-choice question listed below:

Q1 - As common within many majors at University of Arizona, students in the FITS major will be asked to pay program fees of \$250 per semester beginning with your junior and senior year. The fee is to deliver resources (professional development, software, academic and career advising, and other resources) that will be provided your junior and senior year. The student focused resources would not be possible without this fee. A proposal will be submitted to ABOR and your input is important as when implementing a fee, we want students to be informed of the cost of their program. How willing are you to pay this fee for the 4 semesters in your junior and senior year?

The outcome is below:

Agree to pay the fee junior and senior year 65.88% - 56

Disagree to pay the fee junior and senior year 32.94% - 28

Agree to pay the fee for all four years in the FITS major 1.18% - 1

Total 100% - 85

A small focus group was created with the University of Arizona club "Cutting Edge". Students agreed they would not want further reductions in teaching or instructional support in order to reduce program fees.

Also, the Associated Students of the University of Arizona (ASUA) and the Graduate Professional Student Council (GPSC) are the student government on the University of Arizona campus that is comprised of students who are willing to go above and beyond and serve their school and peers. ASUA and GPSC executive officers attend the annual university fees meeting and review fee proposals to ensure the benefit to the students paying the fee. They also voted to put this fee forward for ABOR review/approval.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
FIDM in Los Angeles	B.A. in Creative Industry Studies, Apparel Industry Management Core	\$ 32,732	\$ 32,732	
University of Arizona	Applied Humanities Fashion Study	12,691.00	36,718.00	
Kent State	School of Fashion	11,587.00	20,465.00	
Arizona State	Hershberger Fashion studies	11,338.00	29,428.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 14.0%

Proposed Annual Revenue

Program Fee	\$	\$ 500.00
Number of Students	#	\$ 200
Total Revenue	=	\$ 100,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 14,000.00
Administrative Service Charge	\$	\$ 13,278.00
Student Services and Advising Personnel	\$	\$ 61,570.00
Equipment and software	\$	\$ 1,535.00
Adjunct Instructors	\$	\$ 9,617.00
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 100,000.00



PROGRAM FEE REQUEST - NEW

University: University of Arizona

College/School: College of Agriculture and Life Sciences

Department: School of Natural Resources and the Environment

Program: BS Natural Resources

 Both Graduate Undergraduate Both

Choose One Option

Resident:

\$ 150

/semester

Proposed Fee

Effective Date: Fall

2021

(this field you may enter other option just by typing it in box)

Non-Resident:

\$ 150

/semester

Proposed Fee

Effective Date: Fall

2021

(this field you may enter other option just by typing it in box)

Other Applicable Fees in School/Program

Resident:

Non-Resident:

Applicable Differential Tuition:

0

0

Number of classes within the program with a fee:

3

3

Percent of classes within the program with a fee:

39%

39%

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The proposed program fees will be used to support student services and engagement opportunities inside and outside the classroom. We currently pay a 0.5 FTE academic advisor out of our discretionary funds to support the majors as they progress through the degree programs. We would like to enhance the role of our advisor by having them spend more time with 'at risk' students, as well as expand their role in helping to retain and increase diversity within our major. Discretionary funds are also used for classroom enhancements, poster printing services, student clubs, and general IT support. Program fees will enable us to address emergent needs deriving from steady SNRE program growth and an aging pedagogical infrastructure in one of our buildings. Funds are required to enable internships and improved student engagement in research, enhanced methods of instruction, securing and maintaining of upgraded technology and applications, increased laboratory sections for key courses, provision of laboratory computer lab refresh and staff support, and increased availability of field trips, including a field-based summer capstone course. The use of special equipment, technology and field studies in SNRE presents demonstrably higher costs of instruction delivery. Advising and educational improvements will boost undergraduate retention and competitiveness for positions.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

Today's job market seeks students with leadership and critical thinking skills as well as strong academic records. Students in the SNRE programs will develop these skills that enhances their competitiveness. The proposed fee will be used to enhance educational technology in the classroom, student experiential learning, career preparation, leadership experiences, and professional advising to ensure that our students are top candidates in the natural resources management job market. We expect that these existing SNRE programs and a proposed new ecotourism program will lead to continued growth in enrollment over time. We will need part time advising immediately as well as technical/computer support for the students in our programs. The following provides detailed expenditures:

Academic Advisor II: Salary + ERE = \$30,401 ; Technical support: Salary +ERE = \$9,000 ; The balance of the program fees will be used to fund student engagement activities; such as attending the annual Range and Ecological Conferences at which they will present posters that SNRE will print at cost (\$8,000). Classroom improvements including camera's sound and projector systems need to be upgraded in older teaching facilities (\$7,500).

The University will assess administrative service charge to recover overhead costs incurred by the University. The revenues generated from the Administrative Service Charge (ASC) are used specifically to support overhead costs and administrative services that benefit the entire University, but are not easily assignable to any one unit. Examples include utilities, payroll processing, human resources, information technology, budgeting and procurement.

SNRE currently receives about \$20,000 in undergraduate course fees every year that exclusively are for field trips and a computer refresh for the ENR2 N250 computer lab (every 3-4 years). One of the three course fees will be deleted if this program fee is approved as it covers the cost of poster printer services.

Student Consultation (Please describe the method and outcomes of student consultation)

We conducted an on-line survey to poll students about their satisfaction with advising, instructional services and technology, IT services that we currently provide. In total, 63 students replied to the survey. All students are exceedingly satisfied with these services (advising 84%; instructional services and technology 70%; IT services 83%) and like to keep these. Since the majority of these services come from discretionary funds, we would like to implement a program fee to sustain these services. 57 percent of them would likely pay a program fee and 43 percent were not interested in paying for these services. Financial hardship was one of the reasons. About 90 % of the respondents would be interested in offsetting the program fee costs with a scholarship. Other degree programs across the University have annual program fees that are generally between \$400 and \$700.

The Associated Students of the University of Arizona (ASUA) and the Graduate Professional Student Council (GPSC) are the student government on the University of Arizona campus that is comprised of students who are willing to go above and beyond and serve their school and peers. ASUA and GPSC executive officers attend the annual university fees meeting and review fee proposals to ensure the benefit to the students paying the fee. They also voted to put this fee forward for ABOR review/approval.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
Penn State Univ Park		\$ 18,454	\$ 35,984	
UNIVERSITY OF ILLINOIS U-C		16,862.00	34,312.00	
UC DAVIS		14,597.27	44,351.00	
University of Arizona		12,600.00	36,600.00	
Univ of Washington		11,659.00	39,028.00	
Univ. of Maryland		10,778.00	36,890.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 14.0%

Proposed Annual Revenue

Program Fee	\$	\$ 300.00
Number of Students	#	\$ 250
Total Revenue	=	\$ 75,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 10,500.00
Administrative Service Charge	\$	\$ 9,958.80
Advising Personnel	\$	\$ 30,401.00
Technical support	\$	\$ 9,000.00
Operating expenses	\$	\$ 7,500.00
Student engagement activities	\$	\$ 8,000.00
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 75,359.80



PROGRAM FEE REQUEST - NEW

University: University of Arizona College/School: Social and Behavioral Sciences
 Department: School of Information Program: ISTA BS & BA, GAME BS

Both
 Graduate
 Undergraduate
 Upper Division
 Choose One Option

Resident:
 \$ 250 /semester
 Effective Date: Fall
 2021
Proposed Fee (this field you may enter other option just by typing it in box)

Non-Resident:
 \$ 250 /semester
 Effective Date: Fall
 2021
Proposed Fee (this field you may enter other option just by typing it in box)

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>3</u>	<u>3</u>
Percent of classes within the program with a fee:	<u>4%</u>	<u>4%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

See Attached.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

- This request aims to focus program fee use on student success initiatives.
- (1) reserve 14% of fee for need-based financial aid set aside to “allow access for qualified students who cannot afford the fee.”
 - (2) provide students assistance via a new tutoring approach for the School, a help-desk style approach to student support in order to provide them just-in-time support when they need it.
 - (3) establish a dedicated staff person who will work to identify internships and match students to those experiences, and to provide students career-related support.
 - (4) hire faculty that can teach highly-technical courses given the fast-paced changes that occur in the big-data and technology sectors (75%).
 - (5) provide faculty support for gaining new technological training in order to keep their classroom teaching current.
 - (6) provide student support for educational needs, such as textbooks, statistical software, computer lending, equipment lending (e.g., virtual reality goggles), and other educational supplies.

Student Consultation (Please describe the method and outcomes of student consultation)

The Undergraduate Advisor surveyed all ISTA and GAME Development BS majors. On the survey we added a question about which students identified as being interested in participating on an elected student review board for the program fee, so we have the basis for a student committee for feedback on program fees. The students had mixed feelings about a fee, with 42% ‘agreeing’ it would have affected their choice of major but 32% indicating that they felt neutral. Student’s top choice for needed services from the iSchool was scholarships, followed by support for career engagement and then tutoring. Most students wanted a program fee that will support career engagement, followed by scholarships, additional educational support to include textbooks, educational supplies, statistical software, and tutoring for technical courses. A few students who did not choose tutoring as their number one choice indicated in comments they also wanted tutoring. The comments were also supportive of students having feedback in how program fees were spent.

Also, the Associated Students of the University of Arizona (ASUA) and the Graduate Professional Student Council (GPSC) are the student government on the University of Arizona campus that is comprised of students who are willing to go above and beyond and serve their school and peers. ASUA and GPSC executive officers attend the annual university fees meeting and review fee proposals to ensure the benefit to the students paying the fee. They also voted to put this fee forward for ABOR review/approval.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
U Illinois - Urbana Champaign	Information Sciences	\$ 20,329	\$ 37,779	
University of Arizona	Information Science	13,196.00	37,223.00	15,159.00
U California - Los Angeles	Computer Science	13,564.00	32,572.00	
U Texas - Austin	Computer Science	11,480.00	39,874.00	
U Maryland - College Park	Information Studies	10,779.00	36,891.00	
U Wisconsin - Madison	Data Science	10,746.00	38,634.00	
U North Carolina - Chapel Hill	Information Science	9,018.00	36,000.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 14.0%

Proposed Annual Revenue

Program Fee	\$	\$ 500.00
Number of Students	#	\$ 325
Total Revenue	=	\$ 162,500.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 22,750.00
Administrative Service Charge	\$	\$ 21,577.00
Tutoring Center	\$	\$ 5,000.00
Data Scientist Salary	\$	\$ 87,173.00
Internship coordinator	\$	\$ 26,000.00
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 162,500.00

ISTA Program Fee Purpose

The School of Information recently removed two ISTA course fees in preparation for this program fee and to eliminate costs for the students. The remaining 3 course fees purpose do not overlap with this request. The request for a program fee for BA in Information Science & Arts, BS in Information Science & Technology and BA in Games & Behavior, is to invest in student support that will aid students in their studies and help them gain the tools they need to achieve high-paying jobs after graduating from our programs. As a newer and rapidly growing School with core technical requirements in undergraduate programs, the iSchool has been unable to provide tutoring support for classes across curriculum, such as ISTA 116 (statistics in r), 130 (python), web design courses (Java C), and game development classes (unity). Coding in these courses is a skill that heavily favors 'over the shoulder' learning, where students can interact with peers and ask questions. From the inception of the School, students have asked for more one-on-one support in these technical courses. As the Computer Science department offers its own tutoring program, the main University tutoring center Think Tank has had little incentive or ability to draw from a pool of tutors to offer coding tutoring; however, iSchool students cannot attend Computer Science tutoring, leaving our students without programming tutoring support from either group. We have wonderful instructors and student section leaders, but this is not sufficient to enable time to sit down and go over, for example, every question in a homework assignment with a student. It's heartbreaking to tell a student looking for tutoring in a core requirement that tutoring simply does not exist for the required core classes or the elective courses that they are struggling with - many are left to seek out, find, and pay their own tutors.

A lack of support can reinforce inequities and underrepresentation that continues to plague the computational workforce and tech sector because the students in most need of support cannot find the resources - tutoring, software packages, hardware, etc. - that they need. According to Code.org, "The fields of software, computing, and computer science are plagued by stark underrepresentation by gender, race, ethnicity, geography, and family income. In U.S. high schools, the Advanced Placement exam in Computer Science has historically (since the beginning of the century) had only 22 percent participation by young women, and only 13 percent participation by students from marginalized racial and ethnic groups (Black/African American, Hispanic/Latino/Latina/Latinx, Native American/Alaskan, and Native Hawaiian/Pacific Islanders)," <https://code.org/diversity>. Additionally, money from fees can help support a departmental scholarship for undergraduates which does not currently exist, help keep faculty skill level current, and can provide support for an Internship Coordinator that will help place undergraduate students in successful internships, positions that can lead to future employment opportunities. While placing a small upfront financial burden on our majors, we hope that burden will be balanced with more and better opportunities we can provide students in the School, opportunities that will directly and positively contribute to students' retention, academic success, and professional lives.

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PROGRAM FEE REQUEST - NEW

University: University of Arizona College/School: College of Science
 Department: Chemistry & Biochemistry Program: CHEM BA & BS, BIOC BA & BS

Both Graduate Undergraduate Lower Division Choose One Option

Resident: \$ 50 /semester Effective Date: Fall 2021
 Proposed Fee (this field you may enter other option just by typing it in box)

Non-Resident: \$ 50 /semester Effective Date: Fall 2021
 Proposed Fee (this field you may enter other option just by typing it in box)

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable Differential Tuition:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>13</u>	<u>13</u>
Percent of classes within the program with a fee:	<u>48%</u>	<u>48%</u>

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The program fee revenue will pay for enhanced services and resources to prepare CBC students for successful careers. These resources will benefit students throughout their career, and will be partially supported by lower level fees and partially by upper level fees. A designated faculty member will serve as an undergraduate research coordinator (URC), mentoring students to select a research lab and guiding them toward successful completion of milestones such as the Senior Thesis and poster presentation. This will especially benefit biochemistry majors, who are required to complete a one-year research experience. However, some chemistry majors also participate in research experiences and will also benefit from this resource. The URC will focus on getting more CBC students involved in research and encourage early entry into research. The URC faculty will be given teaching release or additional funds to effectively fulfill this role (see budget for details).

The URC will also implement new workshops specifically geared toward the needs and important skills of CBC students, such as scientific literature navigation, technical writing, scientific presentations, and career preparation. They will invite speakers from the fields of chemistry and biochemistry to provide important perspectives and career advice to students. The recent surge in the use of remote learning will make it possible to engage speakers from outside our immediate geographical area. This will greatly expand our students' awareness of career opportunities and create networking possibilities that did not exist before.

The 13 course fees in the department pay for lab consumables, materials, and other equipment that will not be covered by this program fee.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The program fee revenue will be used to support activities that directly address the students' top concerns:

- 14% will support financial aid set-aside for students that have financial need.
- 60.66% will support hiring the URC: to mentor students and help them identify their research interests, match them with a research advisor, and guide them through the process
- 10% will support workshops and seminars: scientific literature, thesis writing, resume writing, career options, writing grant proposals, internships, pursuing scholarships, applying to graduate/professional schools, etc. This support includes the invited speaker series to broaden student awareness of career options
- 15.44% the University will assess administrative service charge to recover overhead costs incurred by the University. The revenues generated from the Administrative Service Charge (ASC) are used specifically to support overhead costs and administrative services that benefit the entire University, but are not easily assignable to any one unit. Examples include utilities, payroll processing, human resources, information technology, budgeting and procurement.

Since all BS Biochemistry majors are required to complete one year of research, the choice of a research director is a critical decision that can have ramifications on their future career. It is important that students join a lab that suits their interests. Having a faculty member with expertise in the field to guide them in the selection process will ensure they make the best choice. This same faculty member may also teach the majors' seminar course, BIOC 296b or CHEM 395a, depending on their field and the needs of the Department. The cost to fill the faculty member's regular teaching slot with another instructor is \$20,000 per year (or \$10,000 if they are assigned to teach the seminar class) + ERE expenses.

The invited speaker seminar series will be geared toward offering a variety of perspectives to increase student awareness of potential career paths. It will include speakers from industrial, government, and academic labs. Many of these seminars will be conducted remotely. Costs involved with this effort may include travel costs for local speakers as well as event expenses for those seminars that are held in person. Costs for all of these services will be partially covered by the upper-level program fees.

Student Consultation (Please describe the method and outcomes of student consultation)

A survey was administered to all CBC undergraduate students in Fall 2020. Out of 612 CBC majors, 140 (~23%) responded to the survey. The full survey results are provided as an attachment. In summary, 63% of respondents supported the idea of a CBC program fee, as indicated by their responses to Question #3 of the survey.

While students applaud CBC for providing them rich research opportunities and critical analytical skills that prepare them well for graduate school, there are some important areas where students are under-served. Student exit surveys (conducted each semester) indicate a need for improvement in workforce and career preparation, professional skill (e.g., technical writing) development, and providing adequate equipment in teaching labs. These sentiments were echoed in our recent program survey, in which students also expressed a desire for faculty mentor-ship in finding and joining a research lab that aligns with their goals and interests. In the CBC student program survey, we asked what services and/or resources students thought would most benefit them in the program. Student responses are shown graphically in the attached survey report. The top four items the students chose as most useful to help them succeed were (in descending order):

1. Faculty mentoring to help them select and join a research lab
2. Focused career advising
3. Better equipment in the teaching labs
4. Skills workshops such as writing, literature navigation, presentations

Also, the Associated Students of the University of Arizona (ASUA) and the Graduate Professional Student Council (GPSC) are the student government on the University of Arizona campus that is comprised of students who are willing to go above and beyond and serve their school and peers. ASUA and GPSC executive officers attend the annual university fees meeting and review fee proposals to ensure the benefit to the students paying the fee. They also voted to put this fee forward for ABOR review/approval.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
University of Illinois at Urbana-Champaign	BS Chemistry, BS Biochemistry	\$ 17,258	\$ 34,708	
University of Minnesota-Twin Cities	BS Chemistry	17,142.00	35,440.00	
University of Minnesota-Twin Cities	BS Biochemistry	15,142.00	33,440.00	
Michigan State University	BS Biochemistry & Molecular Biology; BA/BS Chemistry	14,460.00	39,776.00	
University of California-Los Angeles	BS Chemistry, BS Biochemistry	13,239.00	36,767.00	
University of Arizona	BA/BS Chemistry, BA/BS Biochemistry	12,996.00	37,023.00	
Texas A & M University	BA/BS Biochemistry	12,070.00	39,411.00	
Texas A & M University	BA/BS Chemistry	11,728.00	39,068.00	
University of Texas at Austin	BS Chemistry, BS Biochemistry	11,480.00	39,874.00	
University of Wisconsin-Madison	BA/BS Chemistry, BS Biochemistry	10,742.00	38,630.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 14.0%

Proposed Annual Revenue

Program Fee	\$	\$ 100.00
Number of Students	#	\$ 291
Total Revenue	=	\$ 29,100.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 4,074.00
Administrative Service Charge	\$	\$ 3,864.00
Undergraduate research coordinator salary	\$	\$ 18,162.00
Career & professional development workshops	\$	\$ 3,000.00
	\$	
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 29,100.00

Default Report

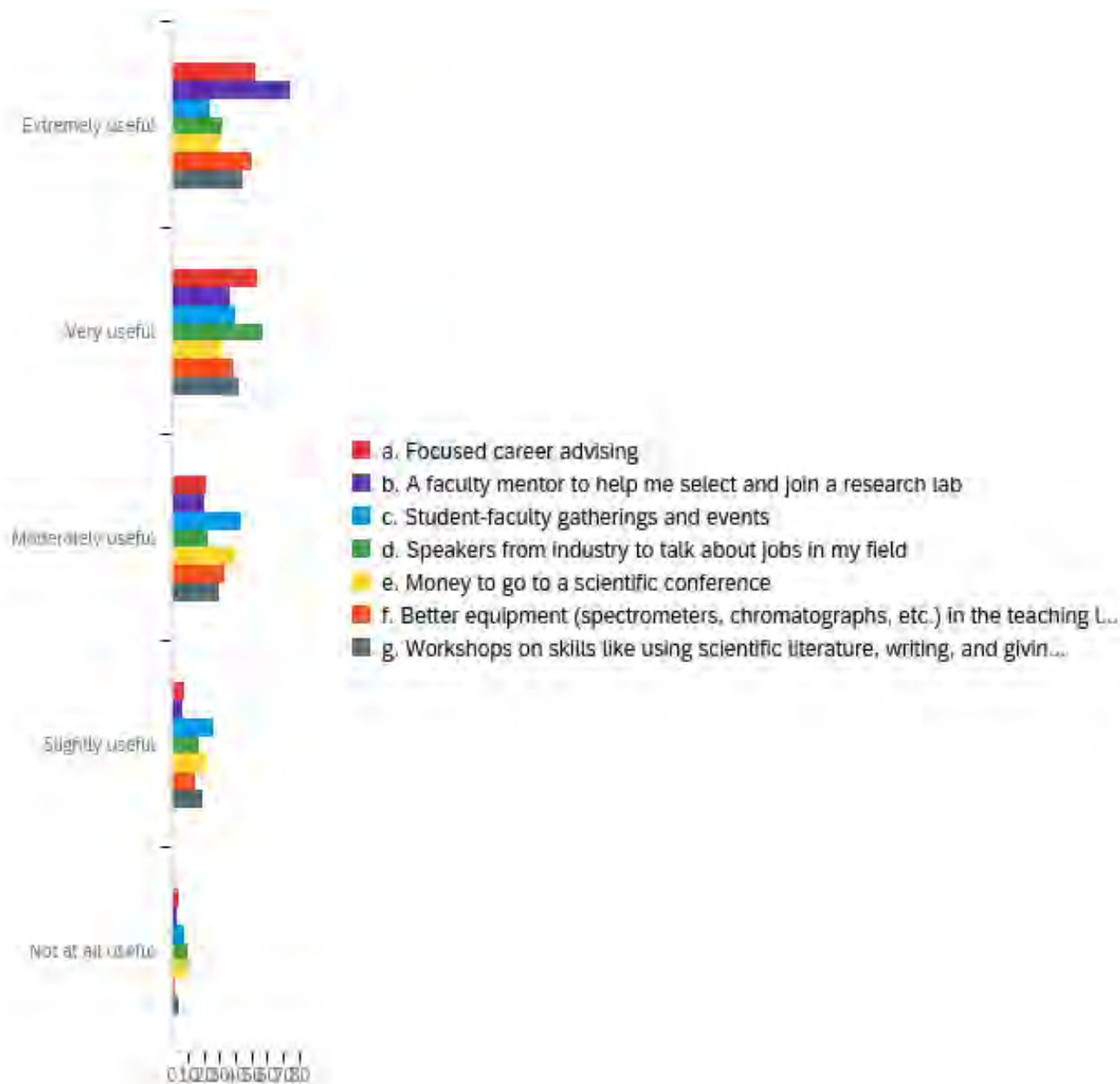
CBC undergraduate program survey

November 5th 2020, 1:22 pm MST

Q_RecaptchaScore

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Q_RecaptchaScore	0.10	0.90	0.87	0.09	0.01	141

Q1 - How useful do you feel each of the following would be in helping you succeed as a CBC undergraduate student?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	a. Focused career advising	1.00	5.00	1.97	1.01	1.01	140
2	b. A faculty mentor to help me select and join a research lab	1.00	5.00	1.76	0.99	0.98	140
3	c. Student-faculty gatherings and events	1.00	5.00	2.66	1.11	1.24	140
4	d. Speakers from industry to talk about jobs in my field	1.00	5.00	2.40	1.17	1.38	139

5	e. Money to go to a scientific conference	1.00	5.00	2.65	1.23	1.52	138
6	f. Better equipment (spectrometers, chromatographs, etc.) in the teaching labs	1.00	5.00	2.14	1.07	1.14	139
7	g. Workshops on skills like using scientific literature, writing, and giving presentations	1.00	5.00	2.24	1.13	1.28	139

#	Question	Extremely useful		Very useful		Moderately useful		Slightly useful		Not at all useful		Total
1	a. Focused career advising	37.86%	53	38.57%	54	15.00%	21	5.71%	8	2.86%	4	140
2	b. A faculty mentor to help me select and join a research lab	53.57%	75	25.71%	36	14.29%	20	4.29%	6	2.14%	3	140
3	c. Student-faculty gatherings and events	17.14%	24	28.57%	40	30.71%	43	18.57%	26	5.00%	7	140
4	d. Speakers from industry to talk about jobs in my field	23.02%	32	41.01%	57	16.55%	23	12.23%	17	7.19%	10	139
5	e. Money to go to a scientific conference	22.46%	31	23.19%	32	29.71%	41	15.94%	22	8.70%	12	138
6	f. Better equipment (spectrometers, chromatographs, etc.) in the teaching labs	35.97%	50	28.06%	39	23.74%	33	10.79%	15	1.44%	2	139
7	g. Workshops on skills like using scientific literature, writing, and giving presentations	32.37%	45	30.22%	42	20.86%	29	13.67%	19	2.88%	4	139

Q2 - What additional resources you would like CBC to offer for you to be successful?

What additional resources you would like CBC to offer for you to be successful?

I would love to be able to go to scientific conferences or to have a faculty mentor to help me select and join a research lab.

Unsure

Other ways to gain experience in the field outside of working in a research lab

More thorough explanations of lab spectrums and more 1 on 1 help to better be able to run a procedures alone

I think resources on the many lab techniques that are used would be helpful. And I also think more independent procedure creation to work on labs instead of following a procedure.

more peer support and a set up for peer groups (like the cohorts in education)

Shadowing opportunities in our choice of job field

Even more research/lab assistance/opportunities

More focus on analytical chemistry/ real world chemistry than biochemistry topics

More interesting and diverse elective courses that are consistently offered.

Professional communication courses.

Our college advisors are fabulous and I love them but a person dedicated to students on the grad school path to help with that process (picking and applying) would be super useful

I hated my CBC experience. I don't feel like I was ever appreciated or acknowledged. The upper division biochemistry professors were rude and completely disregarding of undergrad biochem majors. My experience at the U of A, on top of the astronomical cost of tuition, has solidified my decision to never go to any college in the United States. I will be moving overseas for an affordable, caring higher education.

I would like to mainly focus on career advising and speakers from my preferred industry.

None other than those listed above

There should be something like industry-academia cooperation/collaboration during undergraduate. The university isn't for philosophy anymore. Most of it is for preparing a person to be able to contribute to the world by work. Only very very few percentage of people do real scholar research. Therefore, an industrial experiment should be imported by uni/faculty/instructor. Time to jump out of the textbook.

None I can think of per-se. SciFinder is semi limited although if signed in google under UA, specific sites like Science Direct

Research advisors

Career advising from scientists of color

More advising plans (4 year plans) or even accelerated plans to graduate earlier

N/A

Workshops or 1 on 1 assistance for honing research skills.

Support 463a. It definitely taught the most career applicable material for a biochemist.

Options after getting bachelor's degree

NA

A niche gripe, but flexibility in incorporating interdepartmental research into the BS/MS program. Besides that, the above programs are excellent ideas and I look forward to their implementation.

N/A

I think a committee of mentors, just like a club, who can update us on more things than just advisors' email would be helpful cuz we can receive more information about labs, opportunities.

N/A

MA

N/A

more lab experiences

more guidance in how to either take more organized notes (online school, lecture, learning material) is very unorganized and I am having a hard time figuring out how to study on my own.

More opportunities to speak with mentors and other faculty in order to get better ideas of what to pursue following graduation.

More and earlier guidance to thesis. Also, career focused survey classes, like forensic science would be cool, so that we can have a trial run for careers that might interest us. I understand if there isn't enough money for that though, I didn't know labs didn't get tuition funding (I think they should, just like any classroom)!

Possible tutoring help

Organized laboratory curriculum in higher lab teaching classes, encouraged semester meetings with assigned faculty research mentor

Colloquium 395 course ought to be more useful. Also more seminar talks from non-academics

I would like better help and advise from my CBC advisor as I feel as though every question I ask is only generally addressed rather than giving me any kind of helpful direction. I have asked numerous specific questions about classes and have received incorrect information about my transfer credit.

N/A

N/A

Not sure, Maybe expansion of CBC course related think tank tutoring hours and access

Especially in Chem labs stop using extremely old techniques and chemical reactions, there is much more applicable chemical reactions that modern labs use (suzuki, cycloadditon, click chemistry, etc). Learning Grignard's is useless.

N/A

I will transfer to a different school and finish my degree there if this school dreams of spending that much money on football and not that much money on my education. Why doesn't tuition cover my lab experiences? What kind of joke is this?

I think the CBC does a wonderful job in promoting the success of their students. It would be nice to see more cohesion between the major and better equipment in labs.

I feel like the courses we have cover most of this and if we have questions about events, research labs, conferences, etc. we can ask current faculty. It seems redundant to offer this.

more seminars/informational seminars of the summer internship/research programs for undergraduates

I think CBC gives students a lot of good resources now really, it's hard to take advantage of them since everything is virtual but there are still good resources

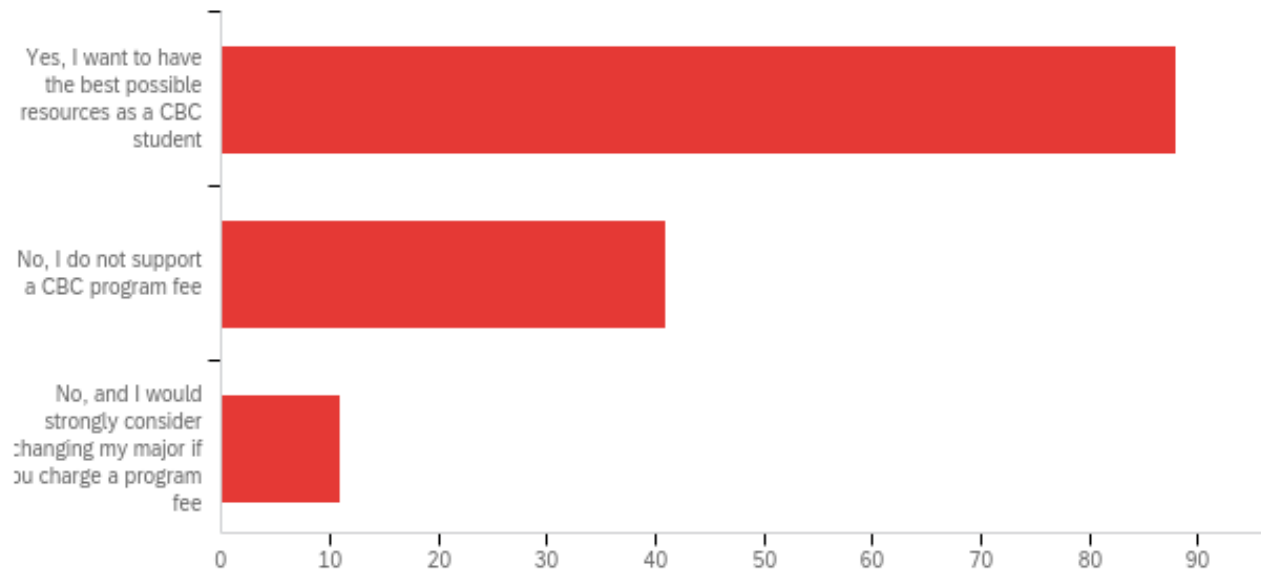
N/A

Tutoring for higher level courses

Additional resources to assist in lab with regards to report writing and data analysis. The expectations for what students are to do with almost no information/instruction is unreasonable at times. More guidance/resources would be great.

Help on graduate admissions starting end of Junior year, I have no idea what I am doing

Q3 - If the above resources were to result in a CBC program fee (\$50-\$150/semester, would you support paying this additional fee?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	If the above resources were to result in a CBC program fee (\$50-\$150/semester, would you support paying this additional fee?	1.00	3.00	1.45	0.64	0.40	140

#	Answer	%	Count
1	Yes, I want to have the best possible resources as a CBC student	62.86%	88
2	No, I do not support a CBC program fee	29.29%	41
3	No, and I would strongly consider changing my major if you charge a program fee	7.86%	11
	Total	100%	140

Market Pricing

Comparison of our tuition with peer institutions (Table 1) shows that addition of the program fee does not affect our competitive pricing. In fact, the programs in Table 1 with lower resident tuition have higher non-resident rates. We selected peer universities with similar size programs (based on ACS degree data) and similar rankings. It is important to note that the University of Arizona is currently ranked #10 in the US in analytical chemistry by US News & World Report. Several of the programs in Table 1 are also in the top ten analytical programs. To remain competitive in this area, it is crucial that we offer state-of-the-art analytical instrumentation in our teaching labs—one of the principal objectives of this program fee.

Table 1. Comparison with peer institutions. Values in yellow are higher than UA tuition values.

Institution	Degree program	Resident tuition	Requested fee	Resident total	Non-resident tuition	Requested fee	Non-resident total
University of Illinois at Urbana-Champaign	BS Chemistry, BS Biochemistry	\$17,258.00		\$17,258.00	\$34,708.00		\$34,708.00
University of Minnesota-Twin Cities	BS Chemistry	\$17,142.00		\$17,142.00	\$35,440.00		\$35,440.00
University of Minnesota-Twin Cities	BS Biochemistry	\$15,142.00		\$15,142.00	\$33,440.00		\$33,440.00
Michigan State University	BS Biochemistry & Molecular Biology; BA/BS Chemistry	\$14,460.00		\$14,460.00	\$39,776.00		\$39,776.00
University of California-Los Angeles	BS Chemistry, BS Biochemistry	\$13,239.00		\$13,239.00	\$36,767.00		\$36,767.00
University of Arizona	BA/BS Chemistry, BA/BS Biochemistry	\$12,696.00	\$100.00 (l) \$300.00 (u)	\$12,996.00	\$36,723.00	\$300.00	\$37,023.00
Texas A & M University	BA/BS Biochemistry	\$12,070.00		\$12,070.00	\$39,411.00		\$39,411.00
Texas A & M University	BA/BS Chemistry	\$11,728.00		\$11,728.00	\$39,068.00		\$39,068.00
University of Texas at Austin	BS Chemistry, BS Biochemistry	\$11,480.00		\$11,480.00	\$39,874.00		\$39,874.00
University of Wisconsin-Madison	BA/BS Chemistry, BS Biochemistry	\$10,742.00		\$10,742.00	\$38,630.00		\$38,630.00

The program fee is not expected to negatively affect student demand for our programs. Only a small percentage of the students in our survey indicated that they would consider changing majors due to the fee. We believe that the program enhancements provided by this fee will increase student satisfaction and make them better prepared for their careers. This in turn will lead to better opportunities for them upon graduation.



PROGRAM FEE REQUEST - NEW

University: University of ArizonaCollege/School: College of ScienceDepartment: Chemistry & BiochemistryProgram: CHEM BA & BS, BIOC BA & BS Both Graduate Undergraduate Lower Division

Choose One Option

Resident:

\$ 50

/semester

Proposed Fee

Effective Date: Fall2021

(this field you may enter other option just by typing it in box)

Non-Resident:

\$ 50

/semester

Proposed Fee

Effective Date: Fall2021

(this field you may enter other option just by typing it in box)

Other Applicable Fees in School/Program

Resident:

Non-Resident:

Applicable Differential Tuition:

00

Number of classes within the program with a fee:

1313

Percent of classes within the program with a fee:

48%48%

Purpose (Please provide a brief statement detailing the purpose of the tuition, including the anticipated expenditures of tuition revenue and benefits the tuition will provide students.)

The program fee revenue will pay for enhanced services and resources to prepare CBC students for successful careers. These resources will benefit students throughout their career, and will be partially supported by lower level fees and partially by upper level fees. A designated faculty member will serve as an undergraduate research coordinator (URC), mentoring students to select a research lab and guiding them toward successful completion of milestones such as the Senior Thesis and poster presentation. This will especially benefit biochemistry majors, who are required to complete a one-year research experience. However, some chemistry majors also participate in research experiences and will also benefit from this resource. The URC will focus on getting more CBC students involved in research and encourage early entry into research. The URC faculty will be given teaching release or additional funds to effectively fulfill this role (see budget for details).

The URC will also implement new workshops specifically geared toward the needs and important skills of CBC students, such as scientific literature navigation, technical writing, scientific presentations, and career preparation. They will invite speakers from the fields of chemistry and biochemistry to provide important perspectives and career advice to students. The recent surge in the use of remote learning will make it possible to engage speakers from outside our immediate geographical area. This will greatly expand our students' awareness of career opportunities and create networking possibilities that did not exist before.

The 13 course fees in the department pay for lab consumables, materials, and other equipment that will not be covered by this program fee.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The program fee revenue will be used to support activities that directly address the students' top concerns:

- 14% will support financial aid set-aside for students that have financial need.
- 60.66% will support hiring the URC: to mentor students and help them identify their research interests, match them with a research advisor, and guide them through the process
- 10% will support workshops and seminars: scientific literature, thesis writing, resume writing, career options, writing grant proposals, internships, pursuing scholarships, applying to graduate/professional schools, etc. This support includes the invited speaker series to broaden student awareness of career options
- 15.44% the University will assess administrative service charge to recover overhead costs incurred by the University. The revenues generated from the Administrative Service Charge (ASC) are used specifically to support overhead costs and administrative services that benefit the entire University, but are not easily assignable to any one unit. Examples include utilities, payroll processing, human resources, information technology, budgeting and procurement.

Since all BS Biochemistry majors are required to complete one year of research, the choice of a research director is a critical decision that can have ramifications on their future career. It is important that students join a lab that suits their interests. Having a faculty member with expertise in the field to guide them in the selection process will ensure they make the best choice. This same faculty member may also teach the majors' seminar course, BIOC 296b or CHEM 395a, depending on their field and the needs of the Department. The cost to fill the faculty member's regular teaching slot with another instructor is \$20,000 per year (or \$10,000 if they are assigned to teach the seminar class) + ERE expenses.

The invited speaker seminar series will be geared toward offering a variety of perspectives to increase student awareness of potential career paths. It will include speakers from industrial, government, and academic labs. Many of these seminars will be conducted remotely. Costs involved with this effort may include travel costs for local speakers as well as event expenses for those seminars that are held in person. Costs for all of these services will be partially covered by the upper-level program fees.

Student Consultation (Please describe the method and outcomes of student consultation)

A survey was administered to all CBC undergraduate students in Fall 2020. Out of 612 CBC majors, 140 (~23%) responded to the survey. The full survey results are provided as an attachment. In summary, 63% of respondents supported the idea of a CBC program fee, as indicated by their responses to Question #3 of the survey.

While students applaud CBC for providing them rich research opportunities and critical analytical skills that prepare them well for graduate school, there are some important areas where students are under-served. Student exit surveys (conducted each semester) indicate a need for improvement in workforce and career preparation, professional skill (e.g., technical writing) development, and providing adequate equipment in teaching labs. These sentiments were echoed in our recent program survey, in which students also expressed a desire for faculty mentor-ship in finding and joining a research lab that aligns with their goals and interests. In the CBC student program survey, we asked what services and/or resources students thought would most benefit them in the program. Student responses are shown graphically in the attached survey report. The top four items the students chose as most useful to help them succeed were (in descending order):

1. Faculty mentoring to help them select and join a research lab
2. Focused career advising
3. Better equipment in the teaching labs
4. Skills workshops such as writing, literature navigation, presentations

Also, the Associated Students of the University of Arizona (ASUA) and the Graduate Professional Student Council (GPSC) are the student government on the University of Arizona campus that is comprised of students who are willing to go above and beyond and serve their school and peers. ASUA and GPSC executive officers attend the annual university fees meeting and review fee proposals to ensure the benefit to the students paying the fee. They also voted to put this fee forward for ABOR review/approval.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
University of Illinois at Urbana-Champaign	BS Chemistry, BS Biochemistry	\$ 17,258	\$ 34,708	
University of Minnesota-Twin Cities	BS Chemistry	17,142.00	35,440.00	
University of Minnesota-Twin Cities	BS Biochemistry	15,142.00	33,440.00	
Michigan State University	BS Biochemistry & Molecular Biology; BA/BS Chemistry	14,460.00	39,776.00	
University of California-Los Angeles	BS Chemistry, BS Biochemistry	13,239.00	36,767.00	
University of Arizona	BA/BS Chemistry, BA/BS Biochemistry	12,996.00	37,023.00	
Texas A & M University	BA/BS Biochemistry	12,070.00	39,411.00	
Texas A & M University	BA/BS Chemistry	11,728.00	39,068.00	
University of Texas at Austin	BS Chemistry, BS Biochemistry	11,480.00	39,874.00	
University of Wisconsin-Madison	BA/BS Chemistry, BS Biochemistry	10,742.00	38,630.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 14.0%

Proposed Annual Revenue

Program Fee	\$	\$ 100.00
Number of Students	#	\$ 291
Total Revenue	=	\$ 29,100.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 4,074.00
Administrative Service Charge	\$	\$ 3,864.00
Undergraduate research coordinator salary	\$	\$ 18,162.00
Career & professional development workshops	\$	\$ 3,000.00
	\$	
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 29,100.00

Default Report

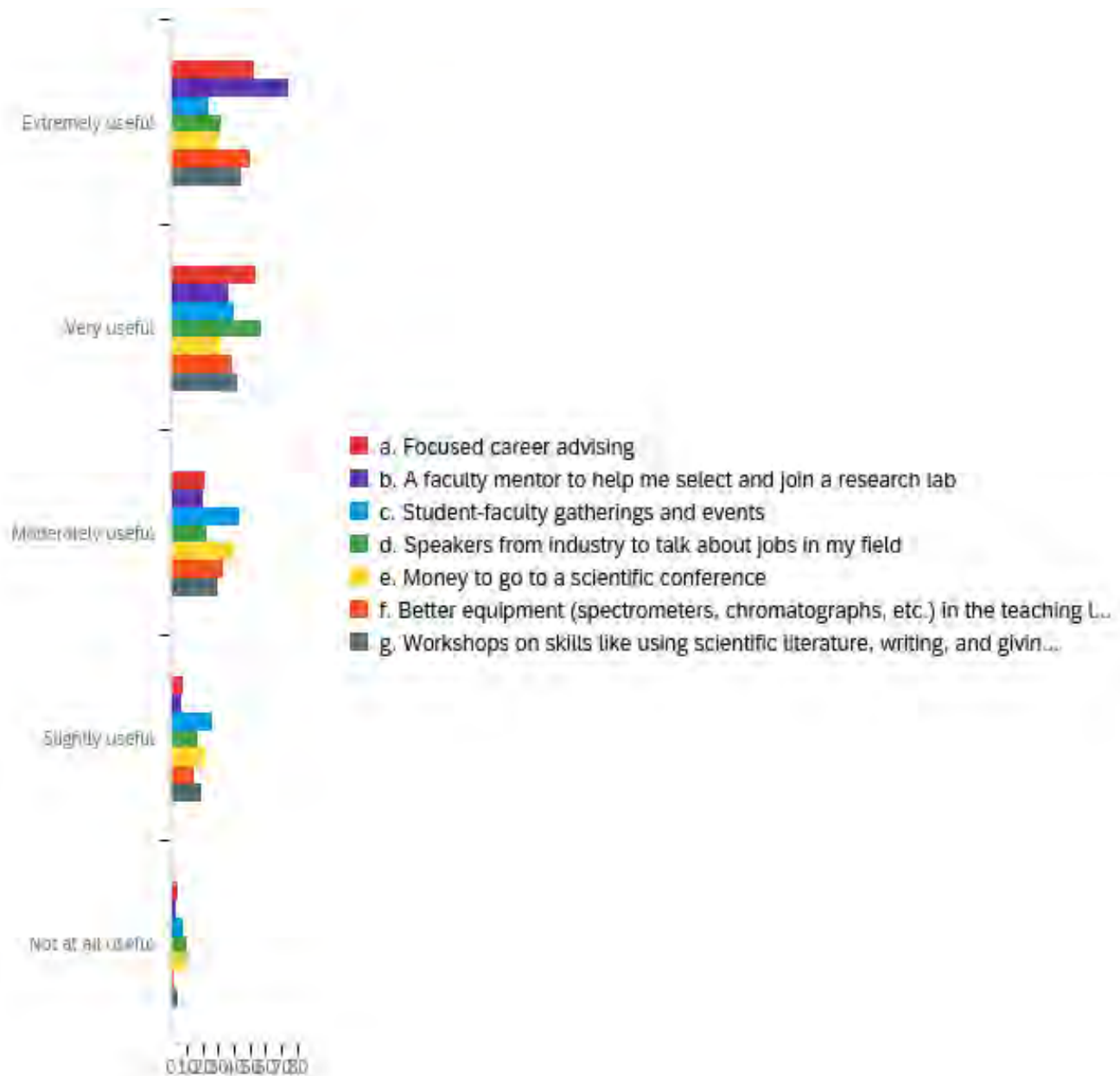
CBC undergraduate program survey

November 5th 2020, 1:22 pm MST

Q_RecaptchaScore

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Q_RecaptchaScore	0.10	0.90	0.87	0.09	0.01	141

Q1 - How useful do you feel each of the following would be in helping you succeed as a CBC undergraduate student?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	a. Focused career advising	1.00	5.00	1.97	1.01	1.01	140
2	b. A faculty mentor to help me select and join a research lab	1.00	5.00	1.76	0.99	0.98	140
3	c. Student-faculty gatherings and events	1.00	5.00	2.66	1.11	1.24	140
4	d. Speakers from industry to talk about jobs in my field	1.00	5.00	2.40	1.17	1.38	139

5	e. Money to go to a scientific conference	1.00	5.00	2.65	1.23	1.52	138
6	f. Better equipment (spectrometers, chromatographs, etc.) in the teaching labs	1.00	5.00	2.14	1.07	1.14	139
7	g. Workshops on skills like using scientific literature, writing, and giving presentations	1.00	5.00	2.24	1.13	1.28	139

#	Question	Extremely useful		Very useful		Moderately useful		Slightly useful		Not at all useful		Total
1	a. Focused career advising	37.86%	53	38.57%	54	15.00%	21	5.71%	8	2.86%	4	140
2	b. A faculty mentor to help me select and join a research lab	53.57%	75	25.71%	36	14.29%	20	4.29%	6	2.14%	3	140
3	c. Student-faculty gatherings and events	17.14%	24	28.57%	40	30.71%	43	18.57%	26	5.00%	7	140
4	d. Speakers from industry to talk about jobs in my field	23.02%	32	41.01%	57	16.55%	23	12.23%	17	7.19%	10	139
5	e. Money to go to a scientific conference	22.46%	31	23.19%	32	29.71%	41	15.94%	22	8.70%	12	138
6	f. Better equipment (spectrometers, chromatographs, etc.) in the teaching labs	35.97%	50	28.06%	39	23.74%	33	10.79%	15	1.44%	2	139
7	g. Workshops on skills like using scientific literature, writing, and giving presentations	32.37%	45	30.22%	42	20.86%	29	13.67%	19	2.88%	4	139

Q2 - What additional resources you would like CBC to offer for you to be successful?

What additional resources you would like CBC to offer for you to be successful?

I would love to be able to go to scientific conferences or to have a faculty mentor to help me select and join a research lab.

Unsure

Other ways to gain experience in the field outside of working in a research lab

More thorough explanations of lab spectrums and more 1 on 1 help to better be able to run a procedures alone

I think resources on the many lab techniques that are used would be helpful. And I also think more independent procedure creation to work on labs instead of following a procedure.

more peer support and a set up for peer groups (like the cohorts in education)

Shadowing opportunities in our choice of job field

Even more research/lab assistance/opportunities

More focus on analytical chemistry/ real world chemistry than biochemistry topics

More interesting and diverse elective courses that are consistently offered.

Professional communication courses.

Our college advisors are fabulous and I love them but a person dedicated to students on the grad school path to help with that process (picking and applying) would be super useful

I hated my CBC experience. I don't feel like I was ever appreciated or acknowledged. The upper division biochemistry professors were rude and completely disregarding of undergrad biochem majors. My experience at the U of A, on top of the astronomical cost of tuition, has solidified my decision to never go to any college in the United States. I will be moving overseas for an affordable, caring higher education.

I would like to mainly focus on career advising and speakers from my preferred industry.

None other than those listed above

There should be something like industry-academia cooperation/collaboration during undergraduate. The university isn't for philosophy anymore. Most of it is for preparing a person to be able to contribute to the world by work. Only very very few percentage of people do real scholar research. Therefore, an industrial experiment should be imported by uni/faculty/instructor. Time to jump out of the textbook.

None I can think of per-se. SciFinder is semi limited although if signed in google under UA, specific sites like Science Direct

Research advisors

Career advising from scientists of color

More advising plans (4 year plans) or even accelerated plans to graduate earlier

N/A

Workshops or 1 on 1 assistance for honing research skills.

Support 463a. It definitely taught the most career applicable material for a biochemist.

Options after getting bachelor's degree

NA

A niche gripe, but flexibility in incorporating interdepartmental research into the BS/MS program. Besides that, the above programs are excellent ideas and I look forward to their implementation.

N/A

I think a committee of mentors, just like a club, who can update us on more things than just advisors' email would be helpful cuz we can receive more information about labs, opportunities.

N/A

MA

N/A

more lab experiences

more guidance in how to either take more organized notes (online school, lecture, learning material) is very unorganized and I am having a hard time figuring out how to study on my own.

More opportunities to speak with mentors and other faculty in order to get better ideas of what to pursue following graduation.

More and earlier guidance to thesis. Also, career focused survey classes, like forensic science would be cool, so that we can have a trial run for careers that might interest us. I understand if there isn't enough money for that though, I didn't know labs didn't get tuition funding (I think they should, just like any classroom)!

Possible tutoring help

Organized laboratory curriculum in higher lab teaching classes, encouraged semester meetings with assigned faculty research mentor

Colloquium 395 course ought to be more useful. Also more seminar talks from non-academics

I would like better help and advise from my CBC advisor as I feel as though every question I ask is only generally addressed rather than giving me any kind of helpful direction. I have asked numerous specific questions about classes and have received incorrect information about my transfer credit.

N/A

N/A

Not sure, Maybe expansion of CBC course related think tank tutoring hours and access

Especially in Chem labs stop using extremely old techniques and chemical reactions, there is much more applicable chemical reactions that modern labs use (suzuki, cycloadditon, click chemistry, etc). Learning Grignard's is useless.

N/A

I will transfer to a different school and finish my degree there if this school dreams of spending that much money on football and not that much money on my education. Why doesn't tuition cover my lab experiences? What kind of joke is this?

I think the CBC does a wonderful job in promoting the success of their students. It would be nice to see more cohesion between the major and better equipment in labs.

I feel like the courses we have cover most of this and if we have questions about events, research labs, conferences, etc. we can ask current faculty. It seems redundant to offer this.

more seminars/informational seminars of the summer internship/research programs for undergraduates

I think CBC gives students a lot of good resources now really, it's hard to take advantage of them since everything is virtual but there are still good resources

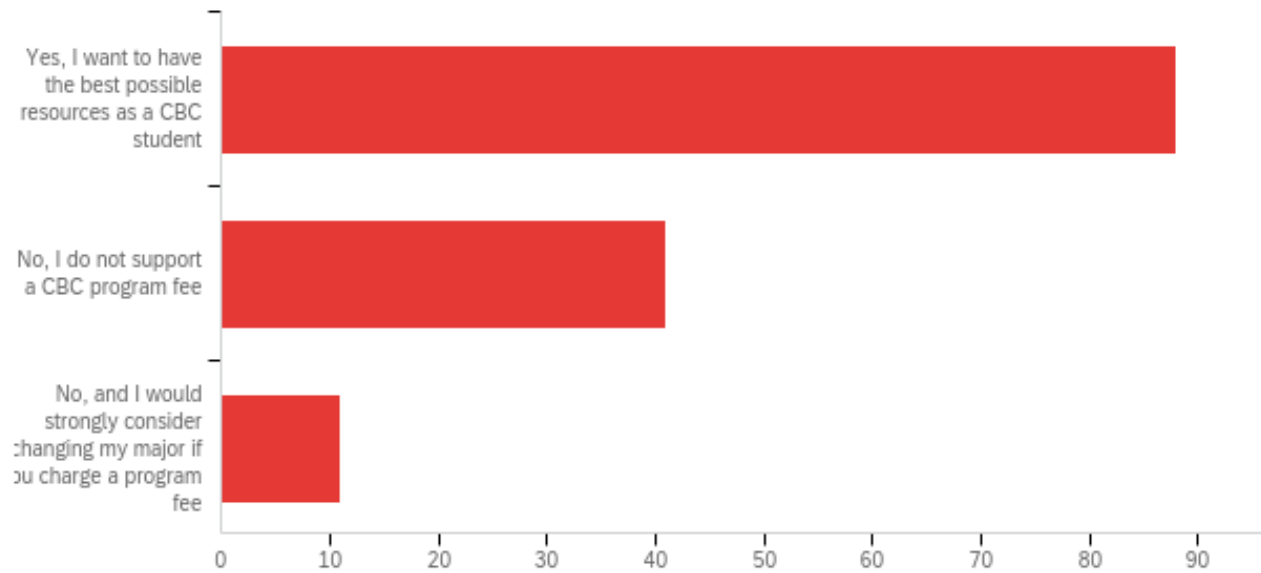
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Tutoring for higher level courses

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Help on graduate admissions starting end of Junior year, I have no idea what I am doing

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#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
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Table 1. Comparison with peer institutions. Values in yellow are higher than UA tuition values.

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The program fee is not expected to negatively affect student demand for our programs. Only a small percentage of the students in our survey indicated that they would consider changing majors due to the fee. We believe that the program enhancements provided by this fee will increase student satisfaction and make them better prepared for their careers. This in turn will lead to better opportunities for them upon graduation.



PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: University of Arizona College/School: Honors College

Department: N/A Program: Multiple

Both
 Graduate
 Undergraduate
 Both
 Choose One Option

Resident:
 \$ 250 /semester
 \$ 475 /semester
 Effective Date:
 Fall
 2021
 Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Non-Resident:
 \$ 250 /semester
 \$ 475 /semester
 Effective Date:
 Fall
 2021
 Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Program Fee History:		Most Recent Date & Change to fee (Date/Amount)		
Resident:				
Date Fee Established	Fall 2010	and original amount	\$ 250	Fall 2010 \$ 250
		Most Recent Date & Change to fee (Date/Amount)		
Non-Resident:				
Date Fee Established	Fall 2010	and original amount	\$ 250	Fall 2010 \$ 250

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>1</u>	<u>1</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

We reported above 0 differential tuition amount as our Honors College students come from multiple programs and colleges, is impossible to list all of them, there are no additional program fees or differential tuition within the Honors College.

An increase in the Honors College fee will support continuing and improved academic programming, student retention, experience, and overall success. The Honors fee was initiated in 2010 at \$500/year and has remained at this level despite growth in the College and expansion of student support and programming. An increase of \$475/term (i.e., \$950/year total) will support needed changes in response to issue consistently raised in student feedback. To best serve our high-achieving students and enhance their academic and curricular experience, the incremental revenue from the fee increase will enable (and fund) efforts described below under Justification.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

With the honors fee in place at \$950/year, we are projecting a net revenue of \$2,634,890. We will further support students in the following ways:

- An estimated \$1,660,000 of it will be used to support staff expenses including hiring a new advisor and a new faculty member. Providing additional staffing support for the Office of Nationally Competitive Scholarships enabling more mentoring support. We also plan on increasing salaries 2% annually beginning Fall 2022.
- Additionally, we plan to use \$ 500,000 of fee funds to pay stipends to faculty teaching Honors courses as well as cover any extracurricular activities. This will enable us to greatly expand the number of Honors sections of courses across campus. This includes courses within majors, minors and in the general education program.
- We will use \$100,000 of fee funding to offer more student scholarships. Provide more support for students to get into research, support summer research opportunities and complete the Honors thesis.

We are budgeting approximately \$200,000 of operating expenses and \$174,000 in student programming for the following:

- Establish an Honors Faculty Fellows program that will serve students by providing direct faculty-student connections that can result in research projects, mentoring, out of classroom experiences, and new Honors sections of key courses.
- Provide further development/support for PATH peer mentoring program to provide additional leadership/mentorship training for mentors and more opportunities for mentees.
- Provide support to leadership council of Honors student club and organization leaders.
- Increase the amount internship and professional development opportunities and support.
- Creation of a sophomore year experience called "Accelerate" that is a one-credit experience designed to propel students toward creating an individualized Honors plan.
- Establish more programming and support for student well-being and mental health. This includes partnering with CAPS to develop a program where Honors College will provide financial support for Honors students to use CAPS services.
- Provide additional funds to support study abroad and develop an Honors Global Scholars pathway.
- Further support students participating in Alternative Spring Break service-learning.
- Establish funds for supporting service-learning opportunities for Honors students.

Student Consultation (Please describe the method and outcomes of student consultation)

See attached.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
University of Oregon	Clark Honors College	\$ 2,781	\$ 2,781	
Arizona State	Barrett Honors College	2,000.00	2,000.00	
University of Arizona	Honors College	950.00	950.00	
Northern Arizona	Honors College	700.00	700.00	
University of Florida		80.00	80.00	
University of North Carolina	Chapel Hill	0.00	0.00	

BUDGET

Financial Aid Set Aside (FSA) Amount: 18.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 950.00
Number of Students	#	\$ 4,000
Total Revenue	=	\$ 3,800,000.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 684,000.00
Administrative Service Charge	\$	\$ 481,110.00
Support Staff Expenses (with ERE)	\$	\$ 1,660,052.00
Operating Expenses	\$	\$ 200,000.00
Student Services (Scholarships)	\$	\$ 100,000.00
Other-Expanding student programming (student	\$	\$ 174,838.00
Faculty Personnel Expenses-outside college par	\$	\$ 500,000.00
	\$	
	\$	
Total Program Costs	=	\$ 3,800,000.00

Honors College - Student Consultation

Over the past three years, with new senior leadership in Dean Terry Hunt and Associate Dean for Academic Affairs, John Pollard, the Honors College has held several student focus groups and conducted surveys to identify students concerns. Student feedback has revealed consistent themes and particular issues that demand attention (as detailed above).

In Fall 2020, to better define and represent issues that have emerged from students over time, the Honors College conducted two college-wide surveys: one addressing co-curricular priorities and the other, academic issues facing students. The second academic survey explicitly addressed the fee increase and allowed us to frame student challenges and opportunities in planning and best use of additional fee revenue.

The academic survey given to all current Honors college students showed strong student support for increased grant and scholarship aid, internships (particularly credit-bearing), as well as greater choice and reliability in honors course offerings, including those offered across different majors. Students also strongly supported growing partnerships (e.g., with College of Medicine), greater support for thesis preparation and completion, building more in-depth relationships with faculty, and a variety of expanded or new co-curricular programming. Also supported in the survey: online honors courses, greater study abroad opportunities, more course offerings within the College (HNRS courses), increased academic advising, activities and social events fostering community, and creating new interdisciplinary honors minors. Student priorities guided decisions for best utilizing fee revenue.

In the same academic survey, students responded to the fee increase. While strongly supporting the proposed continued and enhanced programming, students lamented the fee, and sometimes in strong dissent.

In planning the fee increase proposal, Honors College leadership held meetings with two important student groups: Honors College Ambassadors and members of the peer mentoring program ("PATH" Mentors). Both meetings educed critical discussion, support, and skepticism over the fee increase proposal. Students primarily expressed concern over access for students with financial need. Other students lauded efforts to increase honors course offerings and increase faculty engagement in the College. No one wants costs to rise, but several students have expressed their understanding about the critical needs of the College.

Finally, Honors College leadership extended an open invitation to meet with students. In these meetings, students shared their strong commitment and contentment with the College. They also offered comments in support of plans to make changes with the fee increase.

Also, the Associated Students of the University of Arizona (ASUA) and the Graduate Professional Student Council (GPSC) are the student government on the University of Arizona campus that is comprised of students who are willing to go above and beyond and serve their school and peers. ASUA and GPSC executive officers attend the annual university fees meeting and review fee proposals to ensure the benefit to the students paying the fee. They also voted to put this fee forward for ABOR review/approval.

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PROGRAM FEE REQUEST - CHANGE TO EXISTING

University: University of Arizona College/School: College of Architecture, Planning and Landscape Architecture

Department: School of Landscape Architecture Program: Graduate Certificate in Heritage Conservation

Both
 Graduate
 Undergraduate

Resident:
 \$ 200 /credit
 \$ 0 /credit
 Effective Date: Fall
 2021
(this field you may enter other option just by typing it in box)
Current Rate Proposed Rate

Non-Resident:
 \$ 200 /credit
 \$ 0 /credit
 Effective Date: Fall
 2021
(this field you may enter other option just by typing it in box)
Current Rate Proposed Rate

Program Fee History:			Most Recent Date & Change to fee (Date/Amount)		
Resident:					
Date Fee Established	<u>Fall</u>	<u>2012</u>	and original amount	<u>\$ 200</u>	<u>Fall</u> <u>2012</u> <u>\$ 200</u>
			Most Recent Date & Change to fee (Date/Amount)		
Non-Resident:					
Date Fee Established	<u>Fall</u>	<u>2012</u>	and original amount	<u>\$ 200</u>	<u>Fall</u> <u>2012</u> <u>\$ 200</u>

Other Applicable Fees in School/Program	Resident:	Non-Resident:
Applicable differential tuition amount:	<u>0</u>	<u>0</u>
Number of classes within the program with a fee:	<u>0</u>	<u>0</u>
Percent of classes within the program with a fee:	<u>0%</u>	<u>0%</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

This Graduate Certificate in Heritage Conservation program will be moving fully online in Fall 2021, therefore there is no need for the program fee.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The online program option price will be set without the need to offset with fees.

Student Consultation (Please describe the method and outcomes of student consultation)

Fees are being removed because the program is moving online.

MARKET PRICING

Institution	Degree	Annual Price		
		Resident	Nonresident	Online
NA				

BUDGET

Financial Aid Set Aside (FSA) Amount: 0.0%

Proposed Annual Revenue

Program Fee Amount	\$	\$ 0.00
Number of Students	#	
Total Revenue	=	\$ 0.00

Proposed Annual Expenditures

Financial Aid Set Aside	\$	\$ 0.00
Administrative Service Charge	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
Total Program Costs	=	\$ 0.00

CLASS FEE REQUEST - NEW

University: University of Arizona College/School: College of Ag. & Life Sciences
 Class Number: ACBS 497B Department: Animal & Biomedical Sciences
 Class Title: Applied Animal Behavior Workshop

Both
 Graduate
 Undergraduate

\$ 30 /semester Effective Date of Change: Spring 2022
 Proposed Fee (this field you may enter other option just by typing it in box)

Fee Context

Number of existing class fees within the same department: 15
 Associated Program Fee: \$ 75.00 /semester
 Associated Differential Tuition: \$ _____ /semester

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The course will provide the opportunity for applying the principles from the discipline of applied animal behavior to a variety of real-world captive settings (e.g., companion, farm, zoo, laboratory) through illustrative case studies, observation, and literature research. This fee is to cover the cost of field trips that meet learning outcomes for this course. Destinations provide learning experiences not available in the classroom. This class allows for extended opportunities to practice specific one-on-one skills with individual case study animals. This workshop further builds on experiences observed and practiced in ACBS 482/484.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

Fees will pay for motor-pool for one 15 passenger van and associated mileage costs. Collected fees will allow for up to 4 field trips to locations within Southern Arizona. Proposed locations include Valley Humane Society in Casa Grande, Phoenix Animal Behavior Center in Scottsdale and Arizona Animal Welfare League in Phoenix. Mileage justification and breakdown of cost attached.

There is no overlap of materials between other fees the student might pay and this course fee. Additionally, course fees are subject to the Expenditure Based Administrative Service charge of 1% which is assessed on all expenditures. These monies are used to support overhead costs and administrative services the university provides but are not easily assignable to any one unit. This class is typically offered only in the Spring, the proposed revenue and expenditures below are term figures.

Proposed Annual Revenue

Class Fee Amount	\$	\$ 30.00
Number of Students	#	14
Total Revenue	=	\$ 420.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 4.18
Motorpool rental fee x 4	\$	\$ 276.44
Mileage for Field-trips (746 miles)	\$	\$ 141.74
	\$	
Total Program Costs	=	\$ 422.36

Arizona Animal Welfare League

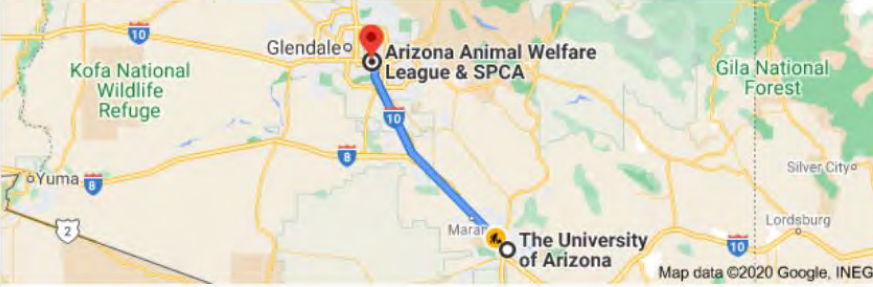
The University of Arizona Tucson, AZ

Arizona Animal Welfare League & SPCA, 25 N 40th St, Phoenix, AZ 85034

Closed today

1 hr 42 min (110.0 mi) via I-10 W

DIRECTIONS

A Google Maps interface showing a route from The University of Arizona in Tucson to the Arizona Animal Welfare League & SPCA in Phoenix. The route is highlighted in blue and follows I-10 West. The map includes labels for Glendale, Marana, and various landmarks like Kofa National Wildlife Refuge and Gila National Forest. A red dot marks the destination, and a yellow dot marks the starting point. The text 'Closed today' is displayed in red above the map. Below the map, the travel time and distance are shown as '1 hr 42 min (110.0 mi) via I-10 W'. A blue 'DIRECTIONS' button is located at the bottom right.

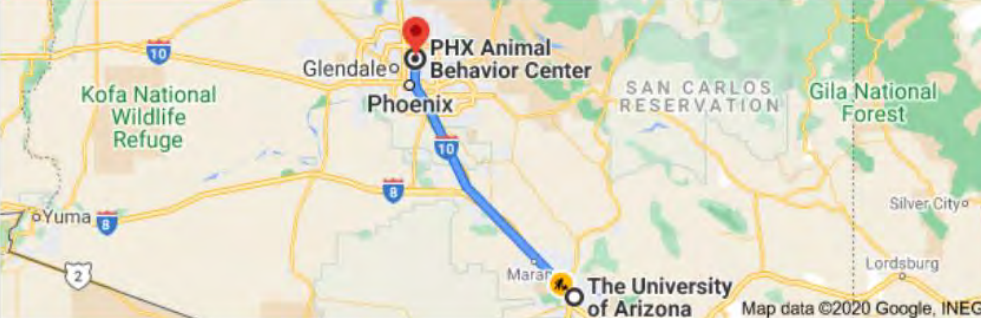
Phoenix Animal Behavior Center

The University of Arizona Tucson, AZ


PHX Animal Behavior Center, 12235 N Cave Creek Rd #13, Phoenix, AZ 850


1 hr 54 min (124.6 mi) via I-10 W

DIRECTIONS


A Google Maps interface showing a route from The University of Arizona in Tucson to the PHX Animal Behavior Center in Phoenix. The route is highlighted in blue and follows I-10 West. The map includes labels for Glendale, Phoenix, Marana, and various landmarks like Kofa National Wildlife Refuge, San Carlos Reservation, and Gila National Forest. A red dot marks the destination, and a yellow dot marks the starting point. Below the map, the travel time and distance are shown as '1 hr 54 min (124.6 mi) via I-10 W'. A blue 'DIRECTIONS' button is located at the bottom right.





Valley Humane Society

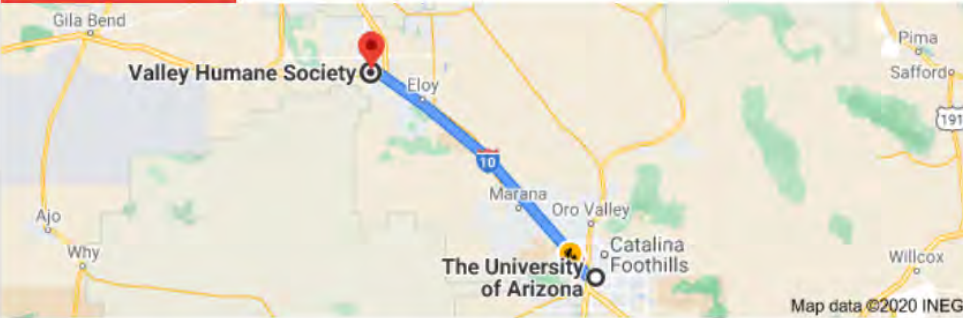
 The University of Arizona Tucson, AZ

 Valley Humane Society, 15699 W Aniceto Rd, Casa Grande, AZ 85193


Closed today

 Hours or services may differ



1 hr 2 min (64.8 mi) via I-10 W

 DIRECTIONS

Course Catalog Number: ACBS 497

Total Cost per Student **29.87**

Enrollment per Semester 14

Field Trip

A	B	C	D	E	F
Item	Cost per Item	Quantity Needed per Semester	# Days	Total Cost	Cost per Student per Semester
Passenger Van (HOV)	69.11	4	1	276.44	19.75
Mileage	0.19	746	1	141.74	10.12
Field Trip Cost Per Student					29.87

Mileage:	Mileage to Destination	Mileage per Round Trip	# Round Trips	Total Mileage for each Destination
UA Motorpool to Valley Humane Society	67	134	2	268
UA Motorpool to Phoenix Animal Behavior Center	127	254	1	254
UA Motorpool to Arizona Animal Welfare League	112	224	1	224
Total Mileage				746

Total Fee Requested **30**

University: University of Arizona College/School: College of Ag. & Life Sciences
 Class Number: ACBS 315L Department: Animal & Biomedical Sciences
 Class Title: Physiology of Reproduction Laboratory
 Both Graduate Undergraduate

Fee Amount:
 \$ 20 /semester \$ 90 /semester Effective Date of Change: Fall 2021
 Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Class Fee History:
 Date Established Fall 2009 and original amount \$ 20
 Most Recent Date and Change to fee (Date/Amount) Fall 2009

Other Applicable Fees in College/School
 Number of existing class fees in the same department: 15
 Associated Program Fees: \$ 75.00 /semester
 Associated Differential Tuition: _____ /semester

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

Fees will cover expenses experienced for hands on training (100% engagement) in techniques involved in domestic animal reproductive physiology. Students learn various topics related to reproductive physiology in livestock. These topics include anatomy, endocrinology, gametes, embryos, semen evaluation, artificial insemination, ultrasound, and synchronization of the estrous cycle. The objective is to introduce students to reproductive anatomy and real-world applications of reproductive technologies.

There is no overlap of materials between other fees the student might pay and this course fee. Additionally, course fees are subject to the Expenditure Based Administrative Service charge of 1% which is assessed on all expenditures. These monies are used to support overhead costs and administrative services the university provides but are not easily assignable to any one unit.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

We purchase 12 reproductive tracts for the three anatomy labs. We have included the cost for semen collection and freezing from sheep and cattle. Expenses for synchronization of the estrous cycle include industry standard materials for 20 ewes, which is designed as a final project to teach students how to manipulate the female cycle for artificial insemination. There are two laboratories where students learn artificial insemination in cattle and then palpate animals to determine pregnancy rates.

The course fee approved in 2009 did not include animal expenses and the course was recently reorganized and updated to provide the students with real hands on instruction with animals. We also added a laboratory on hormone measurements (ELISA Practice Assays). This lab teaches the students how hormones are measured in the laboratory setting. These two additional expenses explain 80% of the \$70 increase. The remaining 20% increase is due to price increases in supplies.

This class is typically offered only in the Fall, the proposed revenue and expenditures below are term figures.

Proposed Annual Revenue

Class Fee Amount	\$	\$ 90.00
Number of Students	#	20
Total Revenue	=	\$ 1,800.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 18.00
Reproductive Tracts/Semen Collection/Synchr	\$	\$ 420.00
Hormone Measurements (ELISAs)	\$	\$ 530.00
Sheep (20) & Cattle (25) Usage	\$	\$ 850.00
Total Program Costs	=	\$ 1,818.00

University: University of Arizona College/School: College of Engineer
 Class Number: MSE 222 Department: Materials Science & Engineering
 Class Title: Introduction to Materials Science and Engineering I

Both Graduate Undergraduate

\$ 50 /semester Effective Date of Change: Fall 2022
 Proposed Fee (this field you may enter other option just by typing it in box)

Fee Context

Number of existing class fees within the same department: 10
 Associated Program Fee: \$ 0.00 /semester
 Associated Differential Tuition: \$ 450.00 /semester

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The fee will allow a partial offset of annual software licensing fees paid by the MSE department that are required to provide student access to the ANSYS Granta Edupack materials selection software package. The package is applied across multiple courses within the MSE curriculum and supports design-driven activities as part of a core introductory course (MSE 222) and an established elective dealing with materials selection principles and their environmental ramifications (MSE 450/550). In the latter case, the software package is integrated with the required course text (Ashby: Materials and the Environment) and the formal material selection framework used throughout the course. The software offers the students a means to address topic-critical concepts developed through lectures and readings while exploring the inter-related ramifications of material properties, performance and environmental load impact using real-world materials and data sets.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The software has been used without cost to students for approximately 10 years, however, departmental budgetary restrictions coupled with licensing cost increases (over 80% in the past year) require the establishment of a fee moving forward to partially offset costs for this teaching tool, which original price is \$6000. The total cost of software that will be cover by the MSE course fees is \$3500 (i.e. \$1500 estimated for MSE 450-550 + \$2000 estimated for MSE 222). Here is a link to information about Granta Edupack software and resources that will be made available to students: <https://grantadesign.com/education/ces-edupack/what-is-edupack/>

There is no overlap of materials between other fees the student might pay and this course fee. Additionally, course fees are subject to the Expenditure Based Administrative Service charge of 1% which is assessed on all expenditures. These monies are used to support overhead costs and administrative services the university provides but are not easily assignable to any one unit. This class is typically offered only in the Spring, the proposed revenue and expenditures below are term figures.

Proposed Annual Revenue

Class Fee Amount	\$	\$ 50.00
Number of Students	#	40
Total Revenue	=	\$ 2,000.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 20.00
Annual ANSYS Granta Edupack software licens	\$	\$ 2,000.00
	\$	
	\$	
Total Program Costs	=	\$ 2,020.00

CLASS FEE REQUEST - NEW

University: University of Arizona College/School: College of Engineering
 Class Number: MSE 450/550 Department: Materials Science & Engineering
 Class Title: Materials Selection for the Environment

Both
 Graduate
 Undergraduate

\$ 50 /semester
 Proposed Fee

Effective Date of Change: **Fall 2022**
(this field you may enter other option just by typing it in box)

Fee Context

Number of existing class fees within the same department: 10

Associated Program Fee: \$ 0.00 /semester

Associated Differential Tuition: \$ 900.00 /semester

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The listed \$900 differential tuition is paid only by upper division undergraduate students. Students enrolled in the co-convened 550 will not pay the program fee.

The fee will allow a partial offset of annual software licensing fees paid by the MSE department that are required to provide student access to the ANSYS Granta Edupack materials selection software package. The package is applied across multiple courses within the MSE curriculum and supports design-driven activities as part of a core introductory course (MSE 222) and an established elective dealing with materials selection principles and their environmental ramifications (MSE 450/550). In the latter case, the software package is integrated with the required course text (Ashby: Materials and the Environment) and the formal material selection framework used throughout the course. The software offers the students a means to address topic-critical concepts developed through lectures and readings while exploring the inter-related ramifications of material properties, performance and environmental load impact using real-world materials and data sets.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The software has been used without cost to students for approximately 10 years, however, departmental budgetary restrictions coupled with licensing cost increases (over 80% in the past year) require the establishment of a fee moving forward to partially offset costs for this teaching tool, which original price is \$6000. The total cost of software that will be cover by the MSE course fees is \$3500 (i.e. \$1500 estimated for MSE 450-550 + \$2000 estimated for MSE 222). Here is a link to information about Granta Edupack software and resources that will be made available to students: <https://grantadesign.com/education/ces-edupack/what-is-edupack/>.

There is no overlap of materials between other fees the student might pay and this course fee. Additionally, course fees are subject to the Expenditure Based Administrative Service charge of 1% which is assessed on all expenditures. These monies are used to support overhead costs and administrative services the university provides but are not easily assignable to any one unit. This class is typically offered only in the Spring, the proposed revenue and expenditures below are term figures.

Proposed Annual Revenue

Class Fee Amount	\$	\$ 50.00
Number of Students	#	30
Total Revenue	=	\$ 1,500.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 15.00
Annual ANSYS Granta Edupack software licens	\$	\$ 1,500.00
	\$	
	\$	
Total Program Costs	=	\$ 1,515.00

University: University of Arizona College/School: College of Engineering
 Class Number: AME 487/587 Department: Aerospace and Mechanical Engineering
 Class Title: Design of Mechatronic Systems
 Both Graduate Undergraduate

Fee Amount:
 \$ 50 /semester \$ 100 /semester Effective Date of Change: Spring 2022
 Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Class Fee History:
 Date Established Spring 2014 and original amount \$ 50
 Most Recent Date and Change to fee (Date/Amount) Spring 2014

Other Applicable Fees in College/School
 Number of existing class fees in the same department: 20
 Associated Program Fees: \$ 0.00 /semester
 Associated Differential Tuition: \$ 900.00 /semester

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The listed \$900 differential tuition is paid only by upper division undergraduate students. Students enrolled in the co-convened 587 will not pay the program fee. Also, the differential tuition funds have historically been used 100% for TAs, graders, and adjunct instructors.

AME's older computers had dedicated ports for data transfer, but computers now utilize USB only. The increase to the existing fee will provide funding for the necessary technology upgrades to the mechatronic kit currently comprised of bread board, micro-controllers, LCD display, resistors, capacitors, and various sensors (humidity, temperature, light) issued to each student in the class to fulfill the class requirements.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The increase in the fee from \$50 to \$100 will fully cover the additional expenses associated with the technology upgrades which include new items: USB RS232 cable (\$19.00 ea), PikKit 3 programmer (\$24.00 ea), Jumper Wire Kits (\$12.00 ea), (List attached).

There is no overlap of materials between other fees the student might pay and this course fee. Additionally, course fees are subject to the Expenditure Based Administrative Service charge of 1% which is assessed on all expenditures. These monies are used to support overhead costs and administrative services the university provides but are not easily assignable to any one unit. This class is typically offered only in the Spring, the proposed revenue and expenditures below are term figures.

Proposed Annual Revenue

Class Fee Amount	\$	\$ 100.00
Number of Students	#	25
Total Revenue	=	\$ 2,500.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 25.00
Consumables (attached)	\$	\$ 2,500.00
	\$	
	\$	
Total Program Costs	=	\$ 2,525.00

Expendable Materials Cost Breakdown

Course Catalog Number: AME 487/587

A	B	C	D	E	F
Item (Please list each item separately)	Cost per Item per Semester	Total Quantity Needed per Semester	B X C = Total Cost	Enrollment per Semester	D ÷ E = Total Cost per Student per Semester
Breadboard	21	25	525	25	21.00
Microcontrollers	5	25	125	25	5.00
LCD display	12	25	300	25	12.00
Potentiometers	1	25	25	25	1.00
Capacitors, resistors	0.5	250	125	25	5.00
Volt Regulator	0.5	50	25	25	1.00
USB RS232 cable	19	25	475	25	19.00
PikKit 3 programmer	24	25	600	25	24.00
Jumper Wire Kit	12	25	300	25	12.00
Total Cost per Student					100.00

Total Fee Requested per Student: 100

Instructions for Spreadsheet:

- A - List separately each item to be purchased with the requested fee.
- B - Enter the cost to purchase each item.
- C - Enter the total number of items needed per semester. If one item can be used more than one semester, show the fraction that represents the portion of the item used each semester.
- D - The formula entered in each cell will multiply the cost of the item by the total quantity needed each semester.
- E - List the number of students enrolled in the course each semester.
- F - The formula entered in each cell will divide the total cost of the item by the number of students enrolled each semester.

University: University of Arizona College/School: College of Science
 Class Number: SLHS 261 Department: Speech, Language, and Hearing Science
 Class Title: Anatomy and Physiology of the Speech Mechanism
 Both Graduate Undergraduate

Fee Amount:
 \$ 25 /semester \$ 25 /semester Effective Date of Change: Fall 2021
 Current Rate Proposed Rate (this field you may enter other option just by typing it in box)

Class Fee History:
 Date Established Fall 2009 and original amount \$ 25
 Most Recent Date and Change to fee (Date/Amount) Fall 2009

Other Applicable Fees in College/School
 Number of existing class fees in the same department: 6
 Associated Program Fees: \$ 0.00 /semester
 Associated Differential Tuition: \$ 0.00 /semester

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

SLHS 261 Anatomy and Physiology of the Speech Mechanism is a 4-credit course that has included a lecture and laboratory components. The course currently has a course fee of \$25.00 associated with the laboratory section. This fee has provided support for cadaver activities, anatomical models, and anatomical software. As the course evolved with new instructors, the activities in the laboratory component more closely match the definition of a discussion based on the course catalog (copied verbatim: "Interactive meeting typically serving as a secondary component that can include activities such as demonstrations, hands-on engagements, case studies, field experiences." For that reason, we modified the course components to include a lecture and discussion section Fall 2020 and requested a fee waiver for this semester only. With this change in component, the need for fee remains but its purpose has changed. Therefore, we would like to change the association of the fee from the laboratory component to the discussion component.
 The discussion section expands upon course lectures by focusing on instrumentation and methodology used in research and clinical settings to assess the structure and function of the speech mechanism in both normal and disordered populations. To support student learning, physical anatomical models of the head and neck help students visualize structures and examine function. In addition, computer software that allows for 360 viewing of the anatomy along with self-paced quizzing and case studies support application. There are also consumable supplies (gloves, tongue depressors, face masks, flashlights) that allow the students to complete oral mechanism exams on their peers to identify and examine function of structures on the face and in the oral cavity.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The course fees will be used to purchase and replace anatomical models for student use. Based on the anticipated class size, having 4 identical models of a given structure (e.g., larynx) will facilitate small groups of students didactic interaction and problem-solving with the models. Models range in price from \$350 to \$1000 each, we are looking into buying a \$600 model. We have a set of models currently, but need to increase the number of models to allow for small group activities as well as replenish based on wear and tear.
 Software to support anatomical learning allows students to interact with the visual images, rotate structures, complete self-paced quizzing and review as well as support clinical problem-solving. Such software is available as a department subscription which allows students enrolled in the class access. The department subscription is important as it allows the instructor to use the same images in lectures that students are interacting with during the discussion. The consumable supplies allow students to work in pairs to complete oral mechanism exams, with the hands-on experience being valuable to their learning, such as but not limited to; flashlights with batteries, gloves, tongue depressors).
 There is no overlap of materials between other fees the student might pay and this course fee. Additionally, course fees are subject to the Expenditure Based Administrative Service charge of 1% which is assessed on all expenditures. These monies are used to support overhead costs and administrative services the university provides but are not easily assignable to any one unit. This class is typically offered in the Spring, the proposed revenue and expenditures below are term figures.

Proposed Annual Revenue

Class Fee Amount	\$	\$ 25.00
Number of Students	#	70
Total Revenue	=	\$ 1,750.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 26.22
Consumables	\$	\$ 239.00
Anatomical models of head and neck	\$	\$ 1,800.00
Anatomical software	\$	\$ 583.00
Total Program Costs	=	\$ 2,648.22

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University: University of Arizona College/School: College of Science
 Class Number: GEOS 477/577 Department: Geosciences
 Class Title: Active Tectonics

Both Graduate Undergraduate

\$ 189 /semester Effective Date of Change: Spring 2022
 Proposed Fee (this field you may enter other option just by typing it in box)

Fee Context

Number of existing class fees within the same department: 26

Associated Program Fee: \$ 150.00 /semester

Associated Differential Tuition: \$ _____ /semester

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

See Attached.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

Costs for this course have been kept at an absolute minimum, in order to make it affordable to all students, in accordance with ABOR policy. All costs have been carefully reviewed and are in accordance with the U of A policy on Special Class Fees 1.01, 1.02, 2.01, 3.01, 3.02, 4.01, 5.01, 6.01, 6.02, and 7.01. These fees cover travel/transportation costs, lodging (camping) fees, along with expendables such as camping supplies (ice, firewood, camp stove propane, garbage bags) and field supplies (guide books). The field trip supported by this fee is an essential component to the curriculum of GEOS 477/577, providing students with an irreplaceable first-hand experience in concepts, methods of observation, and interpretation of active geologic structures that they will require in their future careers as geoscientists. Details on consumables and mileage cost attached.

There is no overlap of materials between other fees the student might pay and this course fee. Additionally, course fees are subject to the Expenditure Based Administrative Service charge of 1% which is assessed on all expenditures. These monies are used to support overhead costs and administrative services the university provides but are not easily assignable to any one unit. This class is typically offered only in the Spring, the proposed revenue and expenditures below are term figures.

Proposed Annual Revenue

Class Fee Amount	\$	\$ 189.00
Number of Students	#	22
Total Revenue	=	\$ 4,158.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 41.63
Consumables	\$	\$ 1,381.00
Field Trip	\$	\$ 2,782.00
	\$	
Total Program Costs	=	\$ 4,204.63

GEOS 477/577 - Purpose

The listed \$150 program fee is paid only by upper division undergraduate students. Students enrolled in the co-convened 577 will not pay the program fee.

This course, Active Tectonics, is focused on providing upper level undergraduate and graduate students with the conceptual understanding and practical skills necessary to identify, characterize and properly interpret the geometry, slip rates, and earthquake hazards associated with active geologic structures. To do so in a robust manner, a field trip is necessary so that students can gain first-hand experience observing and measuring these structures in the field. In past years, a field trip had been an important component of this course, but due to a change in teaching personnel, the field component was dropped. However, because new faculty with the ability to lead the field component have joined in the teaching rotation, the ability to re-integrate this essential component into the course is once again possible.

In the field, we visit world-class examples of active normal faults (in Death Valley), strike-slip faults (the San Andreas Fault at multiple locations) and thrust faults (Ventura and the Western Transverse Ranges). In each case, students make observations and measurements of the features that constrain the geometry of the structures, and those which permit measurement of the slip rates on the associated faults. At other stops, we visit outcrops that permit a hands-on inspection of the detailed internal structure of fault zones; we ask students to document these features and we discuss the implications in terms of the physics of the earthquake process. We also visit recently ruptured fault scarps at Ridgecrest and Owens Valley to discuss paleoseismological characterization. We then place all of these location-specific insights into the broader context of the evolution of western North America. This trip is greatly appealing to students wishing to learn how to practically apply their geoscience knowledge to better understand active geologic structures and the hazards they pose to society.

A pilot field trip for this course was run in Fall 2019 using departmental support; however, our department does not have the resources to sustain this field trip annually without the requested course fee. We worked extensively with the University DRC office to ensure that the field trip experience and activities are accessible to all participants in the course.

We request a course fee of \$189 to be applied to this course, GEOS 477/577; the breakdown of the estimated expenditures is in the attached materials. The costs determined in the attached materials reflect the costs incurred on our pilot field trip; therefore, they reflect as best as we are able estimate the true costs of the trip, with only modest modification of the addition of one day to the itinerary to accommodate some tight scheduling we experienced during the first offering. We have moved the course to the Spring semester to permit running the field trip during spring break; this allows us to extend the field trip by one day, helping alleviate the tight schedule on one of the days and permit more time for collection of field data (this new itinerary is reflected in the attached maps and documentation). The cost of that additional day is modest and is only associated with an additional day of rental for the vehicles and food. All these costs reflect one-time costs (campsite fees, vehicle rentals) and consumable items (food, camp stove propane, cleaning supplies, printing of field guides). It is necessary that the vans are not filled to the maximum per-person capacity, because we require a significant amount of cargo room to also transport camping gear (tents, sleeping bags, sleeping mats, backpacks, luggage, camp stoves, water supplies, coolers to transport food and ice, and geologic equipment. The 3 vehicles utilized in this quote will accommodate a maximum of 22 students, along with three instructors/drivers).

Cost Breakdown

Course Catalog Number:

GEOS 477/577

Total Cost per Student **189.22**

Consumables needed for the field trip

Enrollment per Semester

22

A	B	C	D	E
Item (Please list each item separately)	Cost per Item per Semester	Total Quantity Needed per Semester	B X C = Cost per Semester	D ÷ Enrollment = Total Cost per Student per Semester
Food	35	22	770	35
Firewood	6	5	30	1
Restock Safety Kit	10	1	10	0.45
Grabage bags	6	1	6	0.27
Batteries (for head lamps, lanterns, Walkie Talkies)	10	1	10	0.45
Dishwashing soap	2	1	2	0.09
Printing field area maps	20	2	40	1.82
Box of markers	5	1	5	0.23
Propane	8.5	8	68	3.09
Printing field guides	20	22	440	20.00
			1,381	
Consumables Cost per Student				62.77

Field Trip Cost

A	B	C	D	E	F
Item	Cost per Item	Quantity Needed per Semester	# Days	Total Cost	Cost per Student per Semester
Passenger Van	59.75	1	7	418.25	19.01
Mileage	0.18	1,963	N/A	353.34	16.06
Passenger Van	59.75	1	7	418.25	19.01
Mileage	0.18	1,963	N/A	353.34	16.06
Passenger Van	59.75	1	7	418.25	19.01
Mileage	0.18	1,963	N/A	353.34	16.06
Silverwood SRA (camp site)	53	3	1	159.00	7.23
Carrizo Plain NM (camp site) FREE	0	3	1	0.00	0.00
Carpinteria SB group site (camp site)	188	1	1	188.00	8.55
Alabama Hill BLM (camp site) FREE	0	1	1	0.00	0.00
Death Valley group site (camp site)	60	1	2	120.00	5.45
				2,782.00	
Field Trip Cost Per Student					126

Mileage: Per vehicle	Mileage to Destination	Mileage per Round Trip	# Round Trips	Total Mileage for each Destination
UA to Punchbowl Fault Cajon Pass	448	448	1	448
Punchbowl Fault Cajon Pass to SAF Cajon Pass	5.8	5.8	1	6
SAF Cajon Pass to Night 1 campsite	15.4	15.4	1	15
Night 1 Campsite to Appletree Flats SAF Outcrop	30.5	30.5	1	31
Appletree Flats SAF to Devils Punchbowl Co Park	19	19	1	19
Devils Punchbowl Co Park to Stop 2C-SAF Palmdale	23.1	23.1	1	23
Stop 2C-SAF Palmdale to 43851 Lake Hughes Rd, Lake Hughes CA	21.71	21.71	1	22
43851 Lake Hughes Rd, Lake Hughes CA to Stop 2D-Wheeler Ridge	53.7	53.7	1	54
Stop 2D-Wheeler Ridge to KCL Camp Ground	55.3	55.3	1	55
KCL Camp Ground to Dragons Back Viewpoint	3.6	3.6	1	4
Dragons Back Viewpoint to Wallace Creek Interpretive Trail	21.3	21.3	1	21
Wallace Creek Interpretive Trail to KCL Camp Ground	18.4	18.4	1	18
KCL Camp Ground to 11960 N Ventura Ave, Ojai, CA	82.6	82.6	1	83
11960 N Ventura Ave, Ojai, CA to Stop 3A Ventura Scarp	19.7	19.7	1	20
Stop 3A Ventura Scarp to The Cross	5	5	1	5
The Cross to Stop 3A-Ventura Scarp	1/8/2021 5	5	1	5

Stop 3A-Ventura Scarp to Pitas Point Marine Terraces	12.8	12.8	1	13
Pitas Point Marine Terraces to Arroyo Burro Beach County Park	28.1	28.1	1	28
Arroyo Burro Beach County Park to Arroyo Burro Beach stop 2	0.06	0.06	1	0
Arroyo Burro Beach stop 2 to Loon Point Beach Parking	11.6	11.6	1	12
Loon Point Beach Parking to Carpinteria Stat Beach Campground	5.4	5.4	1	5
Carpinteria Stat Beach Campground to Ridgecrest Fault Scarp	198	198	1	198
Ridgecrest Fault Scarp to Lone Pine	80.2	80.2	1	80
Lone Pine to Movie Rd, Lone Pine CA	3.3	3.3	1	3
Movie Rd, Lone Pine CA to Alabama Hills, CA	2.3	2.3	1	2
Alabama Hills, CA to Father Crowley Overlook	44.4	44.4	1	44
Father Crowley Overlook to Mosaic Canyon Trail	40.5	40.5	1	41
Mosaic Canyon Trail to Furnace Creek Campground	26.8	26.8	1	27
Furnace Creek Campground to Dante's View	25.9	25.9	1	26
Dante's View to Furnace Creek Wash	16.1	16.1	1	16
Furnace Creek Wash to Furnace Creek Fault Viewpoint	4.8	4.8	1	5
Furnace Creek Fault Viewpoint to Badwater Basin Viewpoint	25.5	25.5	1	26
Badwater Basin Viewpoint to Shoreline Butte Viewpoint	27.3	27.3	1	27
Shoreline Butte Viewpoint to Mormon Point Turtleback	10.9	10.9	1	11
Mormon Point Turtleback to Copper Canyon Detachment	5.71	5.71	1	6
Copper Canyon Detachment to Natural Bridge Trail	15.7	15.7	1	16
Natural Bridge Trail to Artists Drive Fault	8.4	8.4	1	8
Artists Drive Fault to Furnace Creek Campground	13	13	1	13
Furnace Creek Campground to UA	528	528	1	528
	0	0	1	0
	0	0	1	0
Total Mileage (for each van)				1,963

GEOS477/577 Field Trip Days 1-5

Day 1

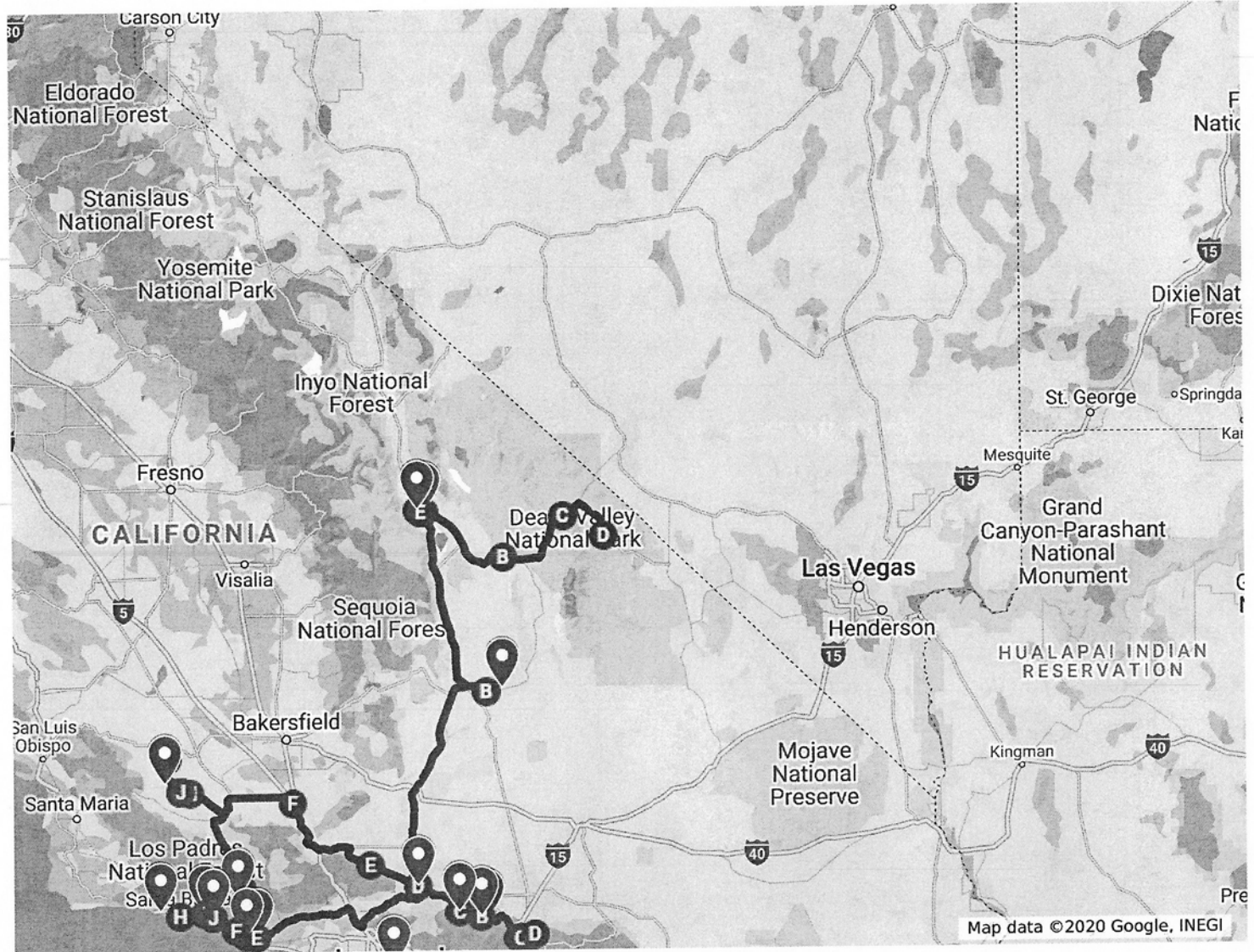
- 📍 1040 E 4th St
- 📍 Punchbowl fault Cajon Pass
- 📍 SAF Cajon Pass – park here
- 📍 Night 1 Campsite

Day 1 Driving Directions

- 📍 **A** 1040 E 4th St
- 📍 **B** Punchbowl fault Cajon Pass
- 📍 **C** SAF Cajon Pass – park here
- 📍 **D** Night 1 Campsite


Day 2

- 📍 Day 2.0. Wrightwood Paleoseismic site
- 📍 Stop 2A–Appletree flats SAF outcrop
- 📍 Stop 2B–Devil’s Punchbowl Co Park
- 📍 Stop 2C–SAF Palmdale
- 📍 Stop 2D–Wheeler Ridge
- 📍 KCL Camp Ground
- 📍 Dragons Back Viewpoint
- 📍



Map data ©2020 Google, INEGI

Wallace Creek Interpretive
Trail

 Selby Ranch Cow Camp









Day 2 Driving Directions

- A** Night 1 Campsite
- B** Appletree flats SAF outcrop
- C** Devils Punchbowl Co Park
- D** Stop 2C–SAF Palmdale
- E**

43851 Lake Hughes Rd, Lake
Hughes, CA 93532, USA

- F** Stop 2D–Wheeler Ridge
 - G** KCL Camp Ground
 - H** Dragons Back Viewpoint
 - I**
- Wallace Creek Interpretive
Trail
- J** KCL Camp Ground
-

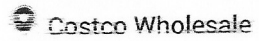
Day 3

-  Griffith Observatory
-  Ojai (Optional)
-  Santa Ynez Fault (optional)
-  Stop 3A–Ventura Scarp
-  The Cross
-  Pitas Point Marine Terraces
-  Loon Point Beach Parking
- 

Arroyo Burro Beach County
Park



Carpinteria State Beach
Campground



Day 3 Driving Directions

A KCL Camp Ground

B

11960 N Ventura Ave, Ojai, CA
93023, USA

C Stop 3A–Ventura Scarp

D The Cross

E Stop 3A–Ventura Scarp

F Pitas Point Marine Terraces

G

Arroyo Burro Beach County
Park

H Arroyo Burro Beach Stop 2

I Loon Point Beach Parking

J

Carpinteria State Beach
Campground

Day 4



Carpinteria State Beach
Campground



Ridgecrest Fault Scarp



Lone Pine



The Mobius Arch Loop
Trailhead

Directions from Carpinteria State
Beach Campground to Alabama
Hills, California, USA

A

Carpinteria State Beach
Campground

B

Ridgecrest Fault Scarp

C

Lone Pine

D

Movie Rd, Lone Pine, CA
93545, USA

E

Alabama Hills, California, USA

Day 5



Father Crowley Overlook



Mosaic Canyon Trail



Furnace Creek Campground

Directions from Alabama Hills,
California, USA to Furnace Creek
Campground

A

Alabama Hills, California, USA

B

Father Crowley Overlook

C

Mosaic Canyon Trail

D

Furnace Creek Campground

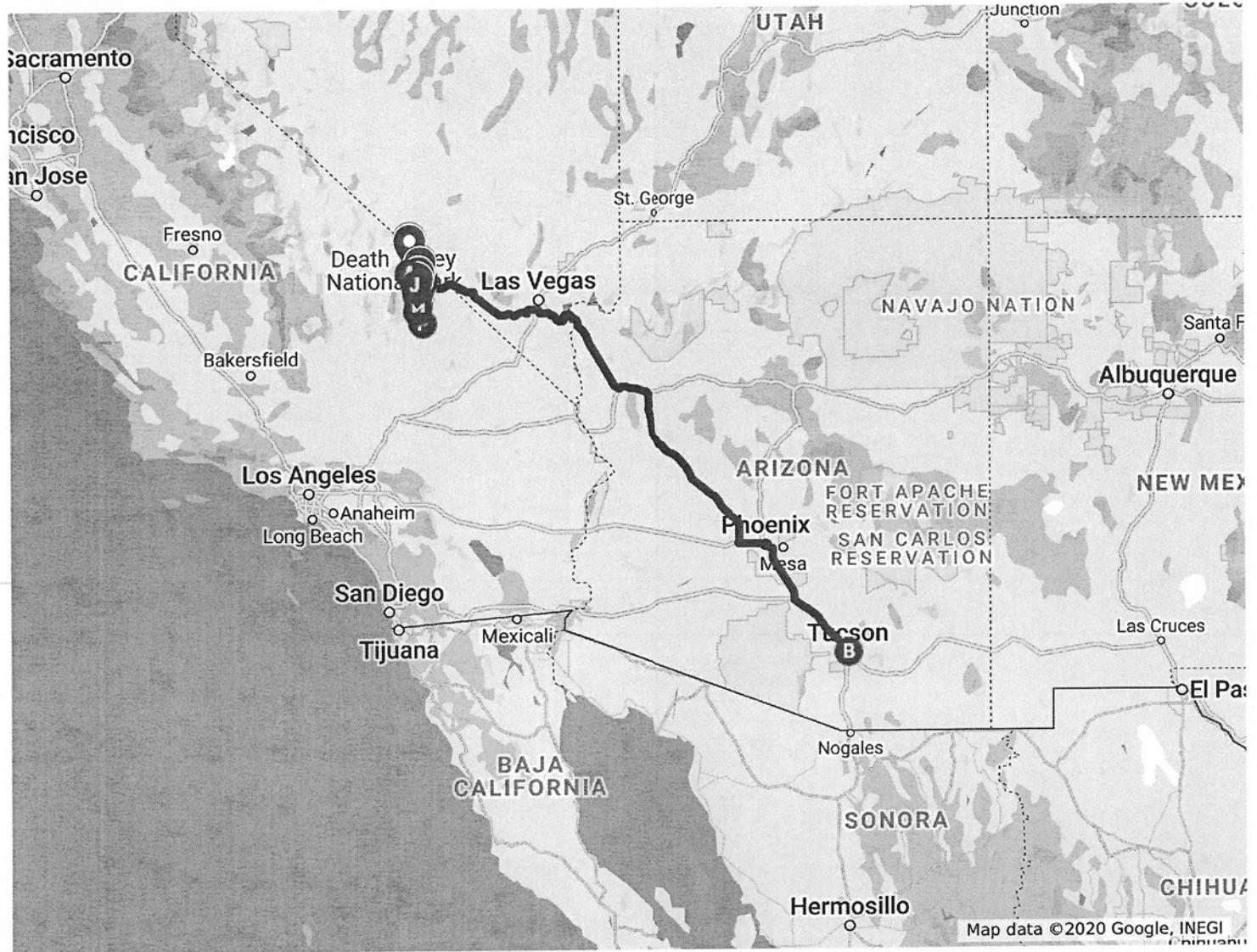
GEOS477/577 Field Trip Day 6-7

Day 6

- 📍 Furnace Creek Campground
- 📍 Dante's View
- 📍 Split Cinder Cone
- 📍 Furnace Creek Wash
- 📍
- Furnace Creek Fault Viewpoint
- 📍 Badwater Basin Viewpoint
- 📍 Shoreline Butte Viewpoint
- 📍 Copper Canyon Detachment
- 📍 Mormon Point Turtleback
- 📍 Natural Bridge Trail
- 📍 Artists Drive Fault

Day 6 Driving Directions

- A** Furnace Creek Campground
- B** Dante's View
- C** Furnace Creek Wash
- D**
- Furnace Creek Fault Viewpoint
- E** Badwater Basin Viewpoint
- F** Shoreline Butte Viewpoint
- G** Mormon Point Turtleback
- H** Copper Canyon Detachment
- I** Natural Bridge Trail
- J** Artists Drive Fault



Day 7 Driving Directions

A Furnace Creek Campground

B
1040 East 4th Street, Tucson,
AZ, USA

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University: University of Arizona College/School: Social & Behavioral Sciences
 Class Number: HIST 328 Department: History
 Class Title: Cuisine, Culture and Power

Both Graduate Undergraduate

\$ 40 /semester Effective Date of Change: Spring 2022
 Proposed Fee (this field you may enter other option just by typing it in box)

Fee Context

Number of existing class fees within the same department: 0

Associated Program Fee: \$ 0.00 /semester

Associated Differential Tuition: \$ 0.00 /semester

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The purpose of the fee is to provide finance to purchase materials, rent space, and provide additional staffing as necessary for two key elements of the course, namely the preparation and cooking of a "local" meal, and the preparation and cooking of a "global" meal. In this course, students are divided into groups, and work together to learn about the origins of a particular plant that is a center of a regional paleolithic cuisine (such as cassava in Amazonia, or sorghum in West Africa). They have to design two meals using this food. The first meal is a local meal and can only involve other companion plants and proteins from the locality (i.e. pineapple in Amazonia, or palm oil in West Africa). The second is a global meal, whereby they take the foodstuff and move it into global cuisine, and develop a meal that uses and blends both foods and techniques from beyond the original locale.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The budget for food for the local meal is \$10/pp and for the global meal is \$15/pp. The remaining funds \$25/pp will cover the rental of kitchen space on campus, and the hiring of specialized support staff who work in kitchens, to ensure health and safety laws are followed precisely, and the rental of UA vehicles for one site visit to local food preparation venues. All of the costs will be covered by the incremental revenue. All activities are germane to the specific goals of the course.

Course fees are subject to the Expenditure Based Administrative Service charge of 1% which is assessed on all expenditures. These monies are used to support overhead costs and administrative services the university provides but are not easily assignable to any one unit. This class is typically offered only in the Spring, the proposed revenue and expenditures below are term figures.

Proposed Annual Revenue

Class Fee Amount	\$	\$ 40.00
Number of Students	#	25
Total Revenue	=	\$ 1,000.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 10.00
Food for lab sessions (x2)	\$	\$ 625.00
Vehicle Rental (motor pool)	\$	\$ 264.00
Rental for instructional kitchen	\$	\$ 120.00
Total Program Costs	=	\$ 1,019.00



CLASS FEE REQUEST - NEW

University: University of Arizona College/School: College of Fine Arts
 Class Number: ART 200 Department: School of Art
 Class Title: The Elements of Drawing

Both
 Graduate
 Undergraduate

\$ 75 /semester
 Proposed Fee

Effective Date of Change: Fall 2021
 (this field you may enter other option just by typing it in box)

Fee Context

Number of existing class fees within the same department: 122

Associated Program Fee: \$ 0.00 /semester

Associated Differential Tuition: \$ 300.00 /semester

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The program fee revenue is use mainly for instructional support/ personnel and other portion for equipment, consumables are very dependent on course fees.

The 2D division in the School of Art offers multiple levels of figure drawing (200- thru 500-level courses). Each figure drawing class draws from the nude model. Beginning- and intermediate-level classes require models with a varied range of body types, while advanced-level classes require models that can hold difficult and extended poses.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

In order to hire and retain the most experienced and professional models, it is necessary that the model pay rate be competitive with those of the surrounding institutions in Tucson. Currently, Pima Community College and the Art Institute of Tucson both pay \$15.00 an hour; Southwest University of Visual Art pays \$13.50 an hour. It has proven difficult to attract and retain a pool of exceptional models at the University of Arizona though the current model rate is \$15.00 an hour. As a research university, it is imperative that the models be of high quality – to ensure such models, a competitive pay rate is required.

In addition to model pay, the course fee also covers a wide range of materials essential for this particular drawing course, along with expendable materials for general instruction. These materials include hand soap, paper towels, bulbs for spotlights used to light the model, rolls of large kraft paper used for preliminary sketching and other expendable materials.

There is no overlap of materials between other fees the student might pay and this course fee. Additionally, course fees are subject to the Expenditure Based Administrative Service charge of 1% which is assessed on all expenditures. These monies are used to support overhead costs and administrative services the university provides but are not easily assignable to any one unit. This class is typically offered year round, the proposed revenue and expenditures below are term figures.

Proposed Annual Revenue

Class Fee Amount	\$	\$ 75.00
Number of Students	#	36
Total Revenue	=	\$ 2,700.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 94.00
Model wages + ERE	\$	\$ 1,501.20
Guest speaker (2)	\$	\$ 600.00
Expendable materials	\$	\$ 7,326.66
Total Program Costs	=	\$ 9,521.86



CLASS FEE REQUEST - NEW

University: University of Arizona College/School: Eller College of Management
 Class Number: BNAD 505 Department: Karl Eller Grad Sch of Mgmt (MBA) with DENP
 Class Title: Strategic Innovation

Both
 Graduate
 Undergraduate

\$ 3,000 /semester
 Proposed Fee

Effective Date of Change: Spring 2022
 (this field you may enter other option just by typing it in box)

Fee Context

Number of existing class fees within the same department: 0

Associated Program Fee: \$ 0.00 /unit

Associated Differential Tuition: \$ _____ /semester

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

PMBA students do not incur any other class fee in Distance Education Network Program (DENP) and the program cost mirrors that of Online MBA.

The inaugural cohort of the Professional MBA (PMBA) launched in August 2020. It is 21-month program which resides in DENP. The main campus MBA program provides an immersion Innovation Experience to students in the Executive MBA program and knows it to be of significant benefit to students. It is this immersion experience that is the stimulus for extending the Innovation Experience to the Professional MBA in DENP. Further, the Innovation Experience is solidly aligned with the PMBA emphasis on technology in business.

In the Executive MBA program in main campus, the Innovation Experience is included in the \$77,000 program fee. MBA leadership seeks to establish a Professional MBA course fee for the purpose of generating funds for the expense of the Innovation Experience. PMBA leadership anticipates that the course fee will be optimal for students, as employers may be more likely to reimburse for the course, with documented educational merit. Likewise, it is anticipated that students will be able to obtain financial aid for the Innovation Experience once there is an established course fee. The BNAD 505 course will first be offered in Spring 2022.

The Professional MBA anticipates traveling to Silicon Valley, the destination of the Executive MBA Innovation Experience, in the near term. However, MBA leadership has the latitude to travel to other locations, as other cities may become optimal for an Innovation Experience in the future. MBA leadership anticipates that the well-designed Innovation Experience will serve to further differentiate the Professional MBA from others in the competitive MBA market.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The Innovation Experience entails travel to a domestic city where significant technological innovation is occurring. It will be conducted over four days and three nights, however future funding constraints may dictate a shortened experience of three days and two night. It will encompass company visits, sessions with company leaders, hackathon activities, and simulation exercises guided by local companies or organizations. The course fee will also include hotel accommodations in single occupancy rooms and some group meals. Chartered coach transportation will be provided for travel in the destination city. Airfare is not specifically included in the course fee request. However, MBA leadership expects to consider including airfare should other cost elements be managed to a level that would permit the flight expense.

This course is intended to be an experience at the forefront of the management of innovation. Considering the emerging nature of innovation management and the uncertainty of travel to major metropolitan cities, the course fee may require further modifications as needed by the changing cost of this experience. Below is what we estimate:
 Innovation Experience (Company visits/hackathons, lodging, chartered coach, some meals) 90%
 Innovation Mentors (Faculty/staff airfare, per diem meals; excludes compensation) 5%
 Preparatory Activity/Materials 3%
 Administrative Service Charge 2%

Proposed Annual Revenue

Class Fee Amount	\$	\$ 3,000.00
Number of Students	#	20
Total Revenue	=	\$ 60,000.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 1,200.00
Innovation Experience	\$	\$ 54,000.00
Innovation Mentors	\$	\$ 3,000.00
Preparatory Activity/Materials	\$	\$ 1,800.00
Total Program Costs	=	\$ 60,000.00

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OTHER FEE REQUEST - NEW

University: University of Arizona College/School: N/A
 Department: Office of Sustainability Program: Sustainability Fee
 Both Graduate Undergraduate Both Choose One Option

Fee Amount: \$ 10 /semester Effective Date of Change: Fall 2021
 Proposed Fee (this field you may enter other option just by typing it in box)

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

This student fee supports the development and implementation of large-scale, student-led, campus-based sustainability projects. The revenues generated by the Sustainability Fee will be awarded to proposals based on their potential to advance the University of Arizona’ sustainability and climate goals. Projects may include, but are not limited to, carbon offsets, waste reduction, energy and water efficiency, and social aspects of sustainability (e.g. social justice and equity). Projects will be highly visible and prioritize education of the University of Arizona and Tucson communities, demonstrating the University’s leadership in environmental sustainability. The Sustainability Fee will also provide University of Arizona students opportunities to gain hands on educational and leadership experience leading sustainability projects.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The proposed fee is intended to pay for large scale, student initiated, sustainable projects and fill the gap left by current funding sources for sustainable projects on campus. The only significant funding source is the University of Arizona Green Fund which operates on an annual budget of \$300,000 and is designed to award small grants, averaging less than \$24,000 per grant from fiscal year 2018 – 2021, to research and campus projects. The other possible funding source is the University of Arizona’s Office of the Provost’s Investment Fund, which is highly competitive and does not typically award grants large enough to fund large-scale sustainable projects. The Sustainability Fee would bridge the gap in current funding sources to fund large projects that would accelerate the University of Arizona’s sustainability and climate action and provide environmental sustainability engagement and educational opportunities for students and the surrounding Tucson community.

- Estimated total annual operating expenses is \$109,000* and consists of:
 (1) Approximately \$10,000 for general and administrative costs (including but not limited to office supplies, outreach activities, annual report production, etc.).
 (2) Approximately \$39,000 to compensate four student employees who would serve on the Sustainability Fund Board and also engage in active outreach with the campus and Tucson communities to best inform the allocation of funding based on community needs. Student employees would work up to 20 hours a week for the 35-week academic year. Undergraduate student employees would be compensated at an average rate of \$13/hour and graduate student employees at a rate of \$15. These may rise in later years if the minimum wage rises above one or both of these figures.
 (3) Approximately \$60,000 to compensate one full-time staff member, aligned with the University Career Architecture Program (UCAP), to support the management of student employees and distribution of fee funds and related data collection, analysis, and annual report creation. Compensation is expected to rise in accordance with UCAP.

*See SFS Budget Estimate Explanation file for explanation of budget estimates, attached.

Student Consultation (Please describe the method and outcomes of student consultation)

The Sustainability Fee is proposed by University of Arizona undergraduate students and members of the Associated Student of the University of Arizona (ASUA) student program Students for Sustainability. ASUA and the Graduate & Professional Student Council (GPSC) were consulted and have voiced their support the Fee (see letter of support from ASUA leadership). Other students were consulted via a 2-question survey conducted by Students for Sustainability. The survey was distributed to undergraduate and graduate students via list-serves and garnered 149 responses.

- Of the 149 respondents:
 *95% would definitely or possibly support a sustainability fee ;
 *48% are willing to pay at least \$20 per semester (\$40 per year);
 *75% are willing to pay at least \$10 per semester (\$20 per year).

Proposed Annual Revenue

Other Fee Amount	\$	\$ 20.00
Number of Students	#	45,000
Total Revenue	=	\$ 900,000.00

Proposed Annual Expenditures

General and Administrative Costs	\$	\$ 10,000.00
Student Board Wages & ERE	\$	\$ 39,000.00
Full-time Employee Wages & ERE	\$	\$ 60,000.00
Sustainable Project Awards	\$	\$ 791,000.00
Total Expenditures	=	\$ 900,000.00

BUDGET

Full-Time Project Manager				
Full Time Equivalent	Base Salary	ERE	Total Annual Salary + ERE	Rounded Up to Nearest \$1,000
1	\$45,000	\$14,400.00	\$59,400	\$60,000

Undergraduate Student Board Members							
FTE	Hourly Wage	Annual Wages	ERE	Total Annual Wages + ERE	Number of Student Board Members	Total Undergraduate Student Wages	Rounded Up to Nearest \$1,000
0.5	\$13	\$9,100.00	\$163.80	\$9,263.80	3	\$27,791	\$28,000.00

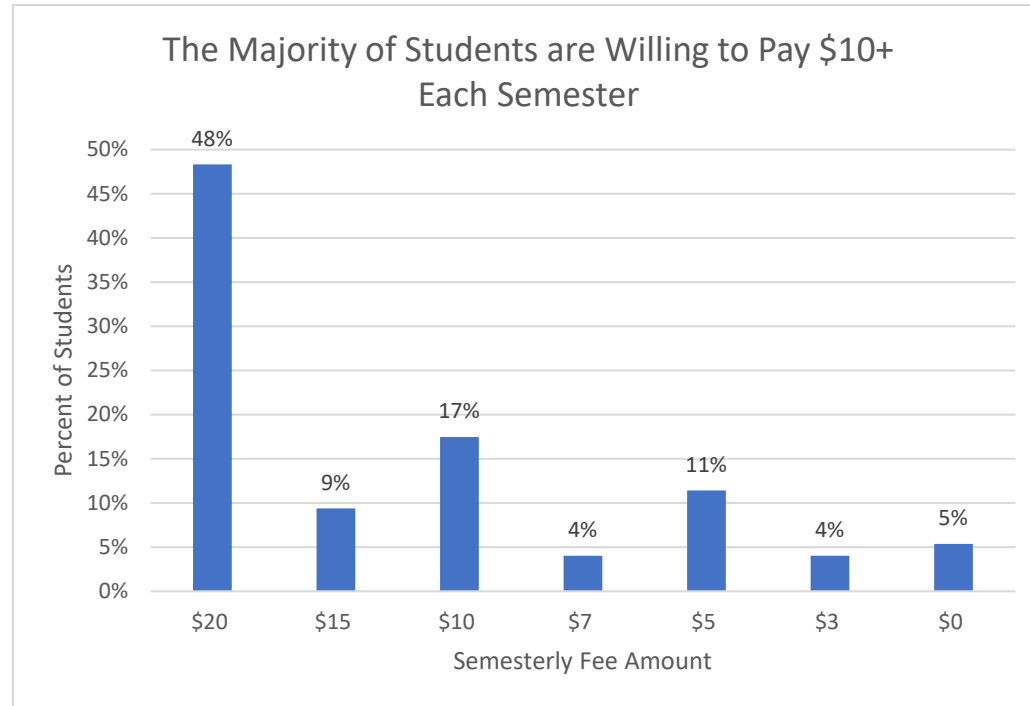
Graduate Student Board Member							
FTE	Hourly Wage	Annual Wages	ERE	Total Annual Wages + ERE	Number of Student Board Members	Total Undergraduate Student Wages	Rounded Up to Nearest \$1,000
0.5	\$15	\$10,500	\$189.00	\$10,689.00	1	\$10,689	\$11,000

Total Personnel
\$99,000

SURVEY

Question 1: Would you support a new			
Response	Count	Percent	
Yes	117	79%	
No	8	5%	
Maybe	24	16%	
	149	100%	

Question 2: What is the maximum amount you would be willing to pay per semester?			
Response	Count	Percent	
\$20	72	48%	
\$15	14	9%	
\$10	26	17%	
\$7	6	4%	
\$5	17	11%	
\$3	6	4%	
\$0	8	5%	
	149	100%	





To whom it may concern:

The Executive officers of the Associated Students at the University of Arizona are proud to support the establishment of a student fee by Students for Sustainability. As the state of the world and the environment becomes more critical, college campuses should continue to be at the forefront of education and innovation when it comes to battling the environmental crisis. To date, Students for Sustainability has been able to provide strong educational programming to our campus community, in order to spread awareness and provide incentives for living more sustainably. They have also established strong campus partnerships and headed initiatives at the institutional level. The Green Fund has been able to fund smaller projects on campus as well. However, our current structure leaves little room for larger sustainability projects. The establishment of a fee at the University will ensure that students are at the forefront of this change, pushing the University of Arizona community to be more mindful and aware of their environmental impact. Through the Sustainability fee board, students and campus representatives can help our campus undertake the following for years to come:

- Reduce water waste
- Reduce energy use
- Reduce greenhouse gas emissions
- Offset carbon emissions
- Reduce food waste
- Reduce plastic use and consumer waste

By establishing this fee, the UA will be able to adapt and mold to our world, as well as hopefully emerge as a leader in these areas. We support this fund and fee allocation structure as a way to support initiatives that will both better our campus community and lessen our negative environmental impact. Thank you for your consideration, we are proud to support this student-led initiative.

Signed,

Tara Singleton
Student Body President

Maryan Hassan
Administrative Vice President

Noah Vega
Executive Vice President

OTHER FEE REQUEST - CHANGE TO EXISTING

University: University of Arizona College/School: Office of the Provost
 Department: Enrollment Management Program: Freshmen Enrollment Fee
 Both Graduate Undergraduate Lower Division Choose One Option

\$ 425 /semester \$ 450 /semester Effective Date of Change: Fall 2022
 Current Fee Proposed Fee (this field you may enter other option just by typing it in box)

Other Fee History:

Date Established	Fall	2005	and original amount	\$ <u>270</u>
Most Recent Date and Change to fee (Date/Amount)	Fall	2018		\$ <u>425</u>

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The enrollment fee was created as a mandatory, one-time fee as a way to simplify and consolidate pre-enrollment payments to benefit students and to better gauge the commitment of students to attend the UA. By analyzing fee payment throughout the admissions cycle, Enrollment Management is able to track progress towards ABOR goals and adjust recruitment and yield initiatives to shape the incoming class accordingly.

The Office of Orientation & New Student Services, a unit of Enrollment Management, proposes to increase the Enrollment Fee by \$25 for all student types, beginning with undergraduate students enrolling for summer/fall 2022. This will increase the main campus, domestic first-year and the global/international student fee from \$425 to \$450 and will increase the main campus, domestic transfer enrollment fee \$150 to \$175. The last the enrollment fee was increased was in 2018.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

The reason for the proposed fee increase is to offer a new extended orientation program for all incoming students. The purpose of the extended orientation program is to build community among the incoming class and educate them about the institutional expectations and what it means to be an Arizona Wildcat. The extended orientation program is in addition to all other regular programming and services. Institutions that have piloted an extended orientation program have seen an increase in student success and retention. See proposal for details. The increase in the Enrollment Fee will be used to partially fund this new program and applies to new undergraduates only. The Enrollment Fee is a one-time fee. As always, qualifying students may request to defer the Enrollment Fee until the semester's tuition/fees are due and utilize financial aid to cover the total cost.

Student Consultation (Please describe the method and outcomes of student consultation)

We had the opportunity to meet with current students who serve as orientation leaders. During our meeting, we described the reason for the proposed increase and explain details of our new program. These are a few of the responses that students shared after listening to our proposal.

- "I think the value of the services provided by the extended orientation program exceeds the monetary increase of 25 dollars and I would not have qualms with the new proposed price increase."
- "Given the good the extended orientation will do, I feel it is completely worth the increase in the enrollment fee. In the state our world is in, it is so hard for incoming students to find their place and learn all they need to during normal orientation. Extended orientation will be the perfect place for students to find their place at the University and have a refresher of orientation right before school starts! With the enrollment fee already being so high, 25 dollars won't make much of a difference, and most incoming students won't even be aware that there was an increase. I say it a great idea and completely worth the increase."
- "Though I am generally against any additional fees for incoming students, based upon the information that has been presented to me about the planned changes coming to the New Student Orientation program, I feel that the marginal increase in cost of \$25 being added to the enrollment fee is worth what I believe will be the eventual benefits that students receive in return from the program being funded by such a cost increase."

In addition, Tara Singleton, ASUA Student Body President, shared, "I think this is a great way to make time for a real integration into u of a life for new students and families. It also touches on a lot of the things we want to see incoming students learning about (Title IX, cultural competency etc). I think this would be a great platform for student involvement events and information sessions as well." and "Yes this has my support, excited to see how ASUA can help welcome our new students in the future." Also, the Associated Students of the University of Arizona (ASUA) and the Graduate Professional Student Council (GPSC) are the student government on the University of Arizona campus that is comprised of students who are willing to go above and beyond and serve their school and peers. ASUA and GPSC executive officers attend the annual university fees meeting and review to ensure the benefit to the students paying the fee.

Proposed Annual Revenue

Other Fee Amount	\$	\$ 450.00
Number of Students	#	7,500
Total Revenue	=	\$ 3,375,000.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 320,625.00
Orientation, Extended Orientation & EM Costs	\$	\$ 1,832,625.00
Placement Exams, Student ID, etc.	\$	\$ 884,250.00
Student Success Support / Retention	\$	\$ 337,500.00
Total Expenditures	=	\$ 3,375,000.00



OTHER FEE REQUEST - CHANGE TO EXISTING

University: University of Arizona College/School: Office of the Provost
 Department: Transfer Enrollment Fee Program: Transfer Enrollment Fee
 Both Graduate Undergraduate Lower Division Choose One Option

\$ 150 /semester \$ 175 /semester Effective Date of Change: Fall 2022
 Current Fee Proposed Fee (this field you may enter other option just by typing it in box)

Other Fee History:

Date Established	Fall	2014	and original amount	\$ 95
Most Recent Date and Change to fee (Date/Amount)	Fall	2018		\$ 150

Purpose (Please provide a brief statement detailing the purpose of the fee, including the anticipated expenditures of fee revenue and benefits the fee will provide students. Include an explanation of the additional benefits funded by the increase.)

The enrollment fee was created as a mandatory, one-time fee as a way to simplify and consolidate pre-enrollment payments to benefit students and to better gauge the commitment of students to attend the UA. By analyzing fee payment throughout the admissions cycle, Enrollment Management is able to track progress towards ABOR goals and adjust recruitment and yield initiatives to shape the incoming class accordingly.

The Office of Orientation & New Student Services, a unit of Enrollment Management, proposes to increase the Enrollment Fee by \$25 for all student types, beginning with undergraduate students enrolling for summer/fall 2022. This will increase the main campus, domestic first-year and the global/international student fee from \$425 to \$450 and will increase the main campus, domestic transfer enrollment fee \$150 to \$175. The last time the enrollment fee was increased was in 2018.

Justification (Please provide a brief statement on what the proposal is intended to pay for and how much of the costs will be covered by the incremental revenue)

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Student Consultation (Please describe the method and outcomes of student consultation)

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Proposed Annual Revenue

Other Fee Amount	\$	\$ 175.00
Number of Students	#	2,000
Total Revenue	=	\$ 350,000.00

Proposed Annual Expenditures

Administrative Service Charge	\$	\$ 33,250.00
Transfer Student Orientation & Ext. Orientation	\$	\$ 194,575.00
Transfer Student Center Support	\$	\$ 85,975.00
Enrollment Management Technology & Comm.	\$	\$ 36,200.00
Total Expenditures	=	\$ 350,000.00

**UA EXISTING DIFFERENTIAL TUITION AND PROGRAM FEES SUMMARY
 2020-2021**

DATE ESTABLISHED	COLLEGE/SCHOOL	PROGRAM	GR/UNDER	AMOUNT (per semester, per unit or fixed)	2020-2021 Estimated Annual Revenue
DIFFERENTIAL TUITION					
2005	Architecture, Planning & Landscape Architecture	Bachelor of Architecture Lower & Upper Divisions	Undergraduate	\$750 (\$375 Fr)/sem	\$604,261
2011	Engineering	Undergraduate Lower Division	Undergraduate	\$450/sem	\$1,186,482
2006	Engineering	Undergraduate Upper Division	Undergraduate	\$900/sem	\$2,054,914
2010	Fine Arts	All Undergraduate Degree Programs in Schools of Art, Dance, Music, and Theatre, Film & Television	Undergraduate	\$300/sem	\$409,086
2003	Management	All Undergraduate Professional Programs in Management, Upper Division	Undergraduate	\$900/sem	\$3,432,337
2009	Nursing	BSN Program, Undergraduate Upper Division	Undergraduate	\$2,000/sem	\$838,167
2010	Public Health	Bachelor of Science Public Health Upper Division	Undergraduate	\$50/unit	\$437,126
PROGRAM FEES					
2016	Agriculture & Life Sciences	Career & Academic Services Lower & Upper Divisions	Undergraduate	\$75/sem	\$344,769
2010	Agriculture & Life Sciences	Norton School of Family & Consumer Resources: Family Studies & Human Development Upper Division	Undergraduate	\$200/sem	\$66,200
2018	Agriculture & Life Sciences	Norton School of Family & Consumer Resources: Personal & Family Financial Planning Upper Division	Undergraduate	\$250/sem	\$24,250
2010	Agriculture & Life Sciences	Norton School of Family & Consumer Resources: Retail & Consumer Sciences Upper Division	Undergraduate	\$250/sem	\$55,693
2015	Agriculture & Life Sciences	Nutritional Sciences: Undergraduate Lower & Upper Divisions	Undergraduate	\$250/sem	\$224,292
2018	Agriculture & Life Sciences	Nutritional Sciences: Nutrition & Food Systems Lower & Upper Divisions	Undergraduate	\$250/sem	\$15,384
2016	Agriculture & Life Sciences	Soil, Water & Environmental Science: BS in Environmental Science Upper Division	Undergraduate	\$350/sem	\$73,797
2004	Architecture, Planning & Landscape Architecture	Master of Landscape Architecture & Master of Architecture	Graduate	\$1,500/sem	\$184,794
2004	Architecture, Planning & Landscape Architecture	Master of Science in Architecture & Master of Science in Planning	Graduate	\$1,500/sem	\$49,500
2010	Architecture, Planning & Landscape Architecture	Master of Real Estate Development	Graduate	\$4,450/sem	\$80,100
2010	Fine Arts	Art: Masters & Doctoral Degree Programs	Graduate	\$300/sem	\$40,050
2010	Fine Arts	Dance: Master of Fine Arts In Dance	Graduate	\$300/sem	\$4,800
2010	Fine Arts	Music: Masters of Music, Doctor of Musical Arts, Doctor of Philosophy	Graduate	\$300/sem	\$68,716
2010	Honors College	Undergraduate Honors Education Lower & Upper Divisions	Undergraduate	\$250/sem	\$1,838,639
2013	Law	Master of Legal Studies (MLS)	Professional	\$26,000 fx \$866.67/unit	\$114,963
2002	Law	Masters of Law (LLM) & Doctor of Judicial Science (SJD)	Professional	\$26,000 fixed	\$108,237
2013	Law	Master of Professional Studies in Indigenous Governance (MPS)	Professional	\$26,000 fx \$866.67/unit	\$0
2002	Law	Juris Doctor (JD), Resident	Professional	\$24,500 fixed	\$2,098,692
2002	Law	Juris Doctor (JD), Non-Resident	Professional	\$29,000 fixed	\$0
2002	Law	Juris Doctor with Advanced Standing (AJD), Resident	Professional	\$24,500 fixed	\$0
2002	Law	Juris Doctor with Advanced Standing (AJD), Non-Resident	Professional	\$29,000 fixed	
2013	Management	Undergraduate Pre-Business Program Lower Division	Undergraduate	\$350/sem	\$1,951,614

**UA EXISTING DIFFERENTIAL TUITION AND PROGRAM FEES SUMMARY
 2020-2021**

DATE ESTABLISHED	COLLEGE/SCHOOL	PROGRAM	GR/UNDER	AMOUNT (per semester, per unit or fixed)	2020-2021 Estimated Annual Revenue
2018	Management	Undergraduate Pre-Economics Program Lower Division	Undergraduate	\$350/sem	\$75,786
2003	Management	Undergraduate Advanced Standing - Summer/Winter Sessions only	Undergraduate	\$50/unit	\$321,700
1997	Management	All Masters Programs Delivered by Eller College of Management.	Graduate	\$5,750/sem	\$2,968,365
1998	Management	Eller MBA Program: Evening MBA	Graduate	\$51,000 fixed	\$599,406
2005	Management	Eller MBA Program: Executive MBA	Graduate	\$63,000 fixed	\$890,375
2014	Medicine	Cellular & Molecular Medicine: Master of Science	Graduate	\$50/unit	\$33,250
2016	Medicine	Cellular & Molecular Medicine: Graduate Certificate in Biomedical Sciences	Graduate	\$50/unit	\$150
2017	Medicine	Cellular & Molecular Medicine: Genetic Counseling Graduate Program	Graduate	\$3,000	\$60,000
2016	Medicine	Pharmacology: MS in Pharmacology/Perfusion Sciences	Graduate	\$500/sem	\$7,000
2011	Nursing	Master's Entry to Professional Nursing	Graduate	\$44,000 fixed 2 Yr Program-Res; \$53,000 fixed 2 Yr Program-Non Res	\$2,170,285
PhD 2003 DNP 2006	Nursing	Doctor of Nursing Practice (DNP) and PhD	Graduate	\$2,600/sem	\$400,844
1995	Pharmacy	Doctor of Pharmacy	Graduate	\$6,725/sem	\$6,973,110
2012	Public Health	Public Health Graduate Certificates - Health Administration	Graduate	\$250/unit	\$13,625
2017	Public Health	Public Health Graduate Certificates - Arizona Clinical & Translational Research	Graduate	\$250/unit	\$11,679
2013	Public Health	MD-Masters of Public Health, Phoenix Campus	Graduate	\$750/sem	\$21,750
2013	Public Health	MD-Public Health Certificate, Phoenix Campus	Graduate	\$600/sem	\$1,650
MPH 2005 DrPH 2006 PhD 2010 PhD HBHP 2014	Public Health	All Graduate Degree Programs: MPH, MS, PhD & DrPH in Public Health	Graduate	\$75/unit	\$418,063
2014	Science	Computer Science: BS & BA Lower Division	Undergraduate	\$150/sem	\$218,018
2014	Science	Computer Science: BS & BA Upper Division	Undergraduate	\$300/sem	\$362,306
2019	Science	Computer Science: MS in Computer Science	Graduate	400/sem	\$25,600
2014	Science	Geosciences: BS, Lower & Upper Divisions	Undergraduate	\$150/sem	\$54,750
2015	Science	Mind, Brain & Behavior: Neuroscience & Cognitive Science Pre-Majors	Undergraduate	\$65/sem	\$38,675
2015	Science	Mind, Brain & Behavior: Neuroscience & Cognitive Science Majors	Undergraduate	\$400/sem	\$194,265
2016	Science	Mind, Brain & Behavior, Psychology: Psychological Science Upper Division	Undergraduate	\$200/sem	\$94,172
2016	Science	Speech, Language & Hearing Sciences: Bilingual Certificate Program	Graduate	\$500/sem	\$26,000
2016	Science	Speech, Language & Hearing Sciences: Clinical MS in Speech-Language Pathology	Graduate	\$500/sem	\$72,000
2016	Science	Speech, Language & Hearing Sciences: Doctor of Audiology	Graduate	\$750/sem	\$54,825

**UA EXISTING DIFFERENTIAL TUITION AND PROGRAM FEES SUMMARY
 2020-2021**

DATE ESTABLISHED	COLLEGE/SCHOOL	PROGRAM	GR/UNDER	AMOUNT (per semester, per unit or fixed)	2020-2021 Estimated Annual Revenue
2010	Social & Behavioral Sciences	Geography & Development: BA in Geography, BS in Geography & BS in Regional Development	Undergraduate	\$125/sem	\$46,659
2012	Social & Behavioral Sciences	Geography & Development: Masters in Development Practice	Graduate	\$750/sem fall & spr; \$500/summer	\$28,581
2010	Social & Behavioral Sciences	Geography & Development and Natural Resources & Environment: Master of Science in Geographic Information Systems Technology	Graduate	\$100/unit	\$42,450
2014	Social & Behavioral Sciences	Government & Public Policy: BA in Law Upper Division	Undergraduate	\$900/sem	\$569,893
2013	Social & Behavioral Sciences	Government & Public Policy: BA in Political Science, BS in Criminal Justice & BS in Public Management and Public Policy - Upper Division	Undergraduate	\$450/sem	\$697,125
2001	Social & Behavioral Sciences	Government & Public Policy: Masters in Public Administration	Graduate	\$1,250/sem	\$128,820
2016	Social & Behavioral Sciences	Government & Public Policy: Masters in Public Policy	Graduate	\$1,250/sem	\$37,500
2008	Social & Behavioral Sciences	Journalism: Bachelor's Degree in Journalism Lower & Upper Divisions	Undergraduate	\$250/sem	\$151,137
2009	Social & Behavioral Sciences	Journalism: Master's Degrees in Journalism	Graduate	\$100/unit	\$38,100
2010	Social & Behavioral Sciences	Linguistics: MS in Human Language Technology	Graduate	\$250/sem	\$5,250
2010	Social & Behavioral Sciences	Philosophy, Government & Public Policy, Economics, Center for Philosophy of Freedom: Philosophy, Politics, Economics and Law BA - Upper Division	Undergraduate	\$400/sem	\$70,400
2015	Social & Behavioral Sciences	School of Information Masters Programs	Graduate	\$50/unit	\$59,700
2014	Social & Behavioral Sciences	Sociology: BS in Care, Health & Society Upper Division	Undergraduate	\$300/sem	\$84,551
2014	Social & Behavioral Sciences	Sociology: BA in Sociology Upper Division	Undergraduate	\$300/sem	\$46,330
Program Fees Eliminated:					
DATE EST	COLLEGE/SCHOOL	PROGRAM	GR/UNDER	AMOUNT	Estimated Annual Revenue
2012	Architecture, Planning & Landscape Architecture	Graduate Certificate in Heritage Conservation	Graduate	\$200/unit	\$9,400
2016	Veterinary Medicine	Doctor of Veterinary Medicine	Graduate	\$8,000/sem Fall & Spr \$8,043 Summer Res \$17,204 Summer Non-res	\$0

Deleted Class Fees in 2020-2021

Date Reviewed	Action	Current Status*	COLLEGE/SCHOOL	DEPARTMENT	Grad/ Undergrad	Master / Exclusive Course #	Request Type	Existing Fee per Term	AMOUNT REQUESTED	First Term
Jan-21	APPROVED	Removed	SBS	School of Information	U/G	ISTA 451/551	Delete	\$97	\$0	Fall 2021
Jan-21	APPROVED	Removed	SBS	School of Information	U	ISTA 251	Delete	\$97	\$0	Fall 2021
Oct-20	APPROVED	Removed	CALS	Sch of Nat Resource&Enviro-Res	U	RNR 230L	Delete	\$10	\$0	Spring 2021
Feb-20	APPROVED	Removed	Science	Geosciences	U/G	GEOS 450/550	Delete	\$25	\$0	Fall 2020
Feb-20	APPROVED	Removed	CALS	Sch of Plant Sciences	U	PLS 235	Delete	\$43	\$0	Fall 2020

Reduced Class Fees in 2020-2021

Date Reviewed	Action	Current Status*	COLLEGE/SCHOOL	DEPARTMENT	Grad/ Undergrad	Master / Exclusive Course #	Request Type	Existing Fee per Term	AMOUNT REQUESTED	First Term
Jan-21	APPROVED	Removed	Science	Geosciences	U	GEOS 251	Decrease	\$30	\$22	Fall 2021

Deleted Program Fees in 2020-2021

Date Reviewed	Action	Current Status*	COLLEGE/SCHOOL	DEPARTMENT	Grad/ Undergrad	PROGRAM	Request Type	Existing Fee per Term	AMOUNT REQUESTED	First Term
Mar-20	APPROVED	Removed	Veterinary Medicine	Veterinary Medicine	G	Doctor of Vterinary Medicine	Delete	\$8,000 Summer: \$8,043-R \$17,204-NR	0	Fall 2020

To be Deleted Program Fees in 2021-2022

Date Reviewed	Action	Current Status*	COLLEGE/SCHOOL	DEPARTMENT	Grad/ Undergrad	PROGRAM	Request Type	Existing Fee per Term	AMOUNT REQUESTED	First Term
Feb-21	PENDING	ACTIVE	CAPLA	School of Landscape Architecture and Planning	G	Graduate Certificate in Heritage Conservation	Delete	\$200	0	Fall 2021

University of Arizona

Student Housing

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University of Arizona Housing Rate Requests

The University of Arizona is not requesting a housing rental rate increase for the 2021-22 academic year. *The Honors Village dorm is a Public Private Partnership and will have a 2.4% rental rate increase per the master sub-lease agreement. \$53 per bed is added to the undergraduate rent to fund the Residence Hall Association (RHA).*

- Housing & Residential Life evaluated the climate in Higher Education in response to the pandemic and determined that it would be in the best interest of UArizona’s residential students not to recommend a rate increase for academic year 2021-22.
- The Residence Hall Association (RHA) Executive Board is supportive of no rate increase.
- The Honors Village dorm rates are governed by the master sub-lease agreement signed between American Campus Communities and the University of Arizona which requires a 2.4% rate increase each year of the 5-year lease or the campus housing average increase, whichever is higher. This year it will be 2.4%.

PROPOSED RATES FOR UNIVERSITY HOUSING 2021-2022

RESIDENCE	APPROVED FY 2021 RATE	PROPOSED FY 2022 RATE	\$ CHANGE	% INCREASE
UNDERGRADUATE DORMS				
<u>Group One</u>				
Babcock, Cochise (T), Coconino, Hopi, Kaibab-Huachuca, Maricopa (T), Navajo-Pinal	\$6,417	\$6,417	\$ 0	0%
<u>Group Two</u>				
Apache-Santa Cruz, Cochise, Gila, Graham-Greenlee, Manzanita-Mohave, Maricopa, Pima, Yavapai, Yuma	\$7,297	\$7,297	\$0	0%
<u>Group Three</u>				
Arizona-Sonora, Árbol de la Vida, Coronado, Likins, Colonia de la Paz, Posada San Pedro, Pueblo de la Cienega, Villa Del Puente	\$8,877	\$8,877	\$0	0%
<i>Undergraduate Increase</i>				0%

RESIDENCE	APPROVED FY 2021 RATE	PROPOSED FY 2022 RATE	\$ CHANGE	% INCREASE
GRADUATE APARTMENTS - La Aldea				
(Monthly rates, single occupancy per bedroom)				
One-bedroom, one bath	\$1,010	\$1,010	\$0	0%
Two-bedroom, two baths-unit A	\$ 770	\$ 770	\$0	0%
Two-bedroom, two baths-unit B	\$ 745	\$ 745	\$0	0%
Four-bedroom, four baths-unit AB	\$ 695	\$ 695	\$0	0%
Four-bedroom, four baths-unit C	\$ 680	\$ 680	\$0	0%
Four-bedroom, four baths-unit D	\$ 640	\$ 640	\$0	0%
Graduate Weighted Average Increase				0%
HONORS VILLAGE (Note #6)				
ACC Public Private Partnership - Undergraduate				
Dorm Room - Double Suite		\$ 9,287		
Dorm Room - Single Suite		\$12,077		
Dorm Room - Single		\$12,077		
Apartment - Two Bedroom shared		\$ 9,917		
Apartment - Two Bedroom shared large		\$10,487		
Apartment - Four Bedroom singles		\$12,747		
Apartment - Four bedroom singles full bed		\$12,957		

Notes:

- 1) The RHA fee of \$53 per student will be added to the above rates in all undergraduate facilities to support cultural, educational and social programming.
- 2) Undergraduate rates are for academic year and double occupancy unless otherwise noted. (T) indicates triple occupancy room.
- 3) All single occupancy rooms are 150% of double room rate in Groups 1, 2 & 3.
- 4) There is a \$150 nonrefundable application fee for undergraduate housing and \$50 nonrefundable application fee for graduate housing.
- 5) The proposed rates are per bed space.
- 6) Honors Village – American Campus Communities (ACC) Private Public Partnership rates will generate the ABOR established annual lease payment at 95% occupancy, including the master sub-lease yearly increase of 2.4% or the campus housing average increase, whichever is higher.

APPENDIX

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APPENDIX

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APPENDIX A

ARIZONA UNIVERSITY SYSTEM								
Incremental Tuition and Fee Revenue Estimates for FY 2021-22								
		ASU	NAU	UA (Excl COM)	UA COM	UA Vet Med	TOTAL UA	SYSTEM TOTAL
BASE TUITION								
UNDERGRADUATE								
Resident		9,159,000	(5,133,900)	(5,495,400)			(5,495,400)	(1,470,300)
Nonresident		34,781,600	(1,104,600)	5,706,600			5,706,600	39,383,600
Subtotal Undergraduate		43,940,600	(6,238,500)	211,200	-		211,200	37,913,300
GRADUATE								
Resident		10,511,600	2,337,000	506,400	486,500	2,203,200	3,196,100	16,044,700
Nonresident		31,300,400	831,100	364,500	60,700	4,284,000	4,709,200	36,840,700
Subtotal Graduate		41,812,000	3,168,100	870,900	547,200	6,487,200	7,905,300	52,885,400
Total Incremental Base Tuition		85,752,600	(3,070,400)	1,082,100	547,200	6,487,200	8,116,500	90,798,700
DIFFERENTIAL TUITION AND PROGRAM FEES								
Differential - Undergraduate							-	-
College Fee - Undergraduate		316,000					-	316,000
Program Fee - Undergraduate			51,200	1,131,500			1,131,500	1,182,700
Differential - Graduate							-	-
Program Fee - Graduate		3,636,900	248,000	(9,200)			(9,200)	3,875,700
Incremental Differential T&F from Summer/Winter/Other		46,846,500	611,700	8,321,900			8,321,900	55,780,100
Total Differential Tuition and Program Fees		50,799,400	910,900	9,444,200	-	-	9,444,200	61,154,500
COURSE FEES/OTHER		1,420,000	(272,200)	146,100	-	-	146,100	1,293,900
MANDATORY FEE REVENUE (EXCLUDING AFAT)		656,600	(539,000)	(337,000)	-	-	(337,000)	(219,400)
GROSS TUITION AND FEE REVENUE		138,628,600	(2,970,700)	10,335,400	547,200	6,487,200	17,369,800	153,027,700
Base Tuition - Regents Financial Aid Set Aside (RSA)	14%	12,427,000	(743,400)	(540,500)	34,500	681,200	175,200	11,858,800
Differential/Program Fee - Financial Aid Set Aside	14%	6,254,600	41,900	157,100			157,100	6,453,600
Subtotal		18,681,600	(701,500)	(383,400)	34,500	681,200	332,300	18,312,400
Additional Financial Aid		1,941,400	3,708,600	5,250,000	(527,700)	156,600	4,878,900	10,528,900
Total Incremental Financial Aid		20,623,000	3,007,100	4,866,600	(493,200)	837,800	5,211,200	28,841,300
NET TUITION AND FEE REVENUE (Net of Financial Aid)		118,005,600	(5,977,800)	5,468,800	1,040,400	5,649,400	12,158,600	124,186,400
Revenue from Enrollment Growth/Change in mix		85,752,600	(4,456,500)	196,200	335,600	6,487,200	7,019,000	88,315,100
Res (UG/Grad)		19,670,600	(3,746,100)	(5,495,400)	325,300	2,203,200	(2,966,900)	12,957,600
NR (UG/Grad)		66,082,000	(710,400)	5,691,600	10,300	4,284,000	9,985,900	75,357,500
Revenue from Rate Increase (Excludes Surcharge)		-	1,386,100	885,900	211,600	-	1,097,500	2,483,600
Res (UG/Grad)		-	-	-	-	-	-	-
NR (UG/Grad)		-	1,386,100	885,900	211,600	-	1,097,500	2,483,600
Total		85,752,600	(3,070,400)	1,082,100	547,200	6,487,200	8,116,500	90,798,700

APPENDIX B

History of FTE Enrollment Projection vs. Actual

	ASU	NAU	UA	Total
Enrollment				
Fall 17 Estimate	97,990	29,524	44,530	172,044
Fall 17 Actual	97,950	29,523	44,129	171,602
Variance	(40) 0.0%	(1) 0.0%	(401) -0.9%	(442) -0.3%
Fall 18 Estimate	102,175	30,320	45,034	177,529
Fall 18 Actual	103,654	29,384	44,376	177,414
	1,479 1.4%	(936) -3.1%	(658) -1.5%	(115) -0.1%
Fall 19 Estimate	109,904	29,734	44,516	184,154
Fall 19 Actual	110,538	29,175	44,714	184,427
	634 0.6%	(559) -1.9%	198 0.4%	273 0.1%
Fall 20 Estimate	115,401	26,799	40,180	182,380
Fall 20 Actual	116,997	28,078	45,516	190,591
	1,596 1.4%	1,279 4.8%	5,336 13.3%	8,211 4.5%
Fall 21 Estimate	122,423	27,380	45,703	195,506
Projected Increase over prior year actuals- Fall 2021 vs Fall 2020	5,426 4.6%	(698) -2.4%	187 0.4%	4,915 2.8%
UNDERGRADUATE				
Res	537	(688)	(558)	(709)
NR	2,517	(183)	357	2,691
GRADUATE				
Res	565	137	135	837
NR	1,807	36	253	2,096
Total	5,426	(698)	187	4,915
Est Fall 2020 Online Enrollment	4,294	(228)	756	4,822
Online as a % of projected incr	79%	33%	404%	98%

APPENDIX C

ARIZONA UNIVERSITY SYSTEM
 UNDERGRADUATE BASE TUITION AND MANDATORY FEES
 AT THE MAIN CAMPUSES OF ASU, NAU AND THE UA

RESIDENT										NONRESIDENT									
	ASU			CHANGE			NAU			CHANGE			UA			CHANGE			
	\$	\$	%	\$	\$	%	\$	\$	%	\$	\$	%	\$	\$	%	\$	\$	%	
PRESIDENT'S RECOMMENDATIONS										PRESIDENT'S RECOMMENDATIONS									
2021-22 New Student	11,348	10	0.1%	11,896	0	0.0%	12,671	0	0.0%	29,438	10	0.0%	26,642	0	0.0%	37,193	495	1.3%	
2020-21 New Student	11,338	0	0.0%	11,896	0	0.0%	12,671	0	0.0%	29,428	0	0.0%	26,642	126	0.5%	36,698	0	0.0%	
2019-20 New Student	11,338	516	4.8%	11,896	332	2.9%	12,671	224	1.8%	29,428	1,092	3.9%	26,516	688	2.7%	36,698	352	1.0%	
2018-19 New Student	10,822	30	0.3%	11,564	505	4.6%	12,447	219	1.8%	28,336	964	3.5%	25,828	987	4.0%	36,346	688	1.9%	
2017-18 New Student	10,792	152	1.4%	11,059	295	2.7%	12,228	459	3.9%	27,372	902	3.4%	24,841	697	2.9%	35,658	691	2.0%	
2016-17 New Student	10,640	162	1.5%	10,764	406	3.9%	11,769	366	3.2%	26,470	1,012	4.0%	24,144	796	3.4%	34,967	2,337	7.2%	
5-YR AVG ANNUAL INCR	1.6%			2.8%			2.1%			2.9%			2.7%			2.4%			
2015-16 New Student	10,478	321	3.2%	10,358	369	3.7%	11,403	446	4.1%	25,458	955	4.2%	23,348	839	3.7%	32,630	3,209	10.9%	
2014-15 New Student	10,157	155	1.5%	9,989	251	2.6%	10,957	566	5.4%	24,503	849	3.6%	22,509	416	1.9%	29,421	2,348	8.7%	
2013-14 New Student	10,002	282	2.9%	9,738	467	5.0%	10,391	356	3.5%	23,654	681	3.0%	22,093	467	2.2%	27,073	842	3.2%	
2012-13 New Student	9,720	4	0.0%	9,271	447	5.1%	10,035	0	0.0%	22,973	658	2.9%	21,626	447	2.1%	26,231	737	2.9%	
2011-12 New Student	9,716	1,588	19.5%	8,824	1,157	15.1%	10,035	1,798	21.8%	22,315	1,723	8.4%	21,179	1,112	5.5%	25,494	898	3.7%	
10-YR AVG ANNUAL INCR	6.9%			9.2%			9.0%			7.4%			5.8%			8.3%			

APPENDIX C1

ARIZONA UNIVERSITY SYSTEM
HISTORY OF UNDERGRADUATE BASE TUITION
 (TUITION RATES ONLY; DOES NOT INCLUDE MANDATORY FEES)

RESIDENT									
Year	ASU			NAU			UA		
	\$	\$	%	\$	\$	%	\$	\$	%
PRESIDENT'S RECOMMENDATIONS									
2021-22 New Student	10,710	0	0.0%	10,650	0	0.0%	11,299	0	0.0%
2020-21 New Student	10,710	0	0.0%	10,650	0	0.0%	11,299	0	0.0%
2019-20 New Student	10,710	606	6.0%	10,650	260	2.5%	11,299	222	2.0%
2018-19 New Student	10,104	0	0.0%	10,390	352	3.5%	11,077	217	2.0%
2017-18 New Student	10,104	150	1.5%	10,038	292	3.0%	10,860	108	1.0%
2016-17 New Student	9,954	150	1.5%	9,746	284	3.0%	10,752	362	3.5%
5-YR AVG ANNUAL INCR	1.8%			2.4%			1.7%		
2015-16 New Student	9,804	320	3.4%	9,462	342	3.8%	10,390	438	4.4%
2014-15 New Student	9,484	0	0.0%	9,120	249	2.8%	9,952	564	6.0%
2013-14 New Student	9,484	276	3.0%	8,871	418	4.9%	9,388	274	3.0%
2012-13 New Student	9,208	0	0.0%	8,453	444	5.5%	9,114	0	0.0%
2011-12 New Student	9,208	1,415	18.2%	8,009	1,045	15.0%	9,114	1,500	19.7%
10-YR AVG ANNUAL INCR	3.2%			4.3%			4.0%		

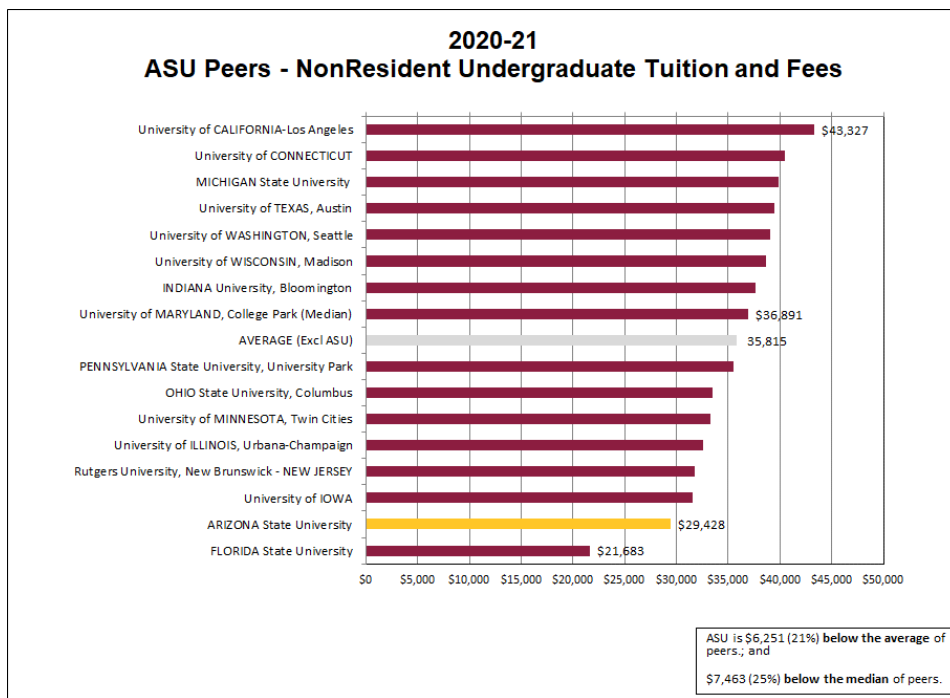
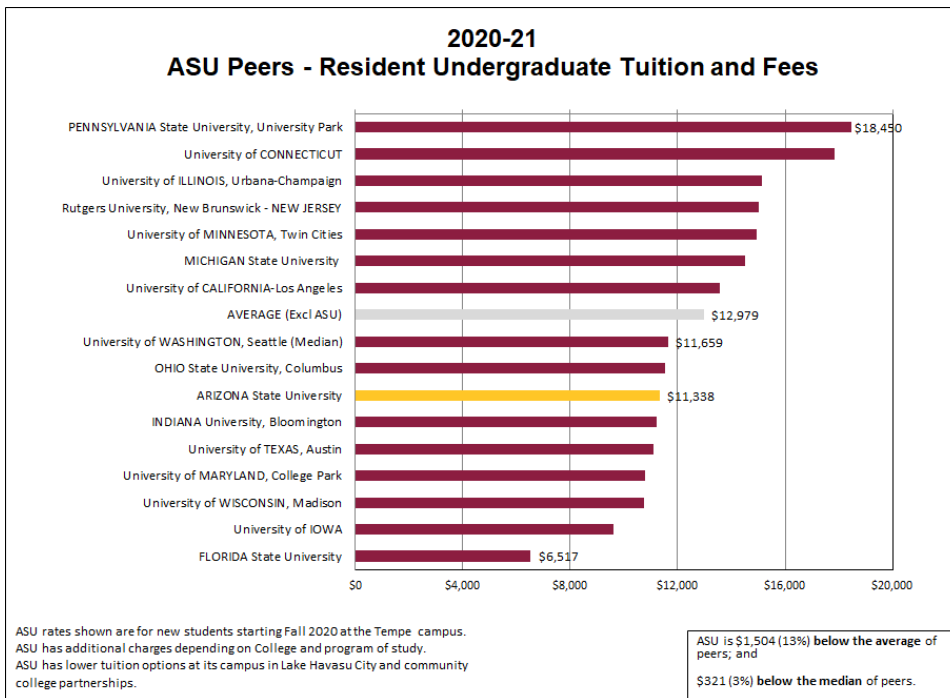
NON-RESIDENT									
Year	ASU			NAU			UA		
	\$	\$	%	\$	\$	%	\$	\$	%
PRESIDENT'S RECOMMENDATIONS									
2021-22 New Student	28,800	0	0.0%	25,396	0	0.0%	35,821	495	1.4%
2020-21 New Student	28,800	0	0.0%	25,396	126	0.5%	35,326	0	0.0%
2019-20 New Student	28,800	1,182	4.3%	25,270	616	2.5%	35,326	350	1.0%
2018-19 New Student	27,618	934	3.5%	24,654	834	3.5%	34,976	686	2.0%
2017-18 New Student	26,684	900	3.5%	23,820	694	3.0%	34,290	340	1.0%
2016-17 New Student	25,784	1,000	4.0%	23,126	674	3.0%	33,950	2,333	7.4%
5-YR AVG ANNUAL INCR	3.0%			2.5%			2.2%		
2015-16 New Student	24,784	954	4.0%	22,452	812	3.8%	31,617	3,201	11.3%
2014-15 New Student	23,830	694	3.0%	21,640	414	2.0%	28,416	2,346	9.0%
2013-14 New Student	23,136	675	3.0%	21,226	418	2.0%	26,070	760	3.0%
2012-13 New Student	22,461	654	3.0%	20,808	444	2.2%	25,310	737	3.0%
2011-12 New Student	21,807	1,550	7.7%	20,364	1,000	5.2%	24,573	600	2.5%
10-YR AVG ANNUAL INCR	3.6%			2.7%			4.0%		

APPENDIX D

**2020-21
 COST OF ATTENDANCE
 ASU Comparison Institutions
 (RANKED BY RESIDENT COA: HIGH TO LOW)**

	INSTITUTION	RESIDENT COA	NONRES COA	RES TUITION & FEES	NR TUITION & FEES	ROOM & BOARD	BOOKS & SUPPLIES
1	PENNSYLVANIA State University, University Park	32,608	49,672	18,450	35,514	12,318	1,840
2	University of CALIFORNIA-Los Angeles	32,486	62,240	13,573	43,327	17,599	1,314
3	University of CONNECTICUT	32,042	54,710	17,834	40,502	13,258	950
4	Rutgers University, New Brunswick - NEW JERSEY	29,902	46,684	15,003	31,785	13,549	1,350
5	University of ILLINOIS, Urbana-Champaign	28,602	46,052	15,150	32,600	12,252	1,200
	AVERAGE (Excl ASU)	26,744	49,581	12,979	35,815	12,639	1,126
6	University of WASHINGTON, Seattle	26,446	53,815	11,659	39,028	13,887	900
7	University of MINNESOTA, Twin Cities	26,301	44,599	14,943	33,241	10,358	1,000
8	MICHIGAN State University (Res COA - Median)	26,200	51,506	14,524	39,830	10,522	1,154
9	ARIZONA State University	26,019	44,109	11,338	29,428	13,510	1,171
10	OHIO State University, Columbus	25,626	47,610	11,518	33,502	13,026	1,082
11	University of MARYLAND, College Park	25,159	51,271	10,779	36,891	13,130	1,250
12	University of TEXAS, Austin	24,116	52,478	11,116	39,478	12,286	714
13	University of WISCONSIN, Madison	24,092	51,980	10,742	38,630	12,200	1,150
14	INDIANA University, Bloomington	22,513	48,893	11,221	37,601	10,258	1,034
15	University of IOWA	22,146	44,109	9,606	31,569	11,590	950
16	FLORIDA State University	18,605	33,771	6,517	21,683	11,088	1,000
	Average (Excl ASU)	26,456	49,293	12,842	35,679	12,488	1,126
	Median (Excl ASU)	26,200	49,672	11,659	36,891	12,286	1,082
Difference Between ASU and Peer Average		(437)	(5,184)	(1,504)	(6,251)		
		-2%	-12%	-13%	-21%		
Difference Between ASU and Peer Median		(181)	(5,563)	(321)	(7,463)		
		-1%	-13%	-3%	-25%		

APPENDIX D

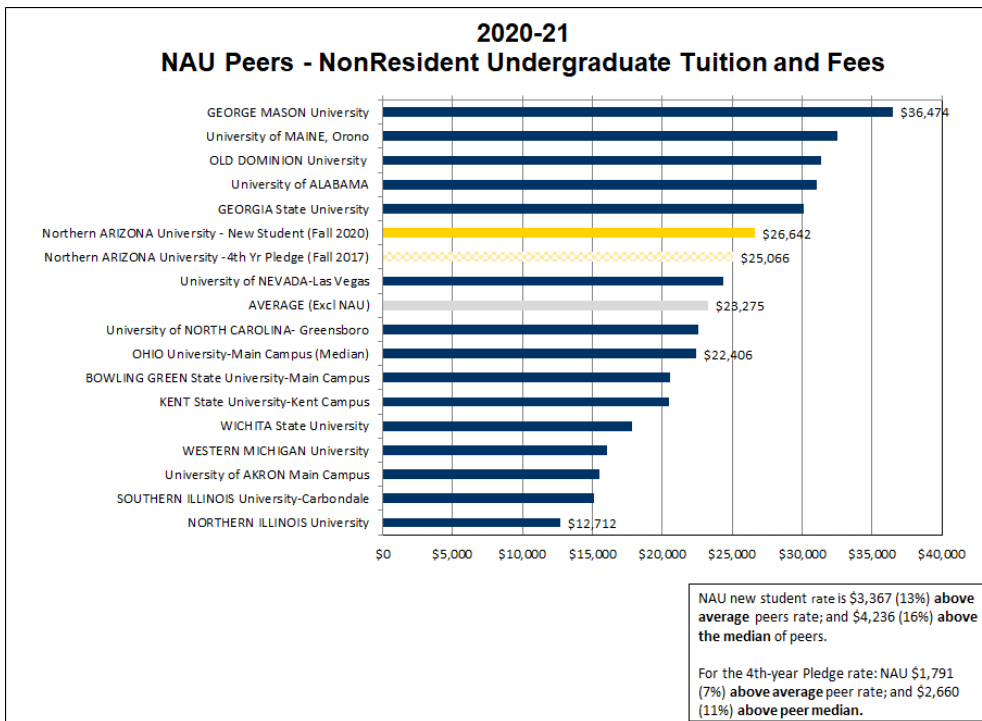
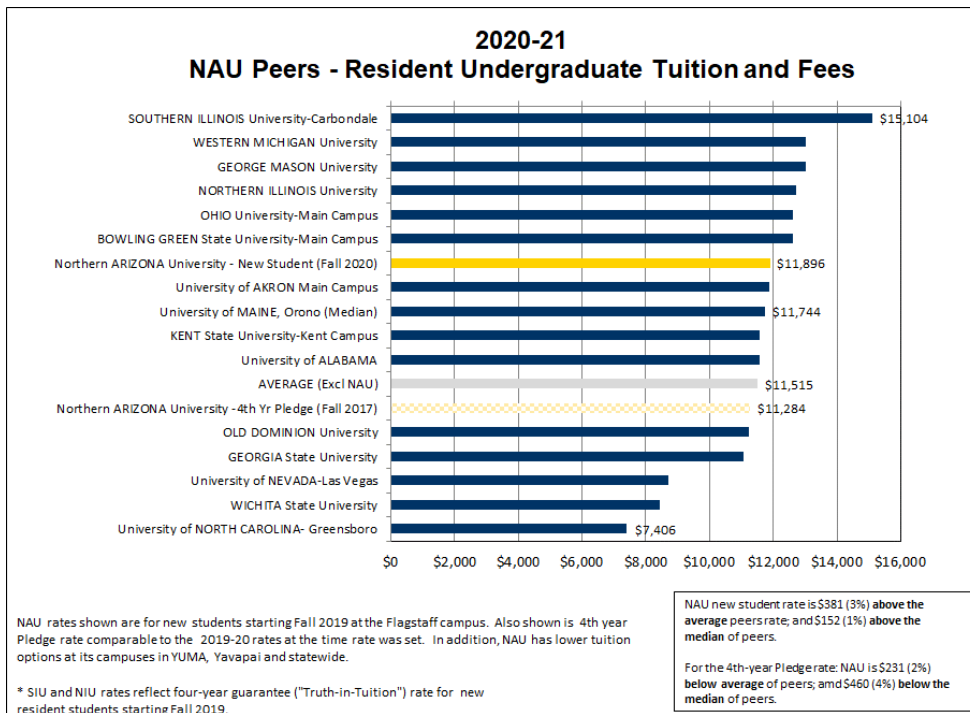


APPENDIX E
2020-21
COST OF ATTENDANCE
NAU Peers
(RANKED BY RESIDENT COA: HIGH TO LOW)

	INSTITUTION	RESIDENT COA	NONRES COA	RES TUITION & FEES	NR TUITION & FEES	ROOM & BOARD	BOOKS & SUPPLIES
1	GEORGIA State University	26,876	45,914	11,076	30,114	13,800	2,000
2	SOUTHERN ILLINOIS University-Carbondale	26,826	26,826	15,104	15,104	10,622	1,100
3	University of ALABAMA	26,390	45,860	11,580	31,050	13,810	1,000
4	GEORGE MASON University	26,382	49,842	13,014	36,474	12,090	1,278
5	OHIO University-Main Campus	25,768	35,562	12,612	22,406	12,172	984
6	University of AKRON Main Campus	25,690	29,310	11,880	15,500	12,810	1,000
7	OLD DOMINION University	25,523	45,683	11,235	31,395	12,988	1,300
8	NORTHERN ILLINOIS University (Median Res COA)	24,892	24,892	12,712	12,712	10,880	1,300
9	WESTERN MICHIGAN University	24,571	27,595	13,017	16,041	10,567	987
	AVERAGE (Excl NAU)	24,336	36,096	11,515	23,275	11,666	1,155
10	BOWLING GREEN State University-Main Campus	24,045	32,034	12,603	20,592	10,714	728
11	Northern ARIZONA University - New Student (Fall 2020)	24,002	38,748	11,896	26,642	11,106	1,000
12	University of MAINE, Orono	23,716	44,506	11,744	32,534	10,972	1,000
	Northern ARIZONA University -4th Yr Pledge (Fall 2017)	23,390	37,172	11,284	25,066	11,106	1,000
13	KENT State University-Kent Campus	23,298	32,174	11,588	20,464	10,548	1,162
14	WICHITA State University	22,294	31,659	8,434	17,799	12,610	1,250
15	University of NEVADA-Las Vegas	20,888	36,542	8,724	24,378	10,924	1,240
16	University of NORTH CAROLINA- Greensboro	17,888	33,047	7,406	22,565	9,482	1,000
	Average (Excl NAU)	24,336	36,096	11,515	23,275	11,666	1,155
	Median (Excl NAU)	24,892	33,047	11,744	22,406	10,972	1,100

New Student Rate				
Difference Between NAU and Peer Average	(334)	2,652	381	3,367
	-1%	7%	3%	13%
Difference Between NAU and Peer Median	(890)	5,701	152	4,236
	-4%	15%	1%	16%
4th Year - Pledge Rate				
Difference Between NAU and Peer Average (4th Yr)	(946)	1,076	(231)	1,791
	-4%	3%	-2%	7%
Difference Between NAU and Peer Median (4th Yr)	(1,502)	4,125	(460)	2,660
	-6%	11%	-4%	11%

APPENDIX E

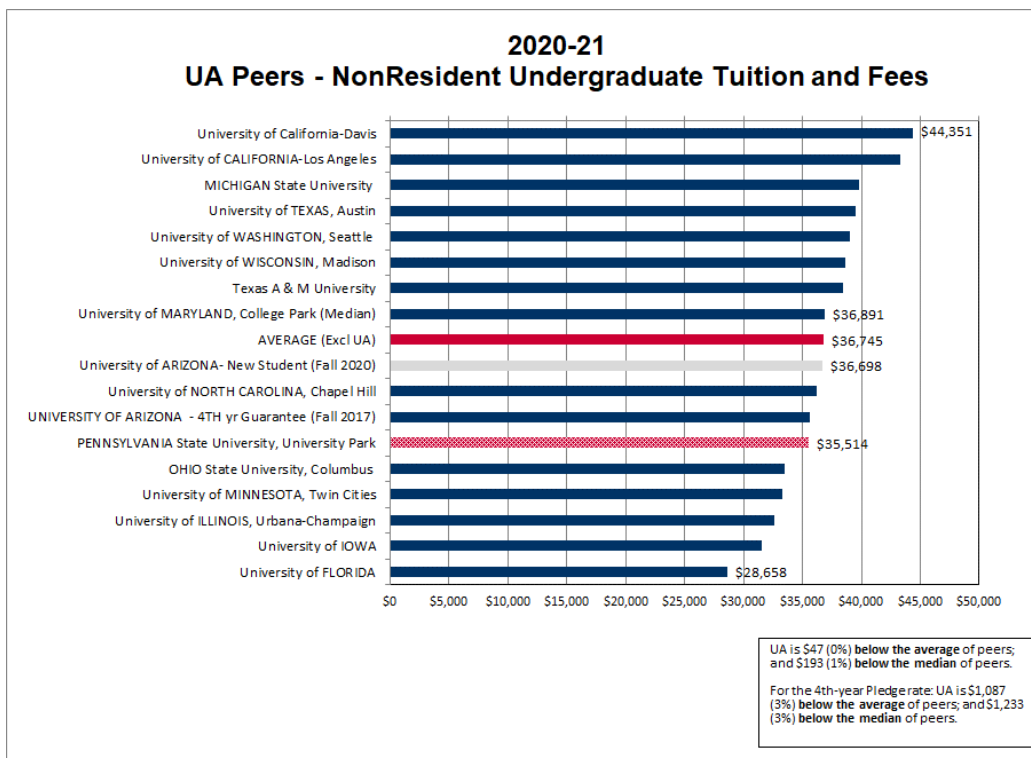
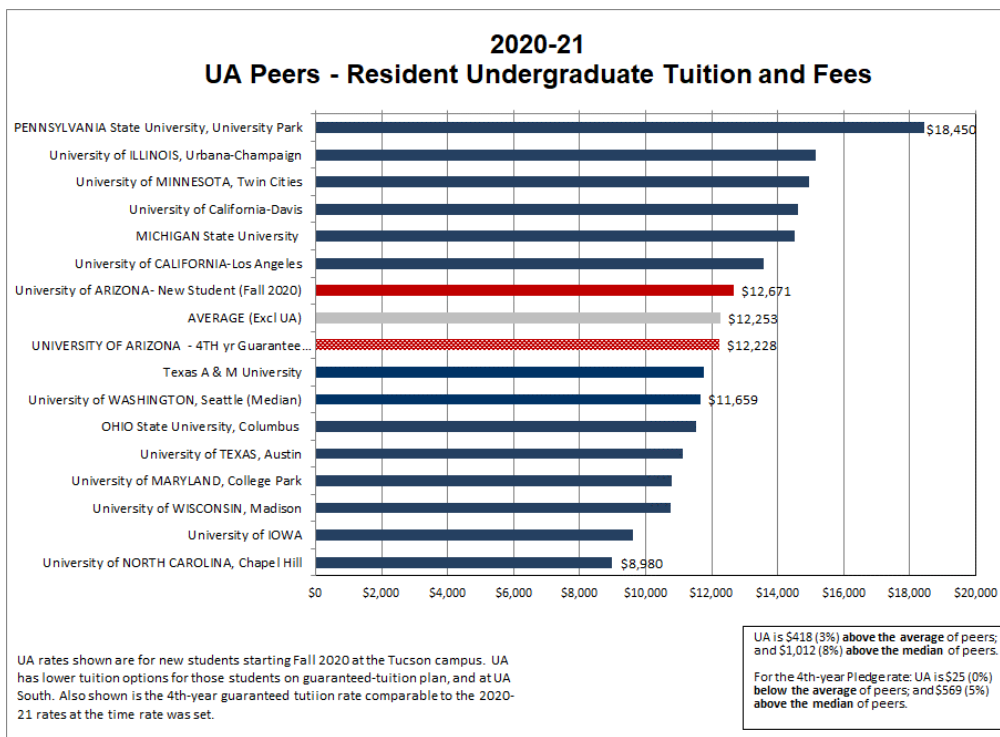


APPENDIX F
2020-21
COST OF ATTENDANCE
UA Comparison Institutions
(RANKED BY RESIDENT COA: HIGH TO LOW)

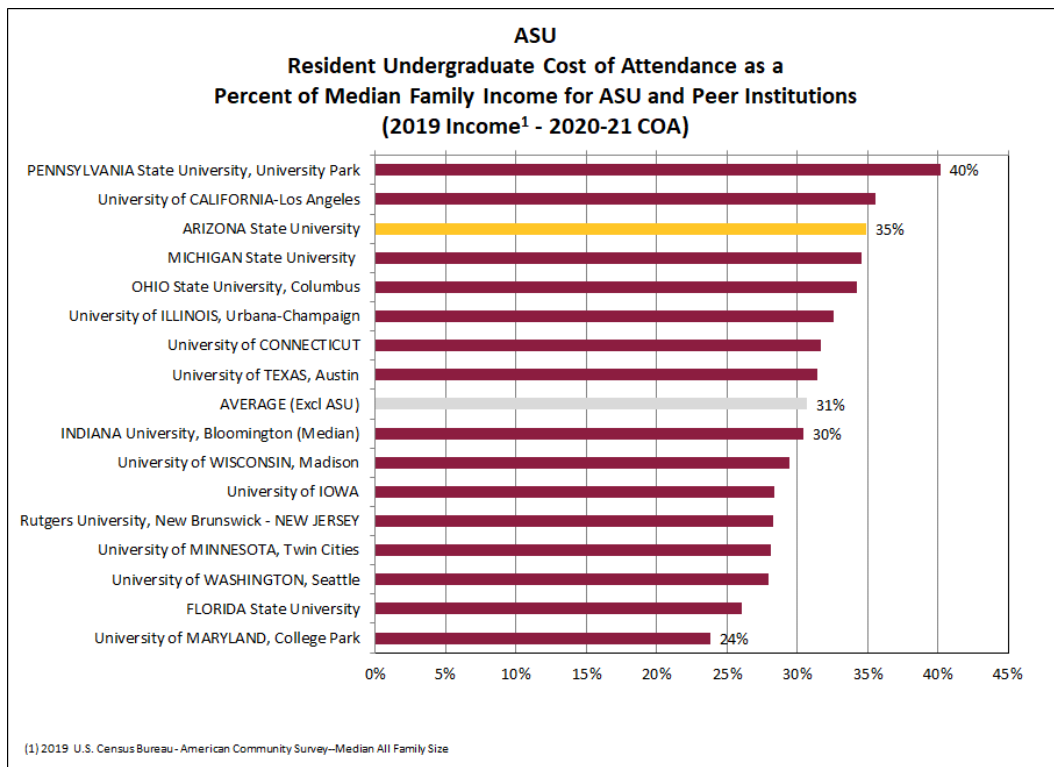
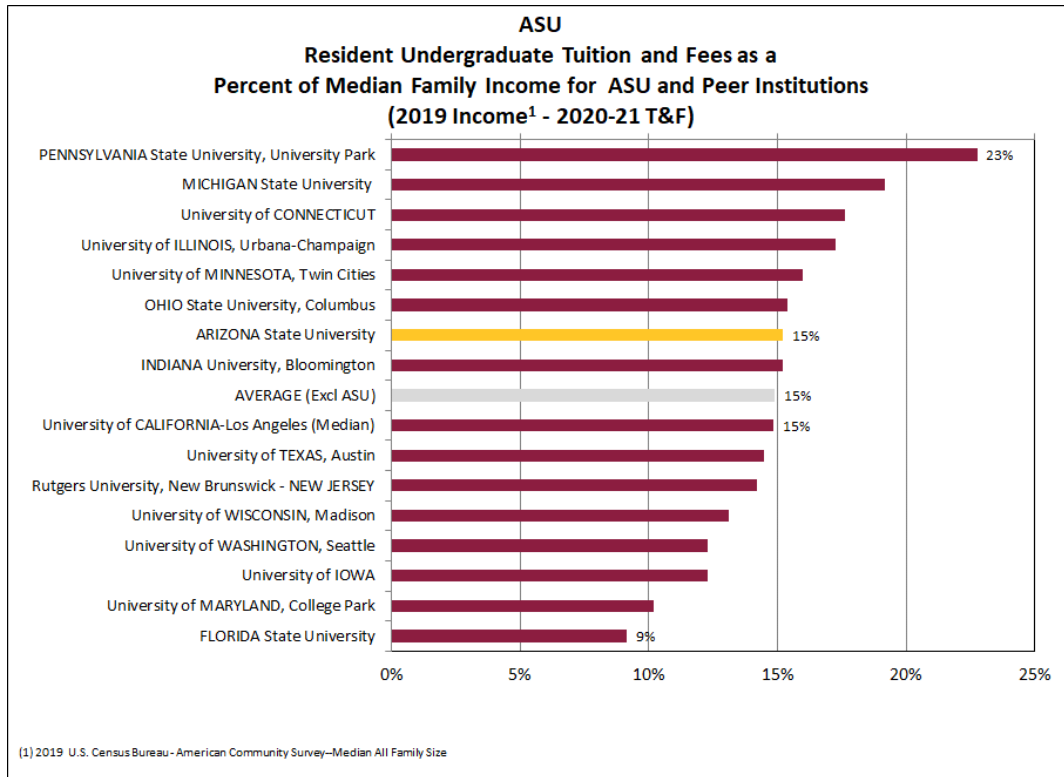
	INSTITUTION	RESIDENT COA	NONRES COA	RES TUITION & FEES	NR TUITION & FEES	ROOM & BOARD	BOOKS & SUPPLIES
1	University of California-Davis	33,013	62,767	14,597	44,351	17,238	1,178
2	PENNSYLVANIA State University, University Park	32,608	49,672	18,450	35,514	12,318	1,840
3	University of CALIFORNIA-Los Angeles	32,486	62,240	13,573	43,327	17,599	1,314
4	University of ILLINOIS, Urbana-Champaign	28,602	46,052	15,150	32,600	12,252	1,200
5	University of ARIZONA- New Student (Fall 2020)	26,821	50,848	12,671	36,698	13,350	800
6	University of WASHINGTON, Seattle	26,446	53,815	11,659	39,028	13,887	900
7	University of MINNESOTA, Twin Cities	26,301	44,599	14,943	33,241	10,358	1,000
8	MICHIGAN State University	26,200	51,506	14,524	39,830	10,522	1,154
	AVERAGE (Excl UA)	26,051	50,543	12,253	36,745	12,676	1,122
9	OHIO State University, Columbus (Median Res COA)	25,626	47,610	11,518	33,502	13,026	1,082
	UNIVERSITY OF ARIZONA - 4TH yr Guarantee (Fall 2017)	25,456	49,704	12,228	35,658	13,350	800
10	University of MARYLAND, College Park	25,159	51,271	10,779	36,891	13,130	1,250
11	Texas A & M University	24,394	51,016	11,772	38,394	11,400	1,222
12	University of TEXAS, Austin	24,116	52,478	11,116	39,478	12,286	714
13	University of WISCONSIN, Madison	24,092	51,980	10,742	38,630	12,200	1,150
14	University of IOWA	22,146	44,109	9,606	31,569	11,590	950
15	University of NORTH CAROLINA, Chapel Hill	21,710	48,889	8,980	36,159	11,740	990
16	University of FLORIDA	17,861	40,138	6,381	28,658	10,590	890
	Average Resident (Excl UA)	26,051	50,543	12,253	36,745	12,676	1,122
	Median Resident (Excl UA)	25,626	51,016	11,659	36,891	12,252	1,150

New Student Rate				
Difference Between UA and Peer Average	770	305	418	(47)
	3%	1%	3%	0%
Difference Between UA and Peer Median	1,195	(168)	1,012	(193)
	4%	0%	8%	-1%
4th Year - Pledge Rate				
Difference Between UA and Peer Average (4th Yr)	(595)	(839)	(25)	(1,087)
	-2%	-2%	0%	-3%
Difference Between UA and Peer Median (4th Yr)	(170)	(1,312)	569	(1,233)
	-1%	-3%	5%	-3%

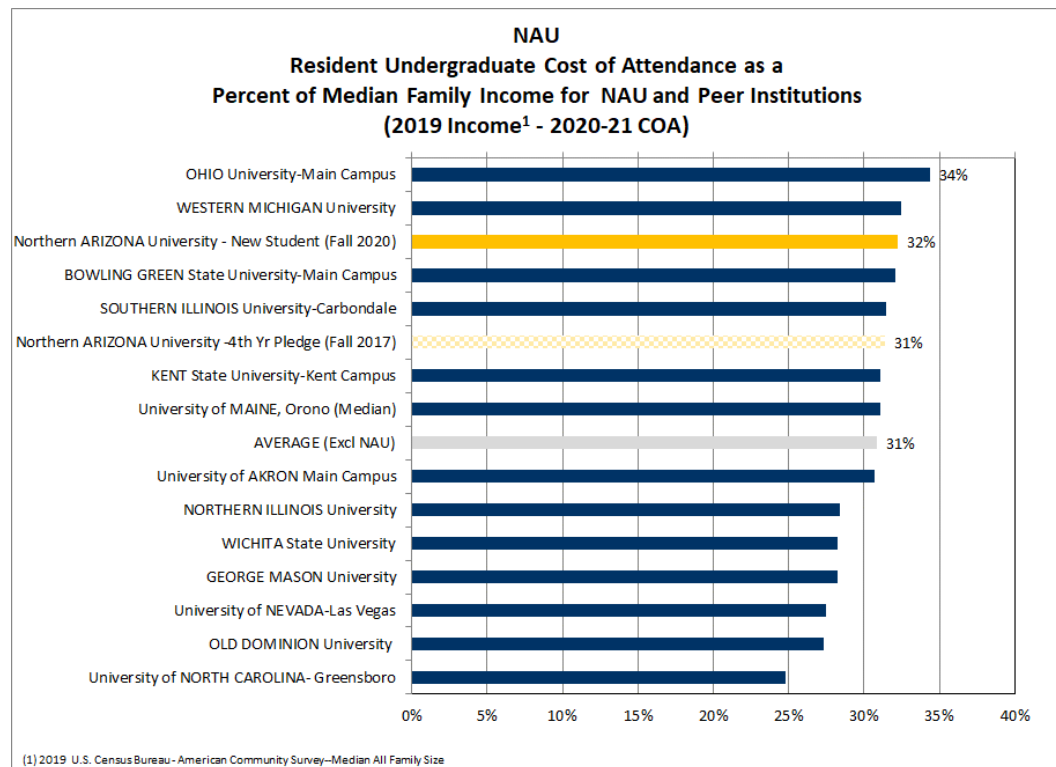
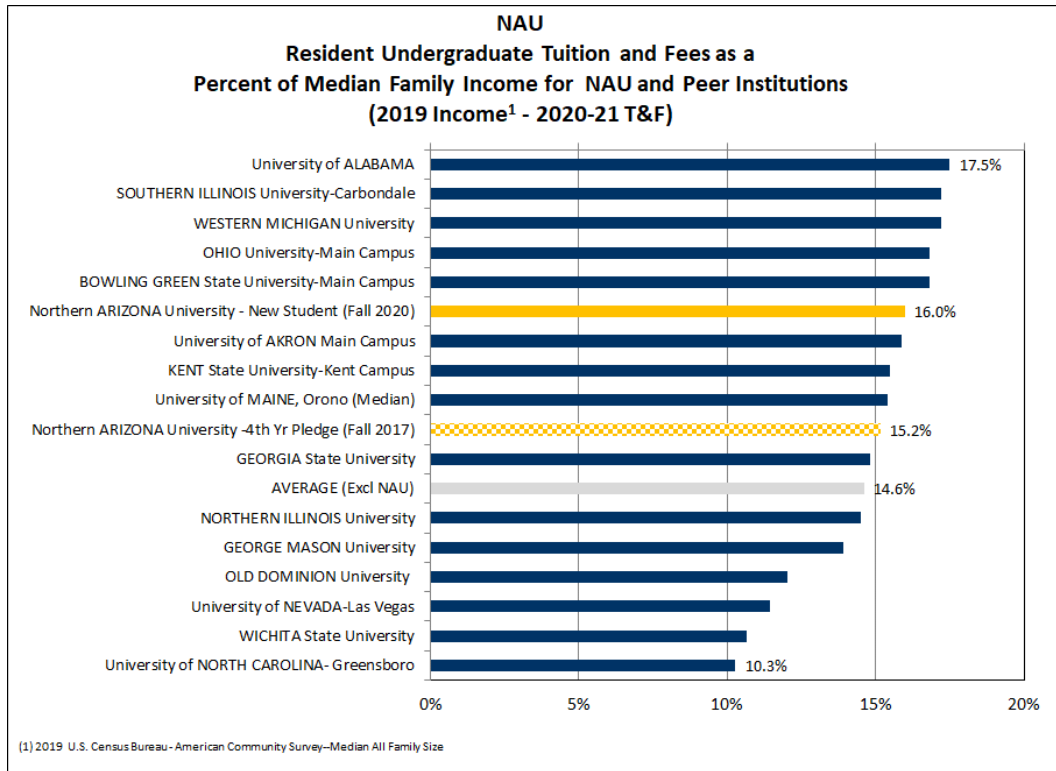
APPENDIX F



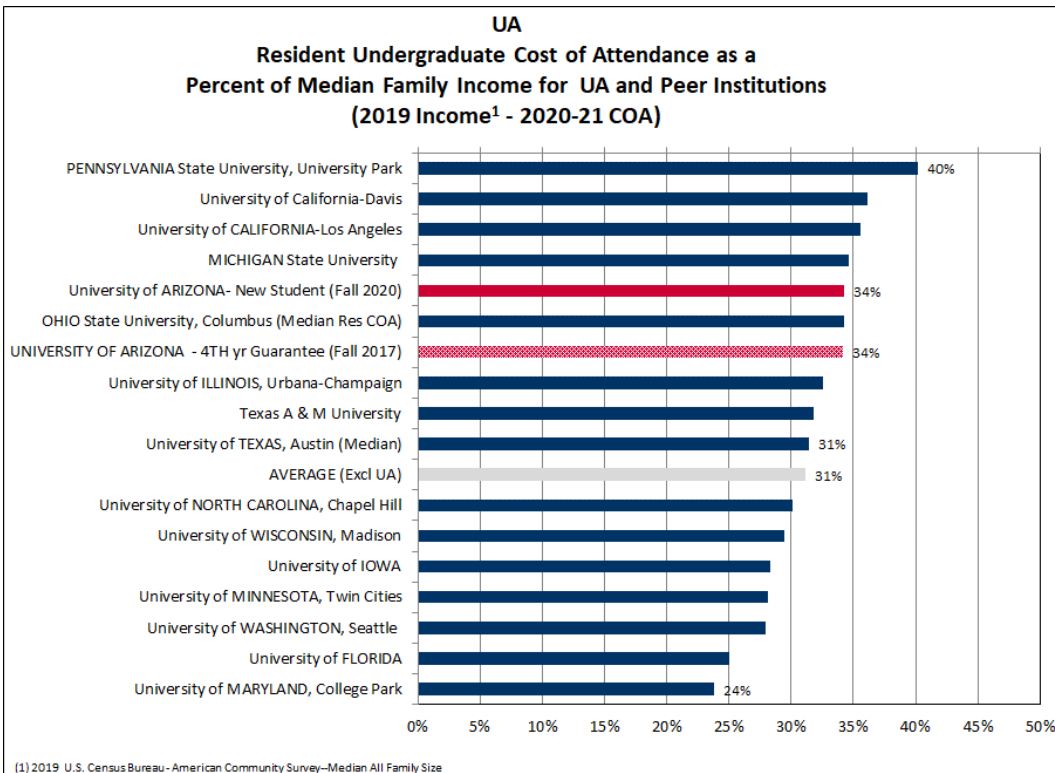
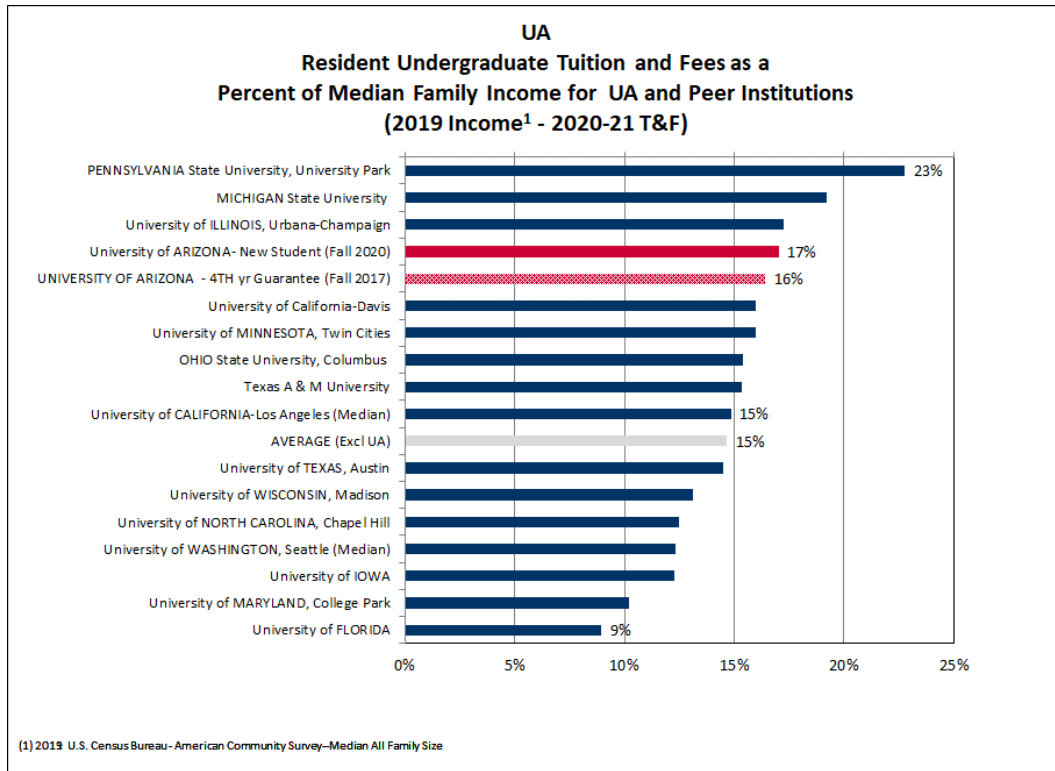
APPENDIX G



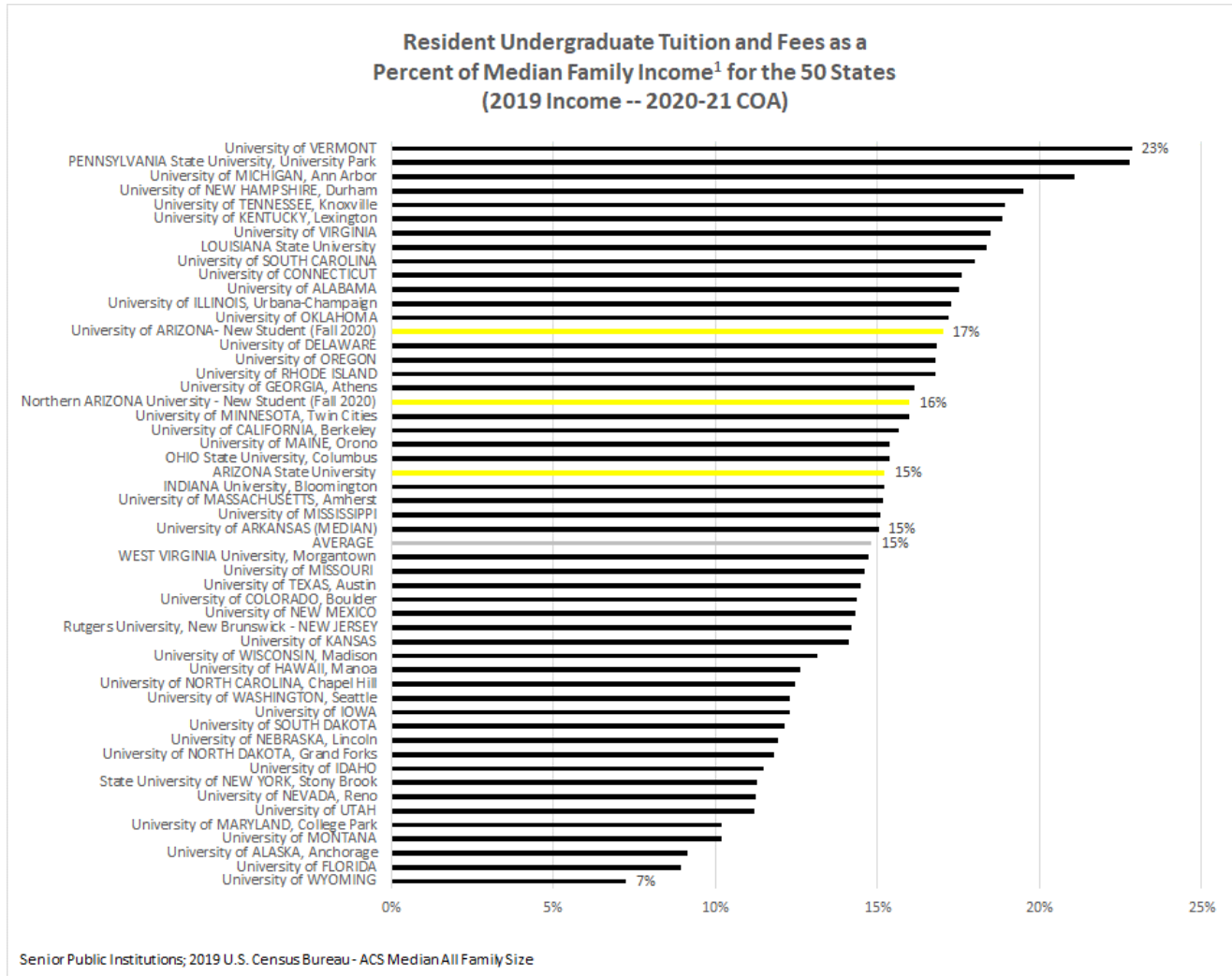
APPENDIX G



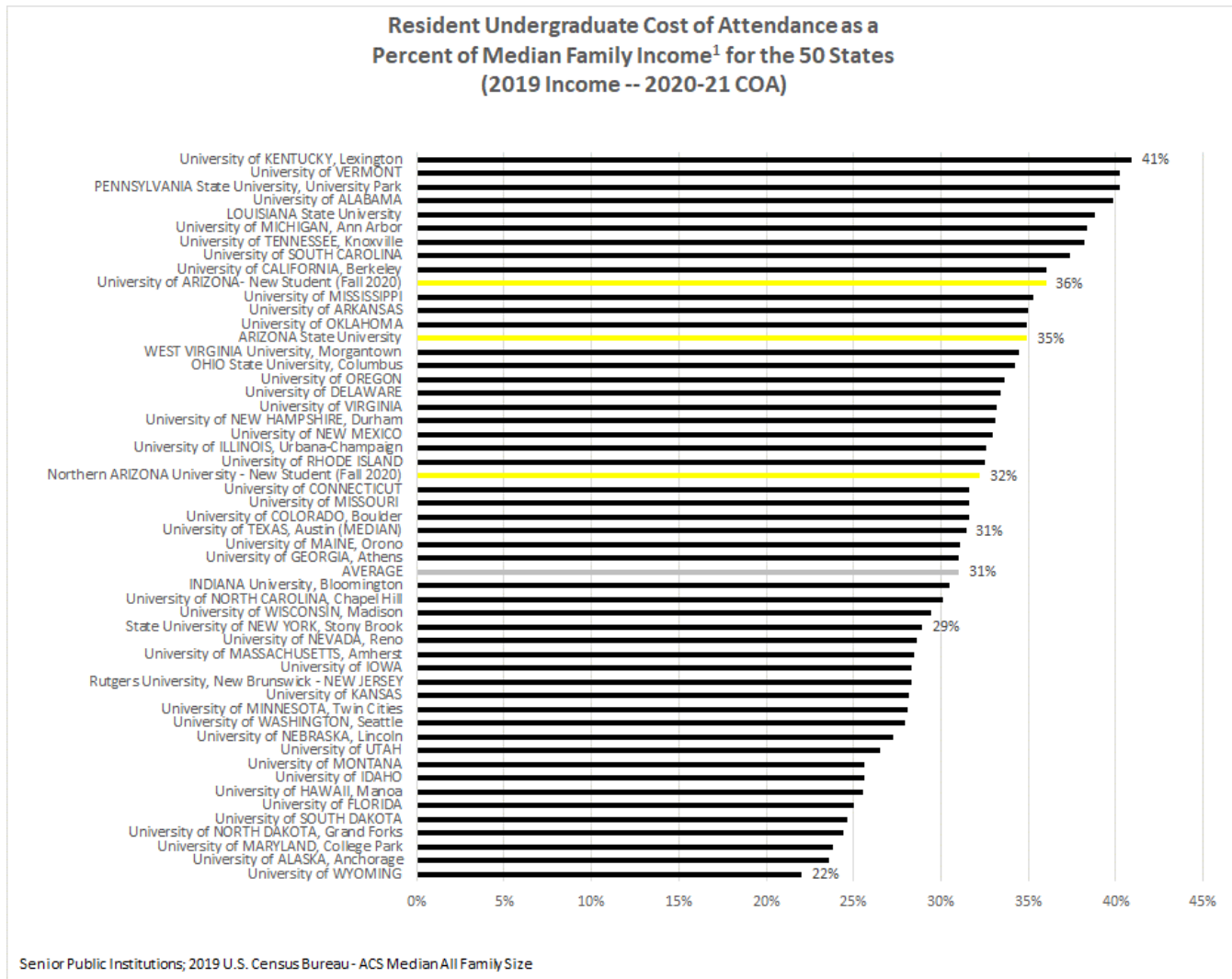
APPENDIX G



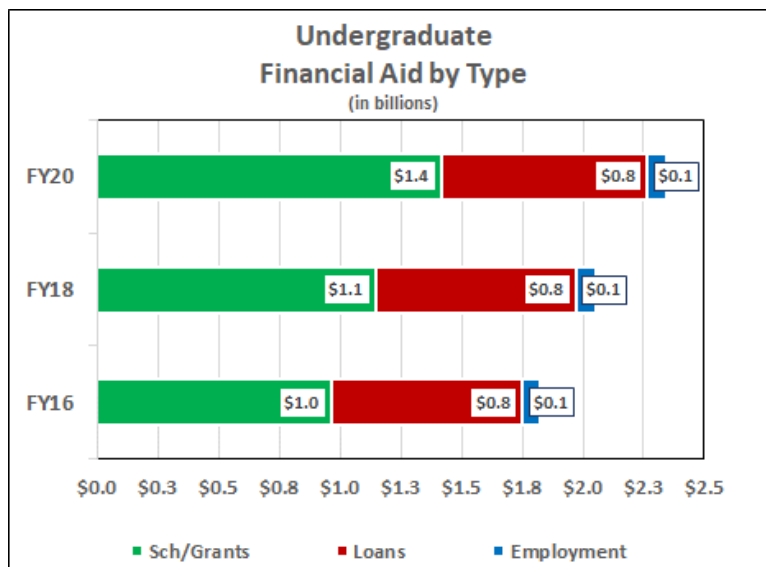
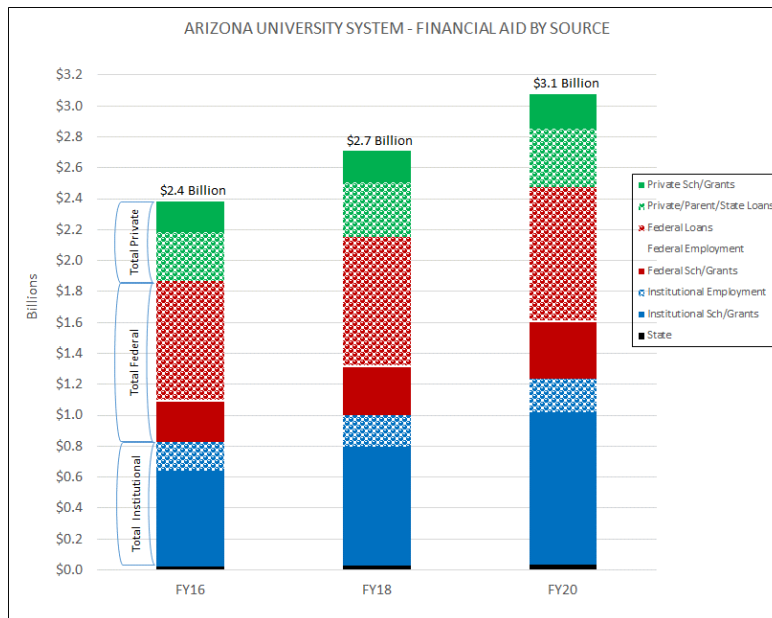
APPENDIX H



APPENDIX I



APPENDIX J

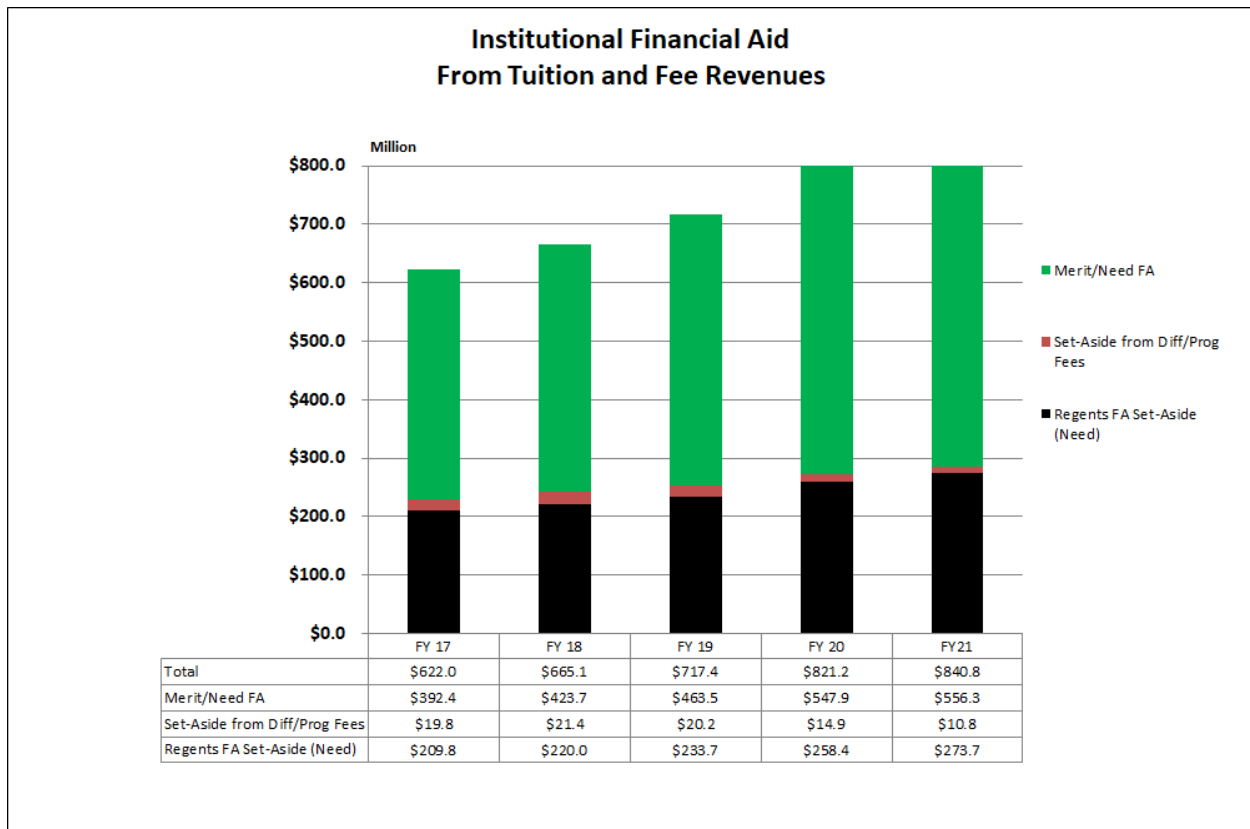


Financial aid is any form of assistance that assists a student with the costs of attending college. Gift aid is financial aid that does not have to be repaid, and is referred to by various headings such as scholarships, grants, tuition remission programs, or tuition waivers.

Where gift aid is essentially viewed as “free” money, self-help aid is money that comes with a cost. There are two types of self-help aid: loans and employment/work-study; both programs provide some kind of condition. The theory is that in fulfilling the condition, students are essentially helping themselves.

During 2019-20 financial aid provided to students totaled \$3.1 billion, an increase of approximately 29 percent since FY 2016. Undergraduate scholarships/grants experienced the largest growth between FY 2016 and FY 2020, which increased about 47 from \$965.5 million to \$1.42 billion. Undergraduate self-help (employment and loans) increased by about 8 percent from \$856.9 million in FY 2016 to \$926.0 million in FY 2020.

APPENDIX K



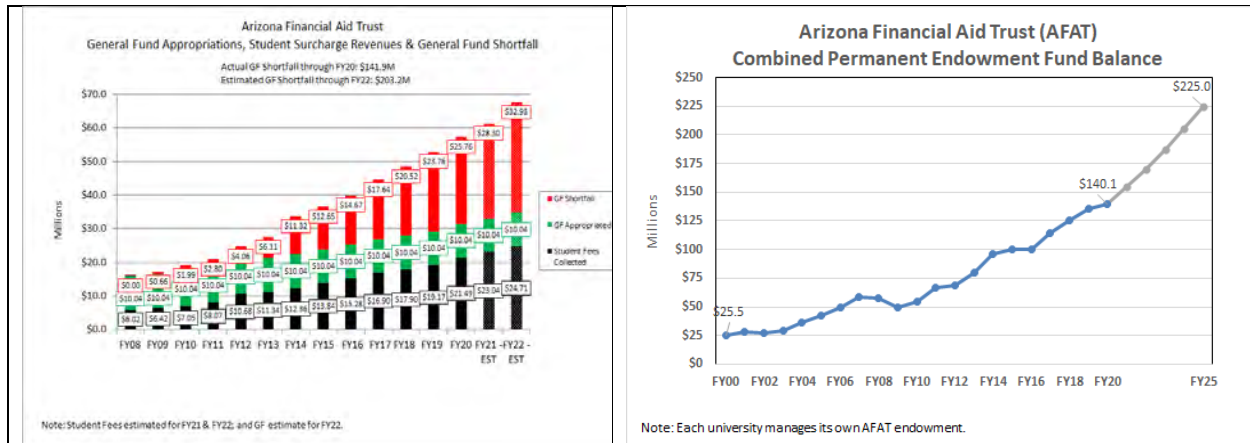
The universities retain millions of dollars from tuition and program fee revenues to support need-based financial aid, financial aid for top Arizona high school graduates and university undergraduate and graduate scholars.

In FY 2021, the university-approved budgets include retaining about 25 percent of tuition and program fee revenues for student financial aid - \$840.8 million, an increase of \$19.6 million (2.4%) above FY 2020.

A portion of financial aid retained from tuition revenues, identified as the *Regents Financial Aid Set-Aside (RSA)*, directs the universities to set aside at least 14 percent of specified tuition revenues for need-based aid, to help offset the impact of tuition increases. The set-aside amount is formula driven. As tuition revenues increase, the amount of the student financial aid set-aside increases.

Based on the president's recommendations for FY 2021-22, student financial aid is estimated to increase by approximately \$28.8 million or about 19 percent of the estimated incremental tuition and fee revenues.

APPENDIX L



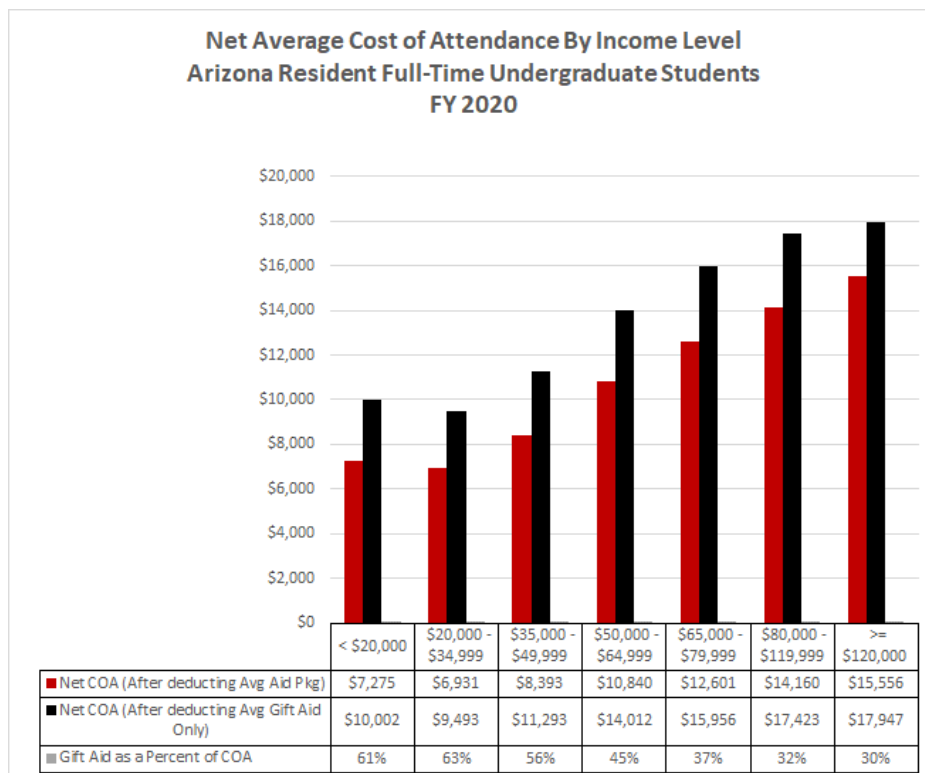
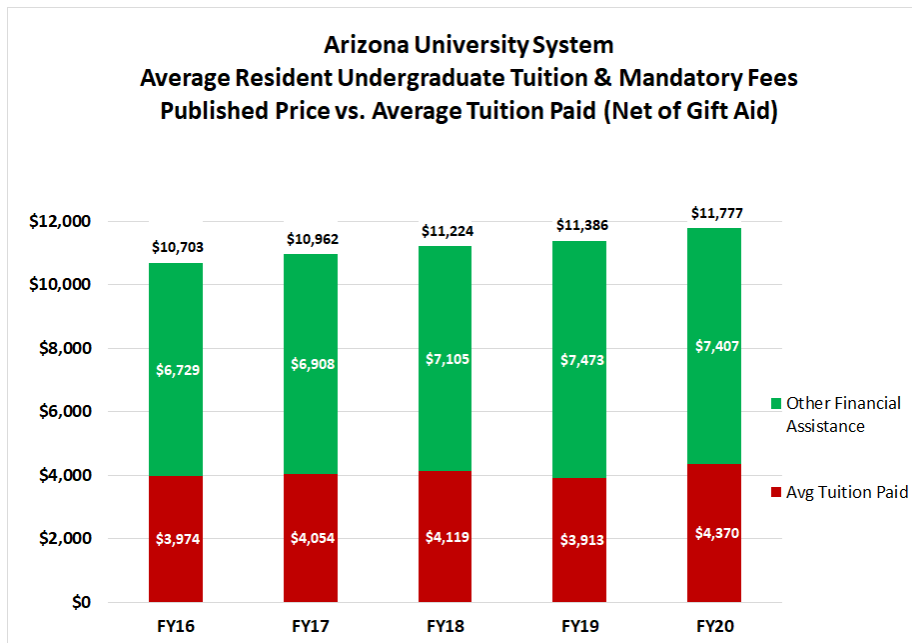
The Arizona Financial Aid Trust Fund (AFAT) provides immediate aid to students with financial need and creates an endowment for future aid. Each university manages its own fund. By FY 2025, the combined AFAT endowments held at each university are projected to reach about \$225 million.

There are three sources of revenue for the fund: funds appropriated by the legislature, a fee paid by students, and interest earned on the endowment. In 2007, legislation passed to increase student aid for AFAT. Seventy-five percent of the combined revenues are to be used for immediate aid (up from 50 percent), with the remaining 25 percent placed in the permanent endowment. In addition, the state match increased from a 1:1 to a 2:1 match of the student surcharge collected. However, FY 2008 was the only year that the state met its obligation to match the student surcharge at 2:1.

In FY 2020, the combined revenue into AFAT totaled \$32.1 million, of which \$10 million was from general fund appropriations and \$21.5 million from student fees and \$0.6 million from interest income and change in fair value. There were 9,892 awards given, averaging \$2,900.

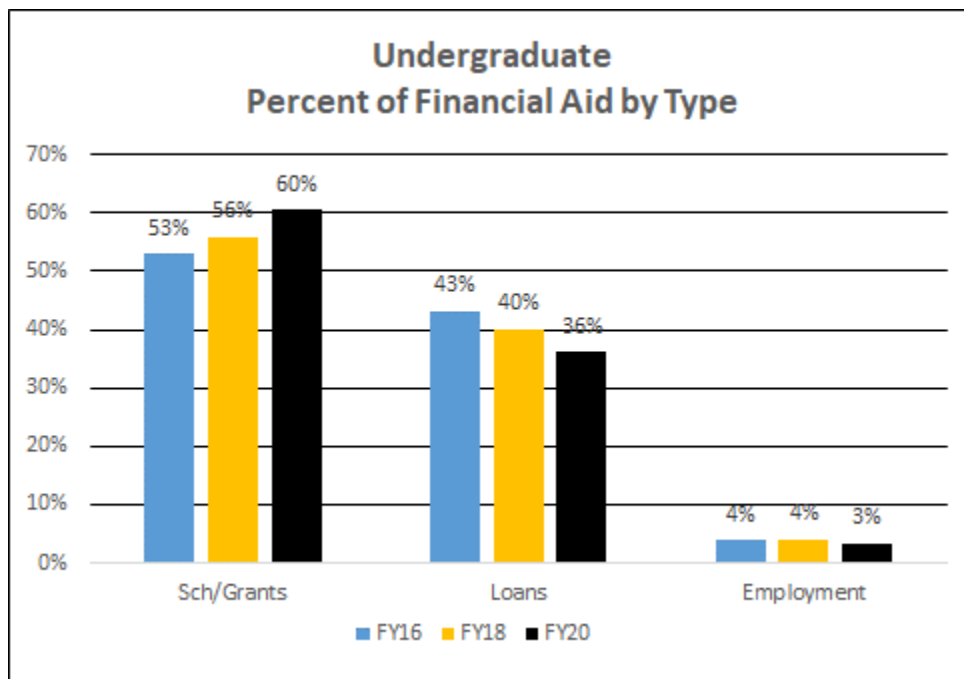
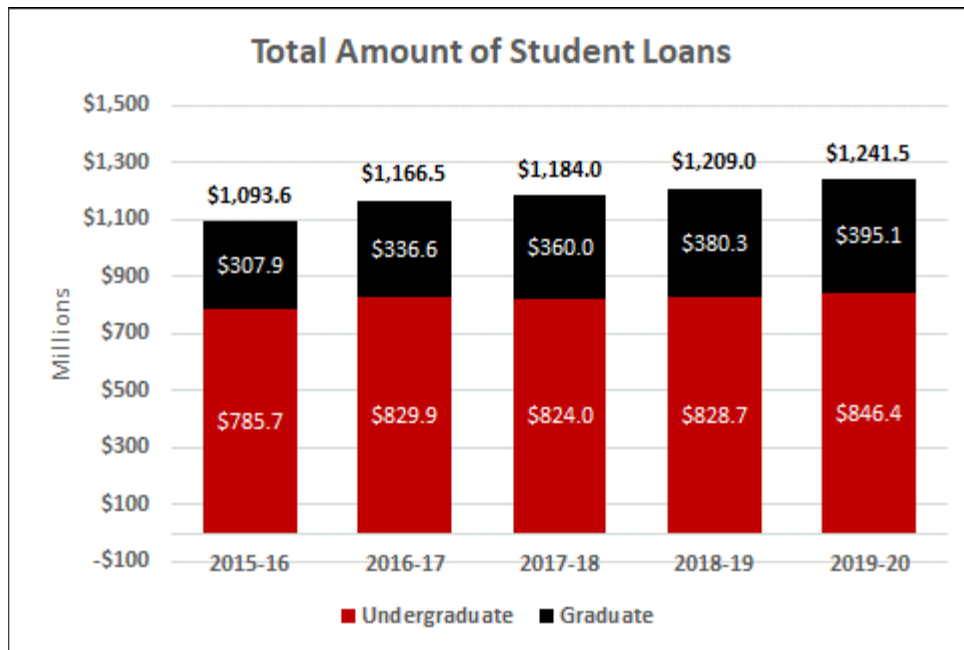
Arizona has only three state-supported financial aid programs: AFAT (\$10M), Arizona Teachers Academy (\$15M), and LEAP (Leveraging Educational Assistance Partnership--\$1.2M) administered by the Commission for Postsecondary Education. According to the most recent NASSGAP (National Association of State Student Grant & Aid Programs) Annual Survey on State Sponsored Financial Aid: Arizona ranks 35th for total grant aid awarded; 42nd for total state grant expenditures as a percentage of state fiscal support for higher education operating expenses; 46th for undergraduate grant dollars per undergraduate enrollment; and 47th for state grant dollars per state population.

APPENDIX M



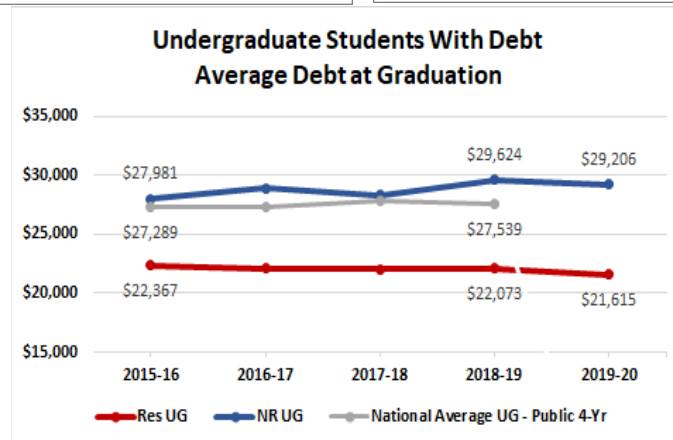
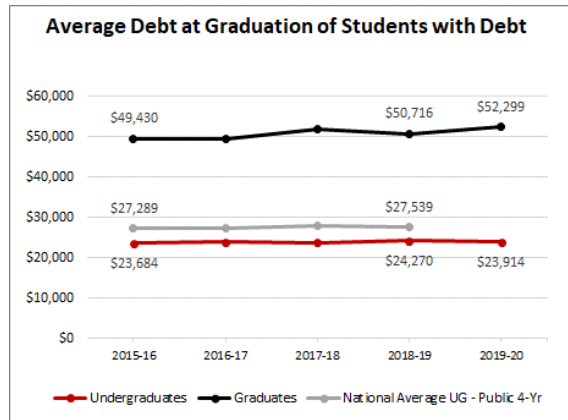
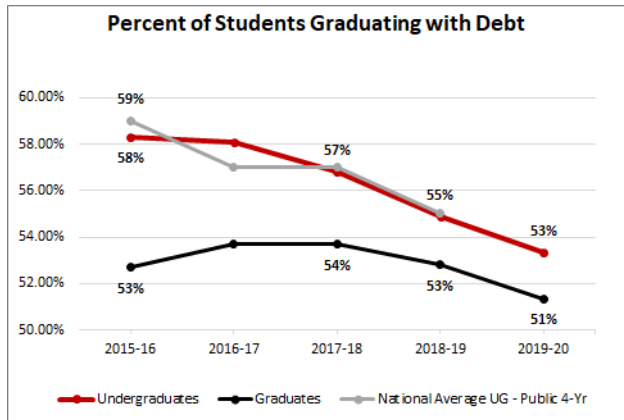
Between FY 2016 and FY 2020, students paid an average of 37 percent of the tuition and fee published price. In FY 2020, the average discount rate for the COA ranged from 61 percent for students whose family income was below \$20,000, to 30 percent for those students whose family income is above \$120,000.

APPENDIX N



Scholarship/Grants make up over half of the student financial aid awarded for undergraduate students, representing 60 percent of total aid in FY 2020. Although the total amount of loans has increased over the years, loans as a percent of total aid awarded has decreased, from 43 percent in FY 2016 to 36 percent in FY 2020.

APPENDIX O

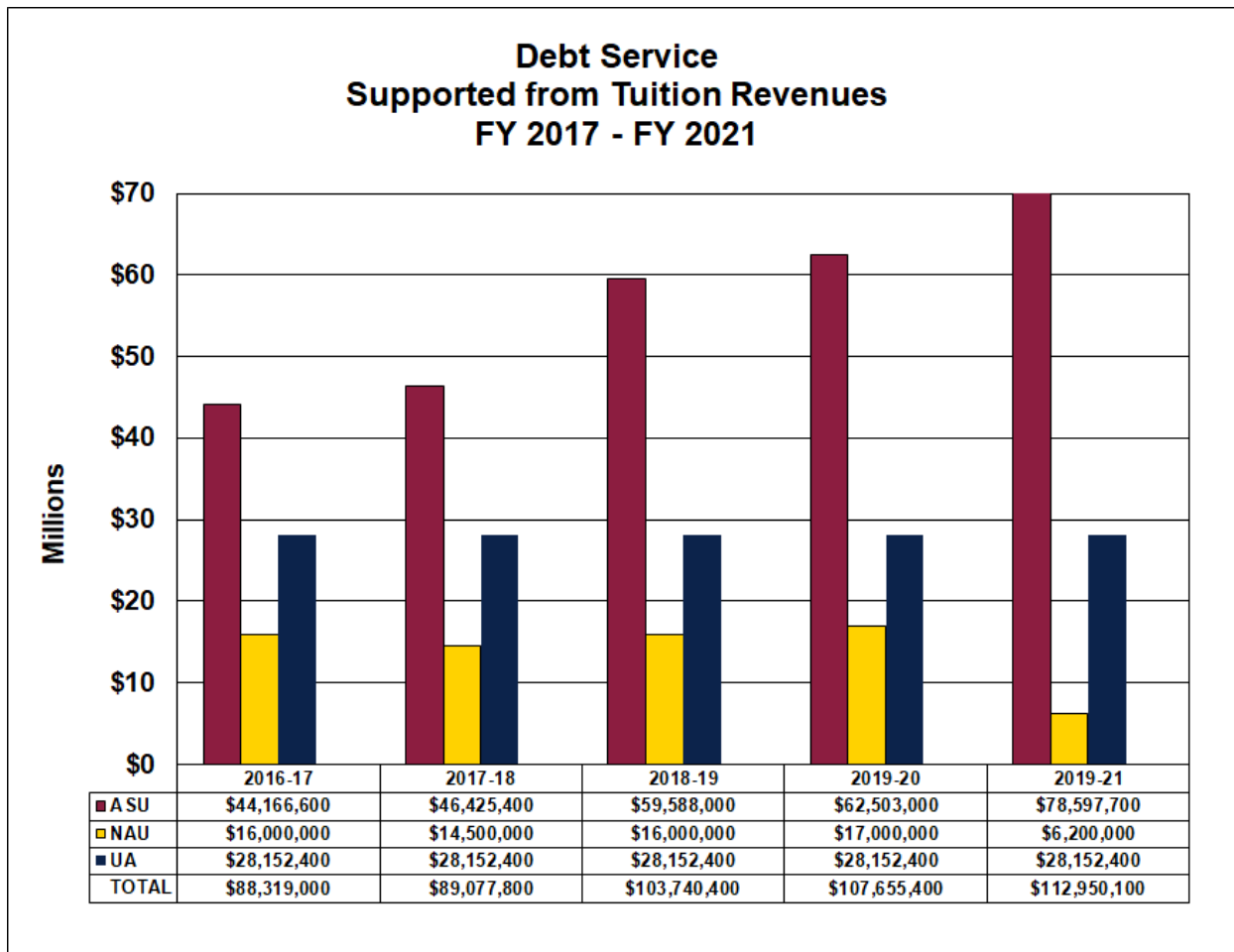


Between FY 2018 and FY 2019, nationally among four-year public institutions the percent of undergraduate students graduating with loan debt decreased slightly from 57 percent to 55 percent. Arizona universities followed a similar trend and decreasing further in FY 2020 to 53 percent.

In 2019-20, the average debt for Arizona’s undergraduate students who graduated with loans was \$23,914. Between 2015-16 and 2019-20, for Arizona’s resident undergraduate students, student debt decreased 3.4 percent from \$22,367 to \$21,615, while nonresident undergraduate student debt increased 4.4%.

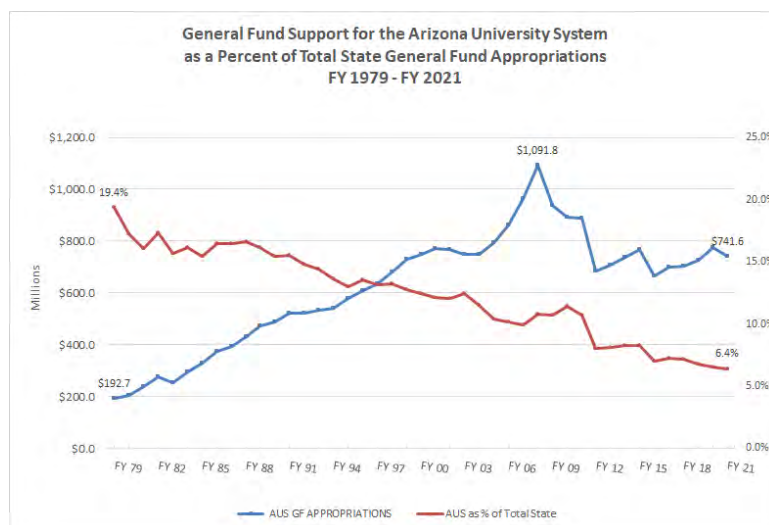
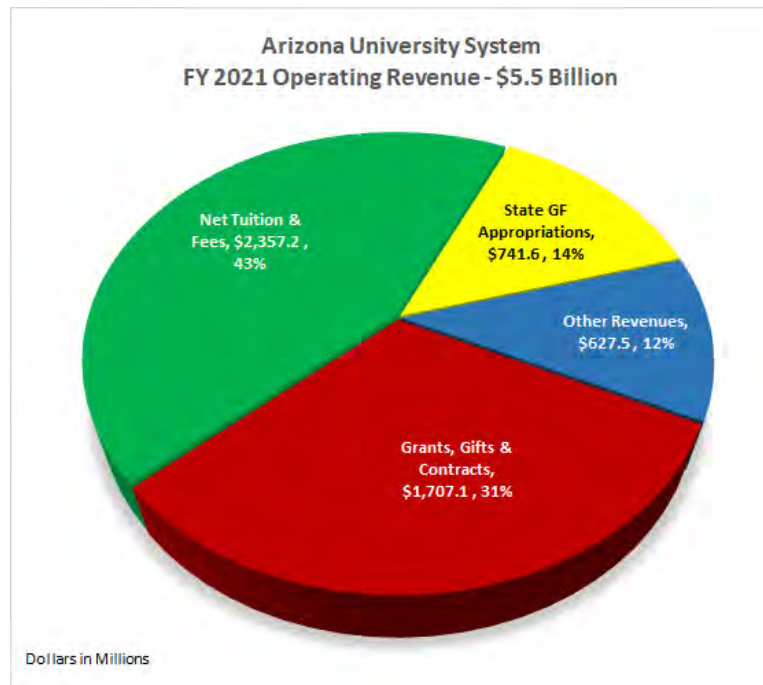
The average debt for Arizona’s graduate students with loans at graduation increased about 5.8 percent between FY 2016 and FY 2020.

APPENDIX P



University debt service paid from tuition revenues is one factor the board considers during the tuition setting process. The universities finance new academic buildings or renovations to existing building with tuition and other sources of revenue. The amount of debt paid with tuition revenues is approximately \$113 million in FY 2021, or about 3.3 percent of gross tuition and fee revenues.

APPENDIX Q



For FY 2021, state General Fund appropriations make up about 14% of total university operating revenues; Net tuition and fee revenues 43%; gifts, grants and contracts 31%, and other revenues 12%.

State general fund for the universities as a percent of total State general funds has been declining since 1979, when the Arizona University System received nearly 20 percent of the State's general fund. With declining state revenues and competing interests from other state supported entities, the universities' share of the state's general fund is now about 6.4 percent.

In 2008, state support for the Arizona university system totaled \$1.09 billion. In FY 2021, state support is now \$741.6 million, or \$350 million less (32%) than what it was at the end of FY 2008, and is approximately at the same level as it was 21 years ago, in FY 2000.

APPENDIX R

ARIZONA STATE UNIVERSITY - TUITION AND FEES REVENUE

(\$000)

	FY 18	FY19	FY20	FY21 EST	FY22 EST	Δ FY21/FY22	
Tuition - Immersion	1,005,368	1,053,521	1,131,995	1,109,077	1,130,687	21,610	2%
NR UG	445,791	472,205	496,099	488,571	488,579	8	0%
RES UG	390,010	397,652	438,449	441,482	442,982	1,500	0%
NR Grad	120,736	134,197	147,333	129,677	145,403	15,726	12%
RES Grad	48,831	49,467	50,114	49,347	53,723	4,376	9%
Tuition - Online	296,869	331,668	399,232	482,263	546,405	64,142	13%
NR UG	193,758	224,376	271,079	315,834	350,607	34,773	11%
RES UG	40,523	40,958	50,473	53,108	60,767	7,659	14%
NR Grad	46,644	50,674	59,801	84,412	99,986	15,574	18%
RES Grad	15,944	15,660	17,879	28,909	35,045	6,136	21%
Prog Fees/Diff Tuition	144,140	164,166	120,425	92,178	103,065	10,887	12%
UG	66,951	80,504	47,048	16,797	15,118	(1,679)	-10%
Grad	77,189	83,662	73,377	75,381	87,947	12,566	17%
College Fees	0	0	78,841	124,727	150,633	25,906	21%
UG			65,983	113,191	138,210	25,019	22%
Grad			12,858	11,536	12,423	887	8%
Course Fees	25,574	26,876	6,872	1,655	1,227	(428)	-26%
UG	24,435	25,680	6,282	203	219	16	8%
Grad	1,139	1,196	590	1,452	1,008	(444)	-31%
Extended Ed							
Summer & Winter Sessions	131,310	149,505	181,260	208,495	222,502	14,007	7%
Mandatory Fees	47,701	51,102	49,540	44,798	45,455	657	1%
UG	39,784	33,874	38,977	27,952	34,697	6,745	24%
Grad	7,917	17,228	10,563	16,846	10,758	(6,088)	-36%
Other Misc	46,403	48,768	45,146	50,253	52,101	1,848	4%
Total Tuition & Fees	1,697,365	1,825,606	2,013,311	2,113,446	2,252,075	138,629	7%
Yearly Change	7%	8%	10%	5%	7%		

APPENDIX R

NORTHERN ARIZONA UNIVERSITY - TUITION AND FEES REVENUE

(\$000)

	FY18	FY19	FY20	FY 21 EST	FY22 EST	Δ FY21/FY22	
TUITION	267,040	277,798	280,917	271,127	270,970	(157)	0%
NR UG	115,635	114,842	113,696	104,121	104,953	832	1%
RES UG	130,788	140,457	141,553	141,357	137,561	(3,796)	-3%
NR Grad	15,506	6,040	7,294	7,714	8,349	635	8%
RES Grad	5,110	16,459	18,374	17,935	20,107	2,172	12%
Online	32,922	33,618	35,126	35,961	33,048	(2,913)	-8%
NR UG	5,912	6,284	8,043	9,805	7,868	(1,937)	-20%
RES UG	18,051	17,387	15,908	13,630	12,292	(1,338)	-10%
NR Grad	2,576	2,929	3,308	3,668	3,864	196	5%
RES Grad	6,384	7,017	7,866	8,857	9,022	165	2%
Prog Fees	7,486	7,877	10,728	11,478	11,778	299	3%
UG	2,710	2,867	4,941	5,280	5,331	51	1%
Grad	4,776	5,010	5,786	6,198	6,446	248	4%
College Fee	0	0	0	0	0	-	-
UG						-	-
Grad			-			-	-
Course Fees	5,452	5,187	4,022	3,242	2,970	(272)	-8%
UG	5,355	5,094	3,949	3,183	2,911	(272)	-9%
Grad	97	93	73	59	59	-	0%
Ext Ed Fees	121	211	-	-	-	-	-
Summer & Winter Sessions	23,265	25,521	25,900	26,690	26,220	(470)	-2%
Mandatory Fees	24,131	27,797	28,737	28,191	27,652	(539)	-2%
UG	22,139	25,527	26,279	25,654	24,975	(679)	-3%
Grad	1,992	2,270	2,458	2,537	2,677	140	6%
Other Misc	4,389	4,322	4,178	2,718	3,800	1,082	40%
Total Tuition & Fees	364,805	382,331	389,609	379,408	376,437	(2,971)	-1%
Yearly Change	4%	5%	2%	-3%	-1%		

APPENDIX R

UNIVERSITY OF ARIZONA - TUITION AND FEES REVENUE
 (\$000)

	FY 18	FY 19	FY20	FY21 EST	FY22 EST	Δ FY21/FY22	
Fall/Spring Base Tuition	664,746	675,140	686,575	661,065	669,181	8,117	1.2%
NR UG	336,825	344,182	351,092	326,133	331,840	5,707	1.7%
RES UG	215,301	216,985	219,660	215,552	210,057	(5,495)	(2.5%)
NR Grad	57,239	57,894	60,323	61,747	66,456	4,709	7.6%
RES Grad	55,382	56,080	55,500	57,632	60,828	3,196	5.5%
Online	40,476	49,671	59,496	86,863	91,044	4,181	4.8%
NR UG	5,616	8,593	12,771	21,048	22,061	1,013	4.8%
RES UG	4,992	7,639	11,354	18,714	19,615	901	4.8%
NR Grad	15,114	16,921	17,899	23,835	24,982	1,147	4.8%
RES Grad	14,754	16,517	17,472	23,267	24,387	1,120	4.8%
Prog Fees/Diff	34,006	33,607	32,938	32,384	33,506	1,122	3.5%
UG	17,452	17,191	16,907	16,455	17,025	570	3.5%
Grad	16,554	16,416	16,031	15,929	16,481	552	3.5%
College Fee	0	-	0	0	0	0	-
UG				0	0	0	-
Grad			0	0	0	0	-
Course Fees	6,156	6,174	6,363	6,830	6,976	146	2.1%
UG	5,664	5,680	5,855	6,284	6,418	134	2.1%
Grad	493	494	509	546	558	12	2.1%
Ext Ed Fees	16,761	16,996	13,805	11,021	14,629	3,608	32.7%
Non Degree	4,499	4,217	5,137	5,617	5,541	(76)	(1.4%)
Summer Session	36,875	37,005	37,926	38,335	38,050	(285)	(0.7%)
Mandatory Fees	43,916	46,880	49,585	48,866	48,529	(337)	(0.7%)
UG	36,450	38,442	40,660	40,070	39,794	(276)	(0.7%)
Grad	7,466	8,438	8,925	8,796	8,735	(61)	(0.7%)
Other Misc	21,136	21,928	20,021	17,989	18,884	894	5.0%
Total Tuition & Fees	868,571	891,616	911,847	908,969	926,339	17,370	1.9%
Yearly Change	1.7%	2.7%	2.3%	1.9%	1.9%		

EXECUTIVE SUMMARY

Item Name: **Review of Multiple-year Employment Agreement for Women’s Basketball Head Coach (UArizona)**

Action Item

Requested Action: The University of Arizona (“UArizona”) asks the board to approve the Second Amended Multiple-year Employment Agreement for Women’s Basketball Head Coach Adia Barnes, as described in this executive summary.

Background

- UArizona seeks review and recommendation to forward to the board for approval a Second Amended Multiple-year Employment Agreement for Women’s Basketball Head Coach Adia Barnes (“Barnes”) through the period ending April 30, 2026.
- In October 2019, following board approval, UArizona entered into a First Amended Multiple-year Employment Agreement (“First Amended Agreement”) with Barnes with a base annual salary of \$407,500. Under the First Amended Agreement, Barnes also received annual and escalating retention bonuses. If she remained employed for the duration of the First Amended Agreement, the aggregate value of the retention bonuses was \$250,000.
- This is a proposed two-year extension of Barnes’ current contract based on athletic performance and coaching success. She was named the 2020 Naismith Coach of the Year Finalist and 2021 Naismith Coach of the Year Semifinalist. Barnes is the only coach in school history to win at least 20 games twice in her first four seasons. Additionally, Barnes finished second in Pac-12 Coach of the Year voting for the 2020-2021 season. The Women’s Basketball program has been consistently improving under Barnes’ leadership and is widely recognized as a program not just on the rise, but as a program that is already achieving success and poised to continue performing at the highest levels.
- The Women’s Basketball Team was selected as a 3rd seed in the Mercado Region of the 2021 NCAA Tournament – their first NCAA Tournament berth since 2005. The team was on track to make the tournament in 2020 and host the first two rounds before COVID-19 prompted the cancellation of last year’s tournament.

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EXECUTIVE SUMMARY

- Other notable achievements under Barnes include:
 - Back-to-back top-four finishes in the Pac-12 for the first time since 2004, thirteen Pac-12 wins this year (the most since 2004), and second place finish in 2021, the best finish since 2004 (co-Pac-10 champs in 2004).
 - Ranked in the Associated Press poll for 33-straight weeks, the longest stretch in school history, and ranked in the top 10 in 13 of the 16 Associated Press polls this season, tying the 1998 school record for most weeks spent in the top 10.
 - Finished second in the Pac-12 in attendance in the 2019-20 season.
 - Won the 2019 WNIT after winning just six games in the previous season. And in winning the WNIT, UArizona broke program and Pac-12 attendance records with a sellout crowd of 14,644 for the championship game victory over Northwestern.
- Based on due diligence, UArizona is not aware of any issues negatively affecting Barnes' employability, including but not limited to NCAA violations, claims or litigation related to her prior employment as an assistant coach, allegations of wrongdoing, or significant press controversies.

Discussion

Contract Duties, Length, and Compensation/Salary Adjustments

- The proposed Second Amended Multiple-year Employment Agreement term will be five years, ending on April 30, 2026. Barnes' current contract is through April 30, 2024.
- Barnes' programs duties will be those customarily associated with the head coach of a Division I women's basketball program. These include, among other responsibilities, overseeing all aspects of the program, supervising the coaches and other employees, and coaching the student-athletes, athletically and academically, all in accordance with applicable UArizona, ABOR, Pac-12, and NCAA policies, rules, and regulations.
- Barnes' proposed amended base annual salary for 2021-2022 will be \$580,000, and will increase incrementally over the five-year term as follows:
 - Year 2 - \$620,000
 - Year 3 - \$650,000
 - Year 4 - \$725,000
 - Year 5 - \$770,000

EXECUTIVE SUMMARY

- The escalating retention bonuses in the current contract are eliminated in the Second Amended Multiple-year Employment Agreement.
- Barnes' salary will be paid entirely from revenue generated by the Athletics Department. No part of her salary will be paid from appropriated funds or donor contributions.
- The Second Amended Multiple-year Employment Agreement will be largely identical to the 2019 contract approved by the board, subject to the few changes indicated in this Executive Summary, as well as updated language regarding NCAA compliance, Title IX responsibilities, and termination for cause.

Annual Performance Incentives

- The Second Amended Multiple-year Employment Agreement does not modify the existing annual performance incentive criteria or incentive payment amounts that were approved by the board in late 2019, and Barnes will continue to be eligible to earn annual performance incentives as set forth below.
- The Second Amended Multiple-year Employment Agreement will require the return of incentives paid for performance if credit for games or championships are vacated, diminished, or otherwise "lost" due to NCAA infractions or violations of other binding rules or other penalties, whether self-imposed by UArizona or imposed by the conference or the NCAA.
- Academic performance incentive payments are for the highest-ranked achievement in each category and are not cumulative to any lower-ranked achievements, unless otherwise indicated. Payments in each athletic performance incentive (conference and NCAA) category are cumulative, unless otherwise noted. If Barnes were to earn the maximum performance incentive payments allowed, she would receive annual incentive payments of no more than \$305,000 (\$60,000 and \$245,000 for academic and athletic performance achievements, respectively).

I. Academic Performance Incentives

MYAPR

Barnes may receive one-time compensation on an annual basis for the following Multi-year Academic Progress Rate (MYAPR) team achievements (Women's Basketball MYAPR for 2019-2020 was 996):

EXECUTIVE SUMMARY

<u>MYAPR</u>	<u>BONUS</u>
971 or above (no rounding) *	\$10,000
1000 (no rounding)	\$15,000

* MYAPR bonus methodology: This threshold was derived by averaging the UArizona MYAPR for all sports with the MYAPR of all NCAA FBS teams.

CGPA

Barnes may receive additional one-time compensation on an annual basis for the following team Cumulative Grade Point Average (CGPA) achievements (Women’s Basketball CGPA for 2019-2020 was 3.207):

<u>CGPA</u>	<u>BONUS</u>
3.00 – 3.29 (no rounding)	\$15,000
3.30 – 3.68 (no rounding)	\$30,000
3.69 or above	\$45,000

II. Athletic Performance Incentives

Barnes may receive additional one-time compensation on an annual basis for the following athletic performance team achievements in a given year:

- Pac-12 Conference Regular Season Champion \$20,000
- Pac-12 Conference Tournament Champion \$10,000
- NCAA Tournament
 - National Champion \$50,000
 - Final Four Appearance \$40,000
 - Elite Eight Appearance \$30,000
 - Sweet Sixteen Appearance \$25,000
 - Round of 32 Appearance \$20,000
 - NCAA Tournament Appearance \$10,000
- Final AP or ESPN/USA Today Ranking (highest amount only)

EXECUTIVE SUMMARY

Within the Top Ten 11 th through 15 th	\$10,000 \$5,000
<ul style="list-style-type: none"> • Regular Season Victories (excludes exhibition games) <ul style="list-style-type: none"> 25 or more 20 to 24 	
	\$10,000 \$5,000
<ul style="list-style-type: none"> • Coach of the Year (highest amount only) <ul style="list-style-type: none"> • Recognition as Pac-12 Coach of the Year OR National Coach of the Year by one of AP, WCBA, or Naismith • Recognition as Pac-12 Coach of the Year AND National Coach of the Year by one of AP, WCBA, or Naismith OR National Coach of the Year as voted by more than one of AP, WCBA, or Naismith 	
	\$10,000 \$15,000

Other Provisions

- Barnes will receive all employee-related benefits normally available to UArizona employees. She will receive additional benefits as well, including tickets to UArizona sporting events, use of one automobile or a stipend, and an opportunity to have guests at post-season women’s basketball tournament appearances with prior Athletic Director approval.

- Barnes will have the right to operate private youth basketball camps and clinics on the campus of the UArizona, subject to a separate agreement between UArizona and Barnes for the use of UArizona facilities and/or marks. Barnes will own all rights to the camps and will be responsible for all aspects of the camps, including payment and expenses/liabilities of the camps.

- Barnes may enter into personal service agreements with other parties to provide services not reserved to the UArizona within the contract, subject to UArizona approvals and compliance with applicable UArizona, NCAA, Pac-12, and ABOR policies. Currently, Barnes has or will enter into contracts with Learfield IMG (or its parent or affiliate company) and Nike, Inc.

EXECUTIVE SUMMARY

- To the extent required by NCAA and Pac-12 Conference regulations or UArizona policy, Barnes must disclose all athletics-related outside income to the Athletic Director, UArizona, and the board annually.
- During the duration of the Second Amended Multiple-year Employment Agreement and for a period of one year after expiration or termination of the Agreement for any reason, Barnes will be subject to a covenant not to compete that prevents her from accepting employment as a head coach, assistant coach, or analyst with any Pac-12 institution.
- The Second Amended Multiple-year Employment Agreement may be terminated for cause, in which case UArizona will be liable only for Barnes' salary and incentive payments earned as of the date of termination. Bases for termination for cause will include provisions relating to inability to perform job duties; dishonesty; substantial neglect of program duties or personal conduct that impairs the ability to serve as head coach; failure to cooperate in investigations; provisions relating to violations of certain laws, NCAA and Conference rules and regulations, and ABOR and UArizona policies and rules; and provisions relating to the failure to maintain high levels of integrity, honesty, moral character, professionalism, and dedication to UArizona and its student athletes.
- Additionally, if Barnes violates NCAA or Pac-12 Conference regulations, she will be required to pay UArizona \$100,000 as liquidated damages and would be required to return sums earned as athletic performance incentives for any victories or championships forfeited or vacated due to such violations.
- If UArizona terminates the Second Amended Multiple-year Employment Agreement without cause, UArizona will pay Barnes liquidated damages for each year or portion (pro rata) remaining in the Agreement, calculated as follows: sixty percent (60%) of Barnes' salary plus that percentage of her salary designated as Employee Related Expenses (as published by UArizona's Financial Services Office) as of the date of termination, plus the value, as assigned by UArizona in its sole discretion, of the automobile provided to Barnes during the term. As with her previous contract approved by the board, in light of the 60% damages calculation above, Barnes will not be obligated to mitigate her loss of income or to offset the amounts paid to her by UArizona if she becomes re-employed during the time when the Agreement would still have been in effect.
- The Second Amended Multiple-year Employment Agreement may be terminated by Barnes without cause. In that event, Barnes will pay to UArizona liquidated damages based on the time remaining in the Agreement, calculated as follows: \$1,000,000 if terminated in Year 1; \$700,000 if terminated in Year 2; \$300,000 if terminated in Year 3; \$100,000 if terminated in Year 4; \$0 if terminated in Year 5.

EXECUTIVE SUMMARY

- The Agreement will set out Barnes' various compliance obligations, including her obligation to promptly disclose potential NCAA or Pac-12 rules violations, her obligation to comply with NCAA, Pac-12, ABOR, and UArizona rules, regulations, and policies, and her duties under Title IX.

Committee Review and Recommendation

The Finance, Capital and Resources Committee reviewed this item at its April 1, 2021 meeting and recommended forwarding to the full board for approval.

Statutory/Policy Requirements

- ABOR Policy 6-910 requires board approval of multiple-year employment contracts for head basketball coaches.
- ABOR Policy 6-1001 provides the requirements for multiple-year appointments of head coaches.

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EXECUTIVE SUMMARY

Item Name: Election of Officers

Action Item

Requested Action: The board office asks the board to elect officers for one-year terms beginning July 1, 2021, as set forth below.

Background/History of Previous Board Action

The bylaws of the board provide the following with respect to the election of officers:

- At a meeting of the board at least 30 days prior to June 30, the board will elect a Chair, Chair Elect, Secretary and Treasurer for the upcoming fiscal year beginning July 1. Each officer holds office for twelve months and until a successor is duly elected. (Article VI)
- Pursuant to the bylaws, the immediate past Chair serves as the Treasurer. The Student Regent serves as the Assistant Treasurer. (Article VI)
- It is anticipated the following individuals will be nominated for Board offices:

Chair:	Lyndel Manson
Chair-Elect:	Fred DuVal
Secretary:	Kate King
Treasurer	Larry Penley
Assistant Treasurer:	Nikhil Dave

Statutory/Policy Requirements

Arizona Board of Regents Bylaws Article VI.

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PLACEHOLDER – ITEM 4

This item will be provided separately.

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EXECUTIVE SUMMARY

Item Name: **Appointment of Regents' Professors for Northern Arizona University**

Action Item

Requested Action: Northern Arizona University asks the board to approve the appointment of seven Regents' Professors effective July 1, 2021: Scott Goetz (School of Informatics, Computing and Cyber Systems), Jani Ingram (Department of Chemistry and Biochemistry), Bjorn Krondorfer (Department of Comparative Cultural Studies), Yiqi Luo (Department of Biological Sciences), Michelle Mack (Department of Biological Sciences), Edward Schuur (Department of Biological Sciences), Miguel Yacamán (Department of Applied Physics and Materials Sciences)

Background/History of Previous Board Action

- ABOR Policy 6-208 permits the rank of Regents' Professor to be awarded only to full professors with exceptional achievements which have brought them national or international distinction. This highest of faculty ranks may be awarded to no more than three percent of the total tenured and tenure-track faculty members.
- Northern Arizona University requires all nominations for Regents' Professor to come from tenured faculty members. Nominations are submitted to a nominating committee for the evaluation of nominations. The President considers the review from the committee and decides which names should go forward for the Board's consideration.
- On this occasion, seven names are recommended by President Cheng.

Discussion

Scott Goetz, PhD

Professor Goetz is a member of the School of Informatics, Computing and Cyber Systems and the Center for Ecosystem Science and Society (EcoSS). Dr. Goetz has an international reputation as a distinguished scholar in environmental remote sensing and its applications to global climate change research. His accomplishments include leading NASA's \$100M, 10-year Arctic Boreal Vulnerability Experiment (ABOVE), which supported participation of 781 scientists and stakeholders for interdisciplinary research on climate-ecosystem interactions. He is the Deputy Principal Investigator for Science for NASA's \$94M Global Ecosystem Dynamics Investigation (GEDI) project, which sent a high-resolution laser system to the International Space Station to better understand earth deforestation, forest and water resource management, carbon cycle science, and

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weather prediction. He is mentoring our next generation of NAU students to participate in this world-class research.

Jani Ingram, PhD

Professor Ingram is a member of the Department of Chemistry and Biochemistry. She is also the NAU lead principal investigator for the NIH-funded Partnership for Native American Cancer Prevention, which is a collaboration between NAU and the Arizona Cancer Center that dates back to 2002. She has built a national and international reputation in community-engaged research with indigenous communities, with expertise in the environmental impacts of uranium mining on Navajo Nation. Dr. Ingram has the exceptional accomplishment of mentoring 131 students in her research lab, many of whom are Indigenous. This achievement was recently recognized through the American Chemical Society's Award for Encouraging Disadvantaged Students into Careers in the Chemical Sciences.

Bjorn Krondorfer, PhD

Professor Krondorfer is the Endowed Professor of Religious Studies in the Department of Comparative Cultural Studies, and the Director of the Martin-Springer Institute. Has developed a world-wide influence through his work in Holocaust and Genocide Studies, Critical Men's Studies, and Memory Studies, and has applied his scholarship to current conflicts such as the treatment of refugees, mass violence, and genocide, as well as to peace-building work and issues of social justice and change. He has a reputation for fostering deep student engagement and empathy through his teaching on topics that lead to an enhanced understanding of moral courage, tolerance, reconciliation, and justice.

Yiqi Luo, PhD

Professor Luo is a member of the Department of Biological Sciences and the Center for Ecosystem Science and Society (EcoSS). Dr. Luo is a prolific and highly respected, internationally known scientist with expertise in ecology and large-scale quantitative modeling, with a focus on global environmental change. He has published over 461 peer-reviewed publications, and has been cited more than almost 45,000 times. He is a Fellow of the American Geophysical Union, and the American Association for the Advancement of Science (AAAS). He is also a dedicated teacher who has authored two textbooks, and recently converted a carbon cycle modeling course to a virtual format that attracted students from 6 continents.

Michelle Mack, PhD

Professor Mack is a member of the Department of Biological Sciences and the Center for Ecosystem Science and Society (EcoSS). Dr. Mack is a globally distinguished leader in the field of ecosystem ecology, with expertise in carbon and nitrogen cycle dynamics of fire and thawing in boreal and tundra landscapes in the Arctic. She has multiple highly cited publications in *Science* and *Nature*, and she was selected as a Kavli Frontiers of Science Fellow by the National Academy of Sciences, and is a Fellow of the

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Ecological Society of America. Dr. Mack is a committed teacher and mentor to undergraduate and graduate students, and has launched many successful student careers in academia, as well as government and management agencies.

Edward (Ted) Schuur, PhD

Professor Schuur is a member of the Department of Biological Sciences and the Center for Ecosystem Science and Society (EcoSS). He has provided international scientific leadership through development of the Arctic Carbon and Climate (ACCLIMATE) observatory in Alaska and the Permafrost Carbon Network that has contributed a unified and collaborative scientific framework for how to consider threats emanating from release of permafrost carbon under rapid climate change. He has multiple highly cited publications in *Science* and *Nature*, and he is an American Geophysical Union Fellow, and a Leopold Leadership Fellow in the Stanford Woods Institute of the Environment. He teaches classes that explain the links between ecosystems and the Earth system, and is a lead author on a textbook on *Radiocarbon and Climate Change*.

Miguel José Yacamán, PhD

Professor Yacamán is a member of the Department of Applied Physics and Materials Sciences and a member of the Center for Materials Interfaces in Research and Applications (¡MIRA!). Dr. Yacamán is an internationally recognized scholar in the areas of Nanomaterials and Electron Microscopy. He has published over 465 peer-reviewed publications, and has been cited more almost 34,000 times, and still takes time to teach 100-level Physics classes. Dr. Yacamán has received numerous honors, including being elected a Fellow of the Materials Research Society, the American Vacuum Society, the American Association for the Advancement of Science (AAAS), the Microscopy Society of America, and the American Physical Society. He was recognized by the Metals and Materials Society as the Robert Franklin Mehl Awardee and Distinguished Lecturer, and was named a Distinguished Scientist for the Society for the Advance of the Chicanos/Hispanics and Native Americans in Science (SACNAS). He also received the Mexico National Prize of Sciences, which is equivalent to the Medal of Science in the United States.

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EXECUTIVE SUMMARY

Item Name: **Appointment of Regents Professors for the University of Arizona**

 Action Item

Requested Action: The University of Arizona asks the board to approve the appointment of six Regents Professors: Steven Archer (Natural Resources & the Environment); Sonia Colina (Spanish & Portuguese); Marwan Krunz (Electrical & Computer Engineering); Dante Lauretta (Planetary Sciences/Lunar & Planetary Laboratory); Sallie Marston (Geography & Development); and Ian Pepper (Environmental Science).

Background/History of Previous Board Action

The University of Arizona requires all nominations for Regents Professor to come from groups of tenured faculty members and to be reviewed by an Advisory Committee. After this process, the president considers the recommendations provided from the committee and decides which names should be submitted for the board's consideration.

Discussion

On this occasion, six names are recommended. Each individual has the full support of the Advisory Board and the president.

Steven Archer (College of Agriculture & Life Sciences)

Professor Archer's research has concentrated on interactions between grasses and woody plants in relation to soils, climate, and land use through a broadly-based research program using remote sensing, geographic information system (GIS) mapping technology, dendrochronology, and stable-isotope chemistry. The results have enabled him to reconstruct vegetation history and to quantify and predict the consequences on sustainability of grazing systems, ecosystem biogeochemistry, and land surface-atmosphere interactions.

Professor Archer's research has substantively advanced our ecological understanding of grass-woody plant dynamics and underpin the secondary succession paradigm of cover and land use in drylands. Professor Archer's accomplishments have been recognized by the Chapline Research Award of the International Society for Range Management (2019); Fellowship in the Ecological Society of America (2016); and Fellowship in the American Association for the Advancement of Science (2009).

An additional strength of Professor Archer is his unique ability to translate his research in rangeland management to university extension agents so that they can then transmit

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the information to ranchers, conservationists and the general public. This is an important contribution to the Land Grant Mission of the University of Arizona. Professor Archer served as the lead author of the Arid Lands Section of the U.S. National Climate Change Science Synthesis/Assessment Product 4.3.

Sonia Colina (College of Humanities)

Professor Sonia Colina, a linguist in the Department of Spanish and Portuguese in the College of Humanities and the director of the National Center for Interpretation, has amassed an exemplary record of internationally recognized, groundbreaking, interdisciplinary scholarship. She is a “twin hitter” scholar. She is an expert in two fields, theoretical phonology and translation studies. Her work in the latter has scholarly and literary implications. It extends outward into medical and social services and social justice, which is of paramount importance at our Hispanic Serving Institution and in Pima County, where Hispanics make up 37.6% of the population.

Professor Colina’s single-authored 2009 book, *Spanish Phonology: A Syllabic Perspective*, is considered the most significant contribution to the discipline in the 21st century, serving as an “enduring source of reference” for scholars and students alike.

Dr. Colina’s research has had a significant impact on the health sciences and other sciences, including audiology. She has affiliate status in the Department of Speech, Language and Hearing Sciences in the College of Science and was the co-PI or collaborator on numerous national and international research grants, including the \$1.9 million grant entitled “Reducing Disparities in Access to Hearing Healthcare on the U.S.-Mexico Border” from the National Institute on Deafness and Other Communication Disorders of the NIH. She served as co- investigator for the \$1.4 million grant “Data-driven Text Simplification for Health Information” from NIH to the Department of Management and Information Systems in Eller College, which also resulted in several multi-author publications and a computer application. In 2008, with support from the Robert Wood Johnson Foundation, she designed a research-informed evaluation tool to assess the quality of translations produced in the healthcare field. In recognition of her work, she was awarded the 2009 National Hispanic Medical Association’s National Leadership Award.

Professor Colina’s work and recognition extend far beyond academic circles. She has served as an academic advisor for the Robert Wood Johnson Foundation, the National Weather Service, and the National Medical Spanish Taskforce, and as an expert advisor and scientific committee member for the Research Institute of U.S. Spanish.

Marwan Krunz (College of Engineering)

Professor Marwan Krunz’s research was pivotal for providing guarantees of quality of service for Internet-streamed video. He broke new ground with a concept known as statistical multiplexing, which resulted in the ability to stream hundreds of different video-based media from the same server to thousands of Internet users. To determine

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the effective bandwidth and storage requirements per stream, Professor Krunz provided one of the most accurate statistical models for compressed video in use today. Without his innovations, services such as Zoom, Netflix and others would not be effective.

His accomplishments extend to wireless communications, where his theoretical models serve as the basis for the design of wireless systems, with far-reaching impacts on technologies such as Wi-Fi, LTE/5G cellular systems, Internet of Things systems, and smart vehicular

communications. His contributions to wireless technologies have had far-reaching societal impacts in bridging the digital divide between urban and rural communities. For instance, his latest effort toward developing a smart 5G wireless repeater (a device prototyped by two startup companies that licensed the technology from the University) will extend 5G coverage to rural and sparse communities, including tribal nations in Arizona.

Professor Krunz's professional service and extramural activities are no less impressive than his research. He has chaired top-tier conferences and served on major editorial boards. He is a frequent keynote speaker around the globe. In recognition of his service, the IEEE Communications Society awarded him the 2012 Outstanding Service Award. His dedication to the University's mission is extraordinary, as evidenced by his significant service on many committees at the department, college, and university levels. Marwan Krunz brought and continues to bring high visibility to the University by directing two industry-focused research centers over the past 13 years.

Dante Lauretta (College of Science)

As Principal Investigator of the OSIRIS-REx mission to collect and return material from the asteroid Bennu, Professor Dante Lauretta has been prominent in the news. OSIRIS-REx is not only the largest sponsored project ever conducted at the University of Arizona, but it also will yield fundamental knowledge about the origin of the terrestrial planets. Leadership of this project alone would qualify Lauretta to be promoted to Regents Professor. However, he has done much more.

In 2002, very early in his career, Lauretta was awarded the Alfred O. Nier Prize of the Meteoritical Society for "his experimental studies of iron-bearing sulfide formation in the solar system." Sulphides play a critical role in the condensation of solids from the nebula of gas where the solar system formed. Along with various cohorts of his students, he also worked on transport of material in the solar nebula, on the possibility of a meteorite source for the phosphorous necessary for life on Earth, and on the chemical processes occurring within asteroids early in their history. Despite this huge range of topics, Lauretta's papers explore their topics thoroughly; many are highly cited, and they often have provided the impetus for later papers, sometimes led by Lauretta and sometimes by his former students. For this work, he has received a Kavli fellowship and was recognized by *Discover* magazine in 2004 for a top-100 science discovery.

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In addition to his research, Laretta has successfully taught at all levels, from undergraduate General Education to graduate classes, and in all formats, from large-audience lectures to small seminar classes (including a TEDx talk). He won a University College of Science Distinguished Early Career Teaching Award in 2006. He has an exceptional record of service, including on advisory boards for both the College of Humanities (his undergraduate majors included Oriental Studies) and the Honors College.

The combination of studying the early solar nebula, the origin of life on Earth, and processes occurring on small bodies, coupled with the ability to master different analytical and theoretical techniques, shows the kind of breadth of intellectual curiosity that has allowed Laretta to lead OSIRIS-REx, an ambitious spacecraft mission with wide-ranging goals that build on his career long interest in the chemical processes that shaped the planets in the early Solar System. He has been working on this project since 2004, and it recently acquired the sample, which will be delivered to Earth in 2023. Being PI is in many ways a leadership position, and he is an excellent leader, as frequently noted by NASA through multiple Group Achievement Awards.

Sallie Marston (College of Social & Behavioral Sciences)

Dr. Sallie Marston is most noted for her groundbreaking work on citizenship, public space, and social reproduction. Aside from her scholarly articles, she has written one of the most widely used textbooks in her field. In 2013, she was honored with the Lifetime Achievement Award from the Association of American Geographers, a most distinguished honor in her discipline.

Throughout her career as a geographer, Professor Marston has contributed seminal works in her field. She is noted for her early work on the understanding of space and distinct populations. Her highly regarded article published in 1990, "Who Are 'The People'?: Gender, Citizenship, and the Making of the American Nation," looks at the relationship produced by public places and public spheres and the exclusionary powers such spaces can create. She considers historic gender exclusion of women in the private domestic sphere and extends this discussion to the LGBT population and their right to participate in the New York City St. Patrick's Day Parade.

In addition, her critical work on scale is acclaimed both nationally and internationally as adding new dimensions to the study of geography. Her 2000 article "The Social Construction of Scale" brings attention to the fact that homes and neighborhoods are often ignored. Her research and publications have brought her international acclaim, and she has had numerous international speaking invitations, including several from the United Kingdom. She has presented lectures at Queen Mary London University, University College London, Durham, Nottingham, and Southampton, and at the Institute of British Geographers' annual conferences. She has been an active member of

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editorial boards for a number of international journals, including *Progress in Human Geography* and the *Annals of the Association of American Geographers*.

Dr. Marston's stellar accomplishments have afforded her an international reputation, but at the same time, she is noted for her research in the Tucson community. In particular, the People's Geography Project is funded by a matching grant from the Agnese Haury Challenge Grant Program. The Project's centerpiece is the Community and School Garden Program, which promotes community-engaged scholarship through gardens for lower-income students and thus makes the study of geography relevant to community members.

Ian Pepper (College of Agriculture & Life Sciences)

Dr. Ian Pepper is a locally, nationally, and internationally renowned environmental microbiologist who has worked at the interface of human health and soils, potable water, and municipal wastes. A faculty member in the Department of Environmental Science at the University of Arizona for over 40 years, he is heralded for his basic and applied research, his exemplary efforts to train the next generation of scientists, and his public- and private-sector collaborations that further science-based decision making.

Dr. Pepper has focused on the fate and transport of pathogens in air, water, soils, and municipal wastes. He helped establish and has been connected to the National Science Foundation's Industry/University Cooperative Research Center on Water Quality for over 30 years. The list of research centers he has led includes the Water Quality Center, the Environmental Research Laboratory, and, most recently, the Water and Energy Sustainable Technology (WEST) Center. Co-located on the campus of the Agua Nueva Water Reclamation Facility, the WEST Center is an innovative partnership with Pima County and a unique laboratory for the study of treated wastewater.

There is no better example of how Dr. Pepper has impacted addressing real-world problems than his successful efforts to identify and quantify the COVID-19 virus in waste flows from University dormitories. His team's "wastewater-based epidemiology," which enabled the University to avoid a major campus outbreak, has been implemented in many other locations. Their methodology was quickly shared through media interviews and popular press.

Dr. Pepper's collaborative research and educational contributions, including authorship of multiple textbooks, have been recognized by numerous societies. He has been inducted as a Fellow by the Soil Science Society of America, the American Society of Agronomy, the American Academy of Microbiology, and the American Association for the Advancement of Science. Very recent awards include the 2019 Extraordinary Faculty Award from the UA Alumni Association and the 2020 Graduate Teaching and Mentoring Award from the UA Graduate College.

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Statutory/Policy Requirements

ABOR Policy 6-208 permits the rank of Regents Professor to be awarded only to full professors with exceptional achievements that have brought them national or international distinction. This highest of faculty ranks may be awarded to no more than three percent of the total of tenured and tenure-track faculty members.

EXECUTIVE SUMMARY

Item Name: First-Time Student Retention Report

Action Item

Requested Action: The board will review the First-Time Student Retention Report and will engage in a discussion with the universities.

Background/History of Previous Board Action

This inaugural comprehensive report on first-time student retention at Arizona’s public universities expands on previous oversight of retention through the board’s enterprise metrics and last year’s limited special report. The report provides retention rate data for each university, disaggregated by key categories of analysis such as attendance and residency status, academic program, gender and race/ethnicity.

Since 2010, the board has set annual first-time full-time student retention metric goals for each university. Actual first-time full-time retention rates for Fall 2020 and the metric goals for 2020 are listed in the table below.

	2020 First-Time Retention Actual	2020 First-Time Retention Goal
Arizona State University	86.2%	87%
Northern Arizona University	76.3%	77.2%
University of Arizona	85.5%	85%

Discussion

First-time student retention is an important measure of institutional effectiveness. The board tracks student retention because of the adverse consequences to the individual, university and state of Arizona when a student fails to continue their education. For students, failure to persist increases the likelihood of loan defaults, lower lifetime incomes, and unemployment. For institutions, retention rates impact rankings, reputation, and financial position. For Arizona, student retention is imperative to meeting the state’s educational goals and development of a 21st century workforce.

The board is expected to engage in a discussion with each university regarding its first-time student retention efforts including:

- Reasons for variance in retention rates across different categories of analysis, such as instructional modality, attendance and residency status, academic program, gender and race/ethnicity.

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- Progress towards retention metric goals
- The effectiveness and iterative improvement of retention programs

Attached is a comprehensive report on first-time student retention for fiscal year 2020.

Statutory/Policy Requirements

A.R.S. §15-1626

Please see the ABOR Report on First-Time Student Retention

FISCAL YEAR 2020

FIRST-TIME STUDENT RETENTION REPORT





ABOUT THIS REPORT

This is an inaugural report on first-time student retention at Arizona's public universities, which expands on previous oversight of retention through the board's enterprise metrics and special reports. Retention rates are an important leading indicator of progress toward degree completion and a key measure of overall university success. A retention rate is defined as the percentage of first-time students who return to the same institution for a second fall semester. This report provides retention rate data for each institution, disaggregated by key categories of analysis such as attendance and residency status, academic program, gender and race/ethnicity.

Throughout this report there are exhibits where specific data points have been omitted either because data for prior years was not previously surveyed, or because the data needed to be redacted to maintain student privacy in instances where cross-tabulations resulted in five or fewer students.

ABOUT THE ARIZONA BOARD OF REGENTS

The Arizona Board of Regents is committed to ensuring access for qualified residents of Arizona to undergraduate and graduate institutions; promoting the discovery, application, and dissemination of new knowledge; extending the benefits of university activities to Arizona's citizens outside the university; and maximizing the benefits derived from the state's investment in education.

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First-time student retention rates are an important measure of institutional effectiveness. The board tracks first-time student retention because of the adverse consequences to the individual, university and state of Arizona when a student fails to continue their education. For students, failure to persist increases the likelihood of loan defaults, lower lifetime incomes and higher unemployment.¹ For institutions, retention rates impact rankings, reputation and financial position. For Arizona, student retention is imperative to meeting the state's educational attainment goals and the development of a 21st century workforce.

Key findings of this report are as follows:

- At Arizona State University, the full-time student retention rate declined slightly year over year from 86.7% in 2019 to 86.2% in 2020. Part-time student retention, which represents 11.3% of all first-time enrollments, improved from 44.5% in 2019 to 49.3% in 2020. Full-time student retention also declined slightly at Northern Arizona University from 77.6% in 2019 to 76.3% in 2020, whereas part-time student retention - 12.4% of all first-time enrollments - rose from 50.3% to 54.6%. By contrast, full-time student retention improved at the University of Arizona from 83.2% to 85.5% year-over-year, while part-time retention - 21.5% of all first-time enrollments - was essentially static at 66.7% in 2019 and 66.8% in 2020.
- At all three universities, on-campus students were retained at much higher rates than online students (85.9% vs. 49.2% at ASU; 73.9% vs. 48.5% at NAU; 81.8% vs. 42% at UArizona). It should be noted that online students constitute a small proportion of all first-time students - 10.5% at ASU; 1.2% at NAU; and 0.9% at UArizona.
- At all of the institutions there was considerable variance in retention rates across degree programs. At ASU the bachelor's degree program in finance had the highest retention rate - 93.4% - and the bachelor's degree program in information technology the lowest at 58.1%. At NAU, the bachelor's degree program in modern languages had the highest retention rate at 92.6% and the bachelor's degree program in anthropology the lowest - 53.1%. At UArizona the statistics and data science major and the dance major had the highest retention rates at 100%, while the lowest retention rate was for students in science without a declared major - 58.8%.
- Arizona resident students are retained at higher rates than non-resident students at all of the universities: 87.7% vs. 74.6% at ASU; 77.1% vs. 67.8% at NAU; and 83.8% vs. 78.5% at UArizona.
- Encouragingly, the retention gap between Pell Grant²-recipient students and non-Pell Grant recipient students is relatively small at all three institutions (80.3% vs. 83.0% at ASU; 70.7% vs. 75% at NAU; 78.1% vs. 82.6% at UArizona).
- Large variances in retention rates across racial and ethnic groups persist at all of the universities. There were, however, notable improvements at NAU in African American student retention, which is up 10.3 percentage points since 2019 to 63.4%, and in American Indian student retention - up 6.2 percentage points since 2019 to 64.7% - and at UArizona in Hispanic student retention, which has increased 1.9 percentage points since 2019 to 79.2%.

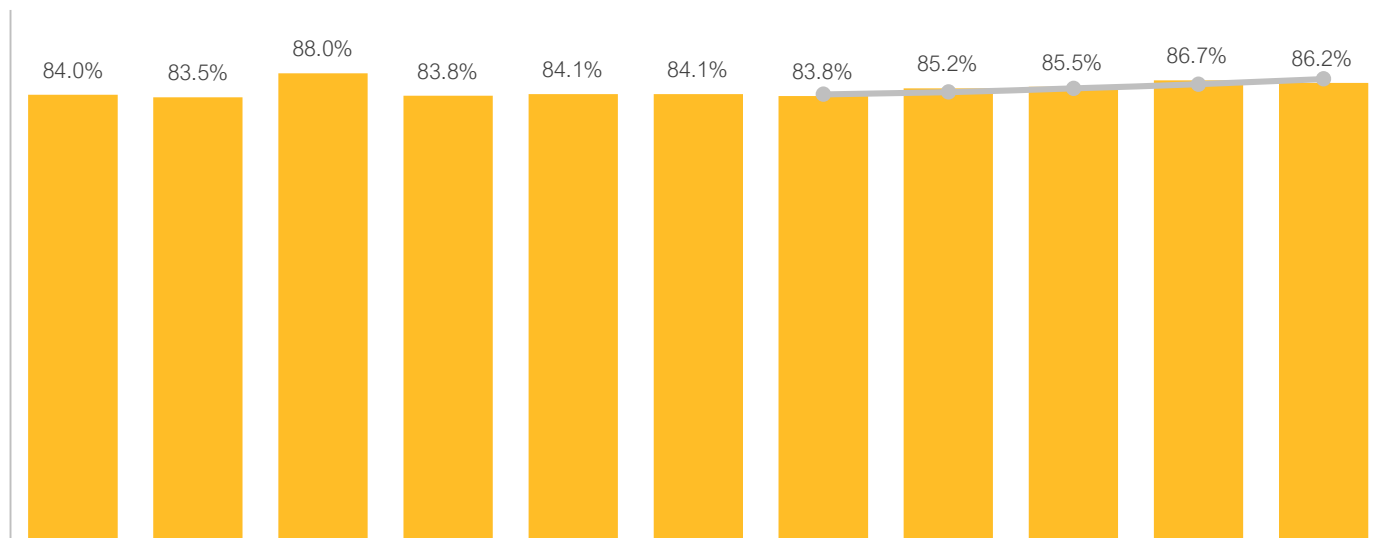
¹ Council of Economic Advisers (2016), Investing in Higher Education: Benefits, Challenges, and the State of Student Debt, Figure 27. https://obamawhitehouse.archives.gov/sites/default/files/page/files/20160718_cea_student_debt.pdf.

² Pell Grants are awarded by the Federal Government to undergraduates with acute financial need. Pell-Grant recipient status is routinely employed as a proxy for low-income status.

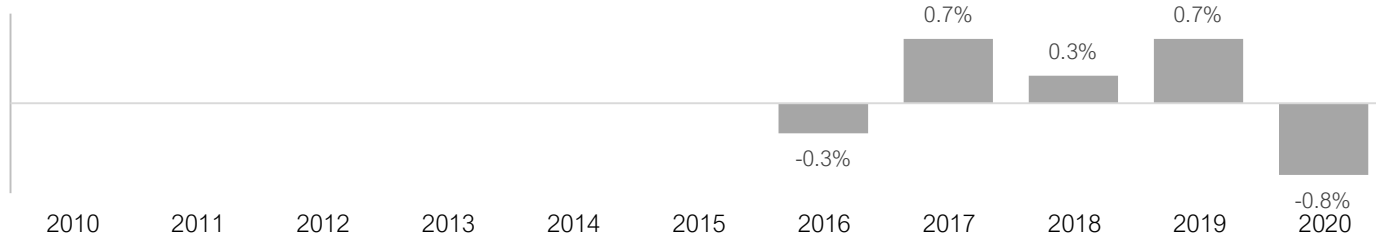


Exhibit ASU.FTSR.1: First-Time, Full-Time Student Retention Rate and Goals

Retention Rates and Goals



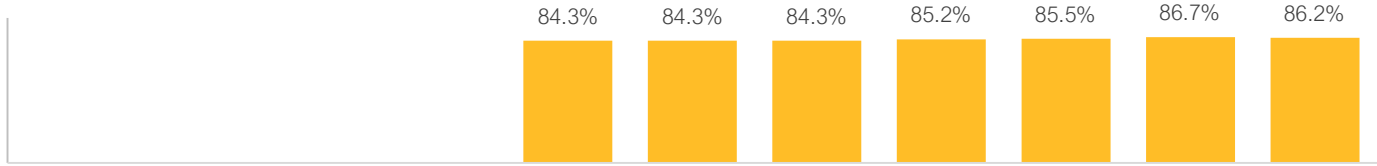
Actual to Goal Differences



Arizona State University

Exhibit ASU.FTSR.2: First-Time, On-Campus Student Retention Rate

Full-Time Students



Part-Time Students

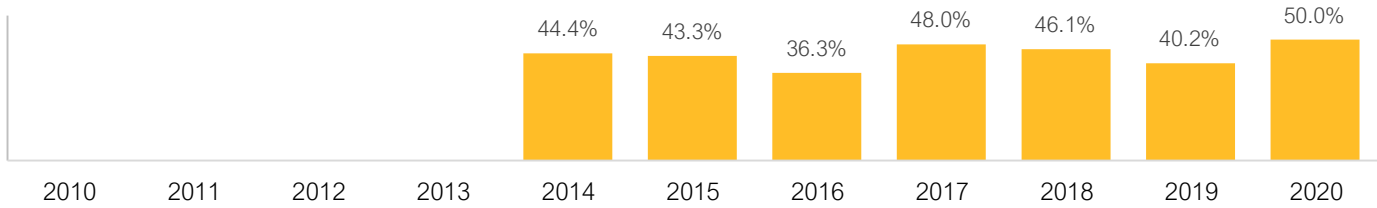


Exhibit ASU.FTSR.3: First-Time Student Headcount, Retention Rate and Average High School GPA by Geographic Site

Geographic Site	First-Time Students	Retention Rate	Average High School GPA
ASU Tempe	10,478	86.1%	3.50
ASU Downtown	1,790	83.5%	3.50
ASU West	859	89.3%	3.46
ASU Polytechnic	689	84.0%	3.46
ASU@Lake Havasu	25	80.0%	3.31
ASU@Cochise			
ASU@Pima			
ASU@Pinal			
ASU@The Gila Valley			
ASU@Tucson			
ASU@Washington, DC			
ASU@Yavapai			
ASU@Yuma			
ASU Online	1,625	49.2%	3.09

Note: Retention rates and average high school GPAs redacted where there are five or fewer students. Average high school GPAs calculated using only those students for which a high school GPA is available. All student GPAs adjusted to a four-point scale.

Arizona State University

Exhibit ASU.FTSS.4: First-Time Student Headcount Enrollment by Credit Hours and Program Modality

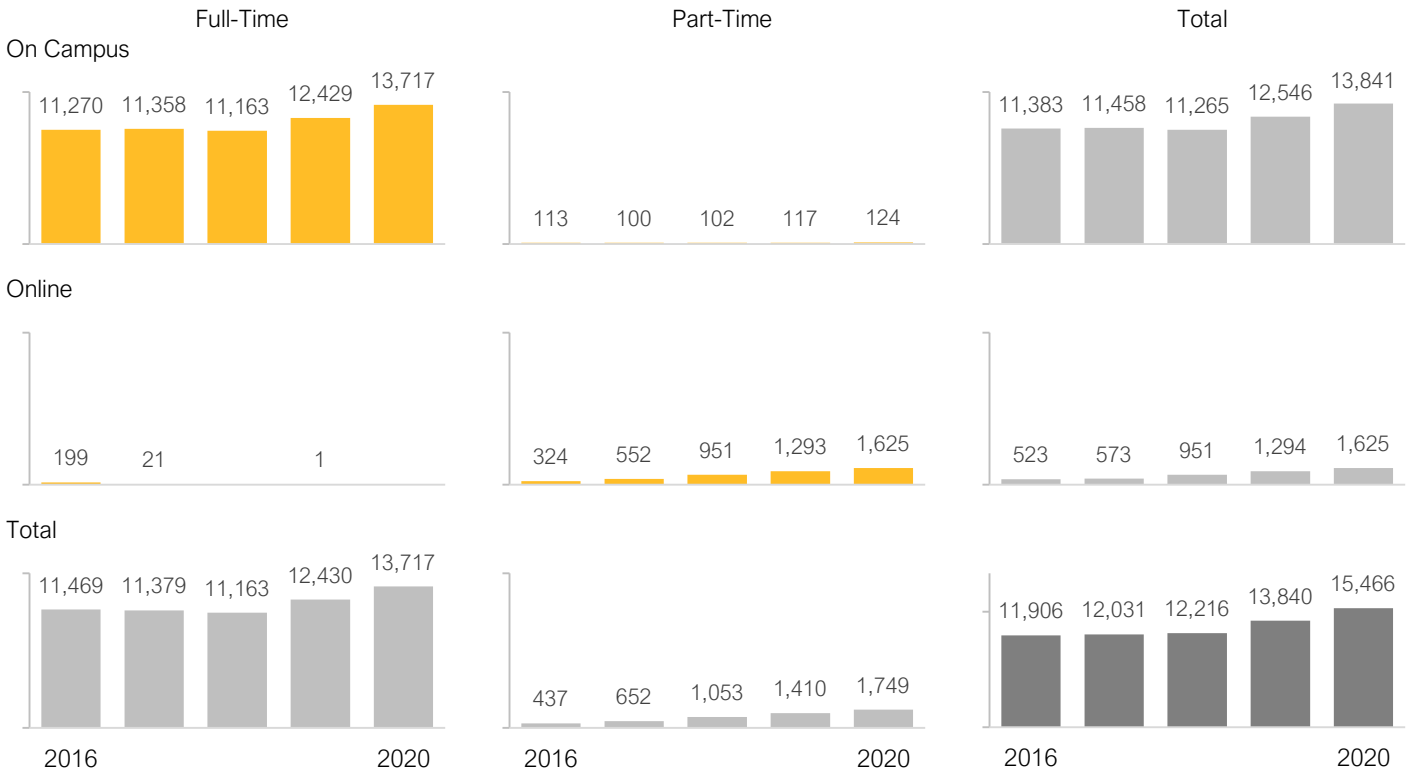
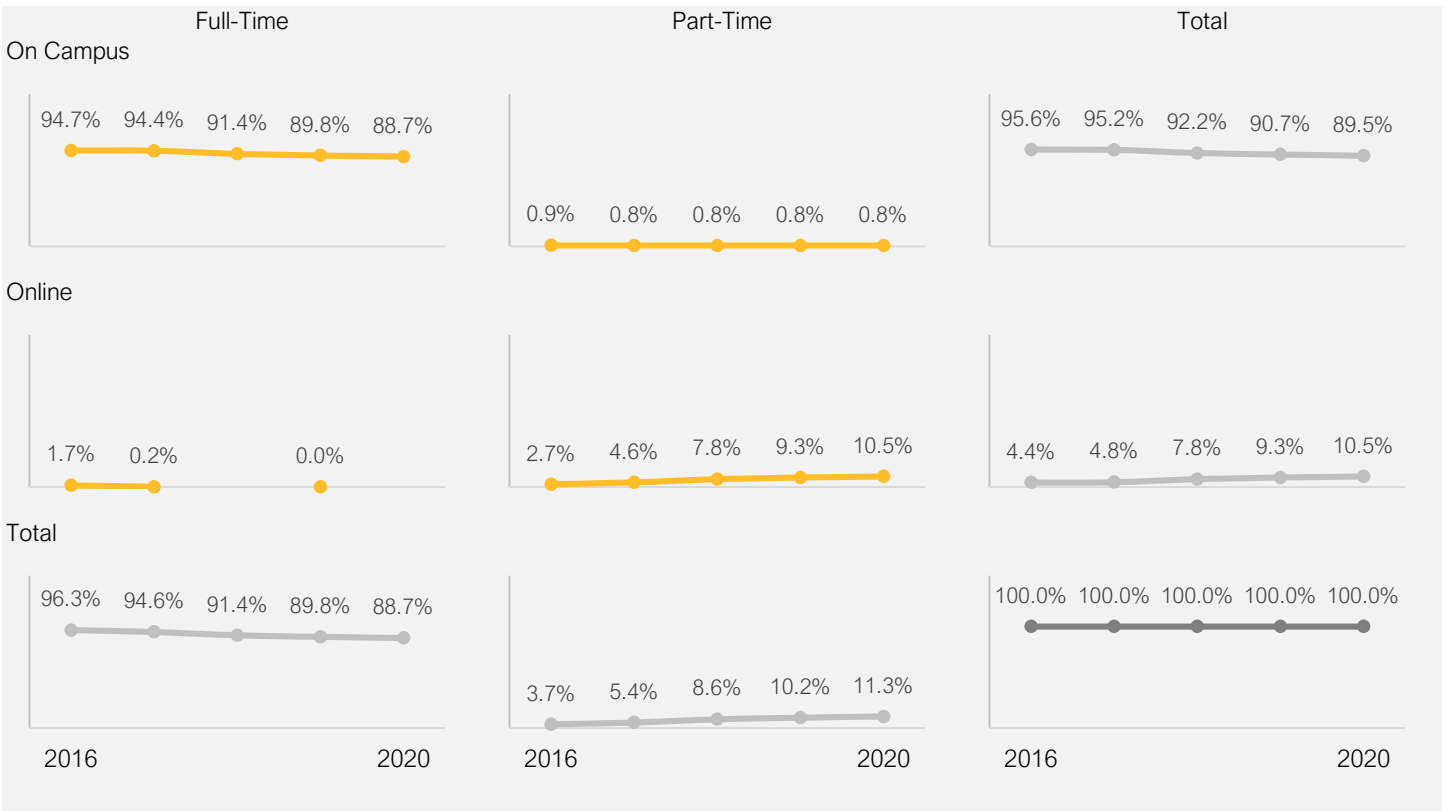


Exhibit ASU.FTSS.5: Percentage of First-Time Students by Credit Hours and Program Modality



Arizona State University

Exhibit ASU.FTSR.6: First-Time Student Retention Rate by Credit Hours and Program Modality

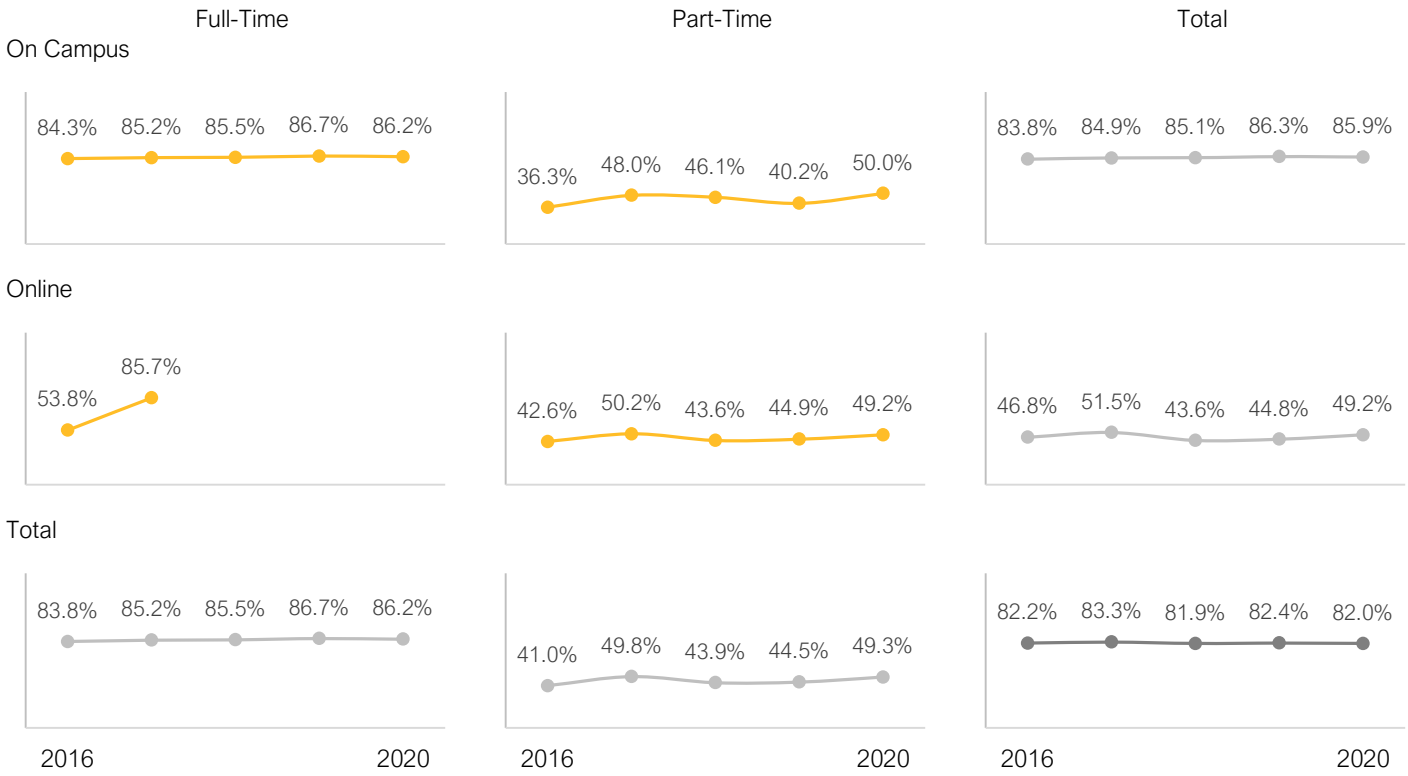
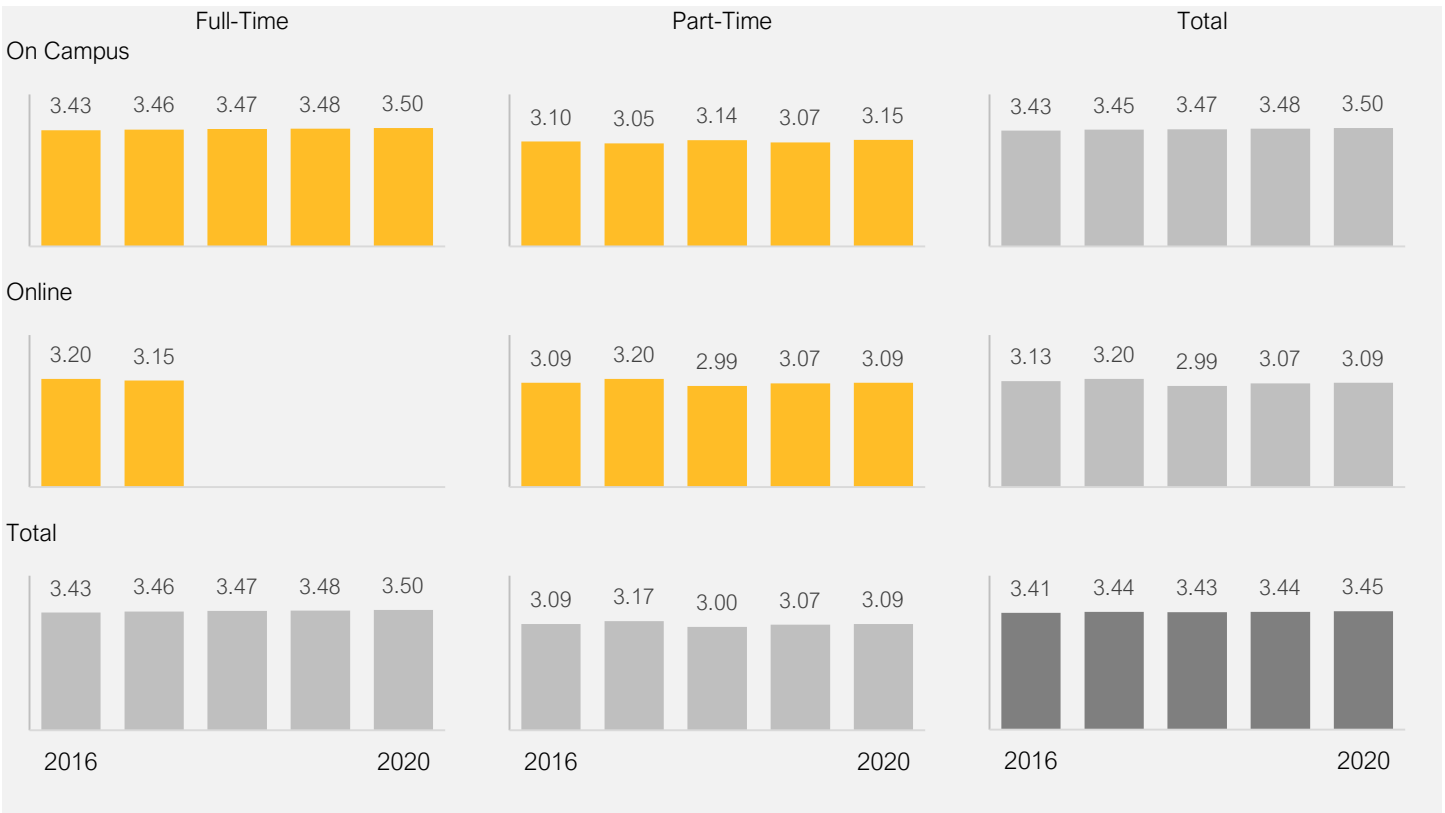


Exhibit ASU.FTSR.7: Average High School GPA of First-Time Students by Credit Hours and Program Modality



Note: Retention rates and average high school GPAs redacted where there are five or fewer students. Average high school GPAs calculated using only those students for which a high school GPA is available. All student GPAs adjusted to a four-point scale.

Exhibit ASU.FTSR.8: First-Time Student Headcount and Retention Rate By Classification of Instructional Programs

Classification of Instructional Program (CIP)	Students	Retention Rate
52 Business, Management, Marketing, and Related Support Services	3,473	82.4%
14 Engineering	2,033	85.5%
26 Biological and Biomedical Sciences	1,678	80.8%
51 Health Professions and Related Programs	1,182	81.6%
11 Computer and Information Sciences and Support Services	1,154	87.3%
42 Psychology	926	77.4%
50 Visual and Performing Arts	801	80.3%
45 Social Sciences	526	83.3%
09 Communication, Journalism, and Related Programs	515	80.8%
13 Education	334	85.9%
43 Homeland Security, Law Enforcement, Firefighting, and Related Protective Services	319	68.3%
40 Physical Sciences	264	84.8%
31 Parks, Recreation, Leisure, and Fitness Studies	259	81.5%
04 Architecture and Related Services	191	82.2%
23 English Language, Literature, and Letters	142	70.4%
30 Interdisciplinary Studies	137	82.5%
27 Mathematics and Statistics	126	88.9%
44 Public Administration and Social Service Professions	114	77.2%
19 Family, Consumer, and Human Sciences	112	63.4%
49 Transportation and Materials Moving	111	86.5%
15 Engineering Technologies and Engineering Related Fields	97	80.4%
10 Communications Technologies, Technicians, and Support Services	82	84.1%
22 Legal Professions and Studies	81	86.4%
03 Natural Resources and Conservation	70	88.6%
38 Philosophy and Religious Studies	67	76.1%
54 History	55	90.9%
16 Foreign Languages, Literatures, and Linguistics	51	76.5%
24 Liberal Arts and Sciences, General Studies, and Humanities	22	59.1%
05 Area, Ethnic, Cultural, Gender, and Group Studies	14	71.4%
01 Agriculture, Agriculture Operations, and Related Sciences		
25 Library Science		
29 Military Technologies and Applied Sciences		
32 Basic Skills, Developmental, and Remedial Education		
41 Science Technologies and Technicians		
60 Residency Programs		
(Unspecified)	536	80.4%

Note: Includes all Classification of Instructional Programs offered by Arizona public universities. Students may be counted in more than one program.

Arizona State University

Exhibit ASU.FTSR.9: First-Time Student Headcount and Retention Rate in Top 50 Academic Programs

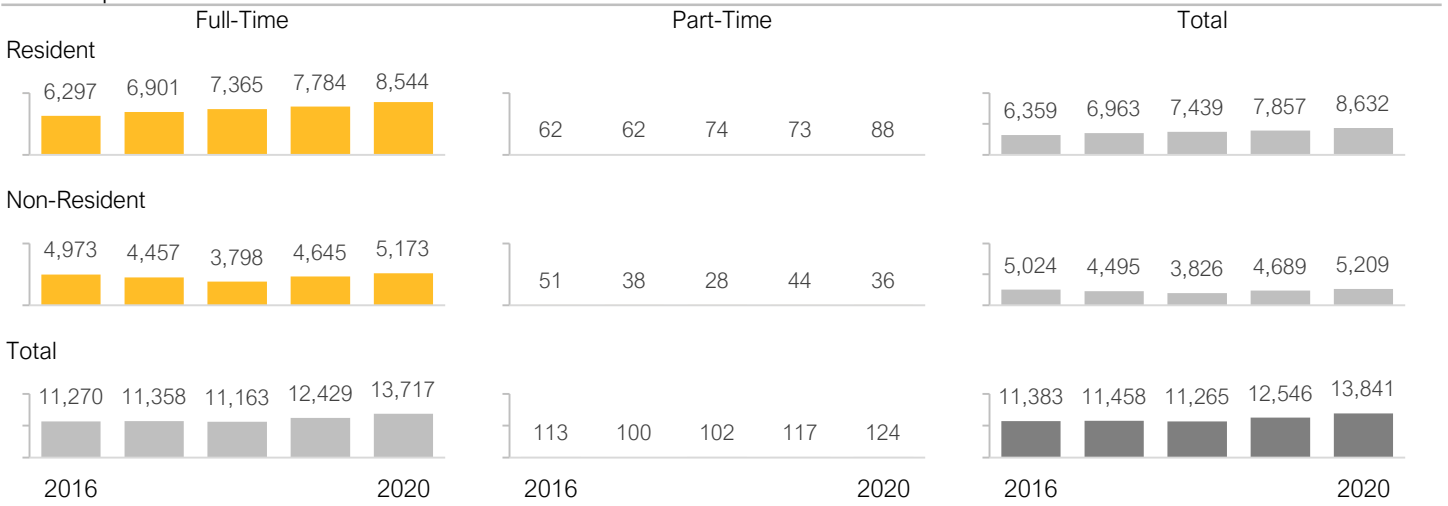
Academic Program	Students	Retention Rate
Business (BA)	2,211	78.9%
Biological Sciences (BS)	1,107	79.7%
Computer Science (BS)	944	90.3%
Exploratory (EXPL)	532	80.3%
Psychology (BS)	467	79.2%
Psychology (BA)	443	75.4%
Mechanical Engineering (BSE)	403	87.8%
Nursing (BSN)	335	92.2%
Criminology & Criminal Justice (BS)	319	68.3%
Medical Studies (BS)	297	86.5%
Aerospace Engineering (BSE)	293	81.6%
Community Health (BS)	290	72.4%
Finance (BS)	288	93.4%
Biochemistry (BS)	258	75.6%
Biomedical Engineering (BSE)	250	92.4%
Marketing (BS)	233	90.1%
Electrical Engineering (BSE)	219	85.8%
Film (BA)	211	75.8%
Engineering (BSE)	199	82.4%
Business Entrepreneurship (BS)	183	85.2%
Journalism & Mass Communication (BA)	163	89.0%
Kinesiology (BS)	162	81.5%
Economics (BS)	154	87.0%
Civil Engineering (BSE)	153	86.9%
Architectural Studies (BSD)	151	83.4%
Management (BS)	151	87.4%
Chemical Engineering (BSE)	141	91.5%
English (BA)	137	71.5%
Sports Journalism (BA)	123	90.2%
Elementary Education (BAE)	119	88.2%
Art (BFA)	118	73.7%
Computer Systems Engineering (BSE)	116	85.3%
Political Science (BA)	115	82.6%
Aeronautical Management Technology (BS)	111	86.5%
Software Engineering (BS)	111	67.6%
Accountancy (BS)	109	90.8%
Information Technology (BS)	105	58.1%
Political Science (BS)	98	89.8%
Applied Biological Sciences (BS)	97	86.6%
Earth & Space Exploration (BS)	91	75.8%
Secondary Education (BAE)	90	88.9%
Graphic Design (BSD)	87	90.8%
Interior Design (BSD)	86	82.6%
Supply Chain Management (BS)	82	89.0%
Speech & Hearing Science (BS)	79	86.1%
Forensic Science (BS)	79	89.9%
Exercise & Wellness (BS)	75	81.3%
Mathematics (BS)	75	89.3%
Digital Culture (BA)	75	86.7%
Biology (BS)	68	86.8%

Note: Students may be counted in more than one program.

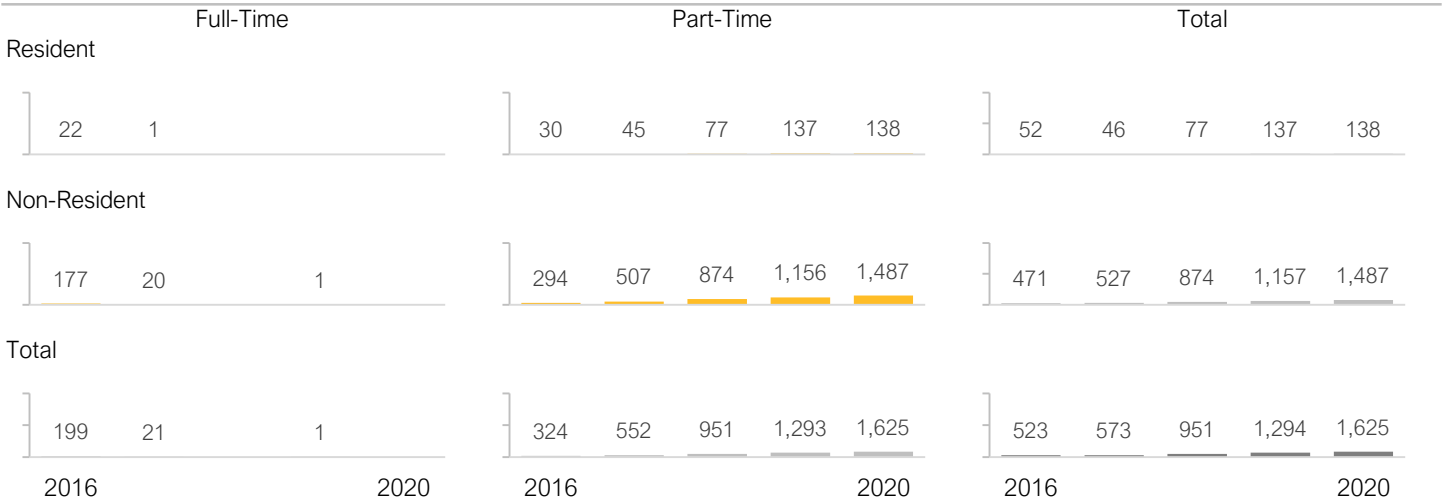
Arizona State University

Exhibit ASU.FTSR.10: First-Time Student Headcount Enrollment by Credit Hours and Arizona Residency

On Campus



Online



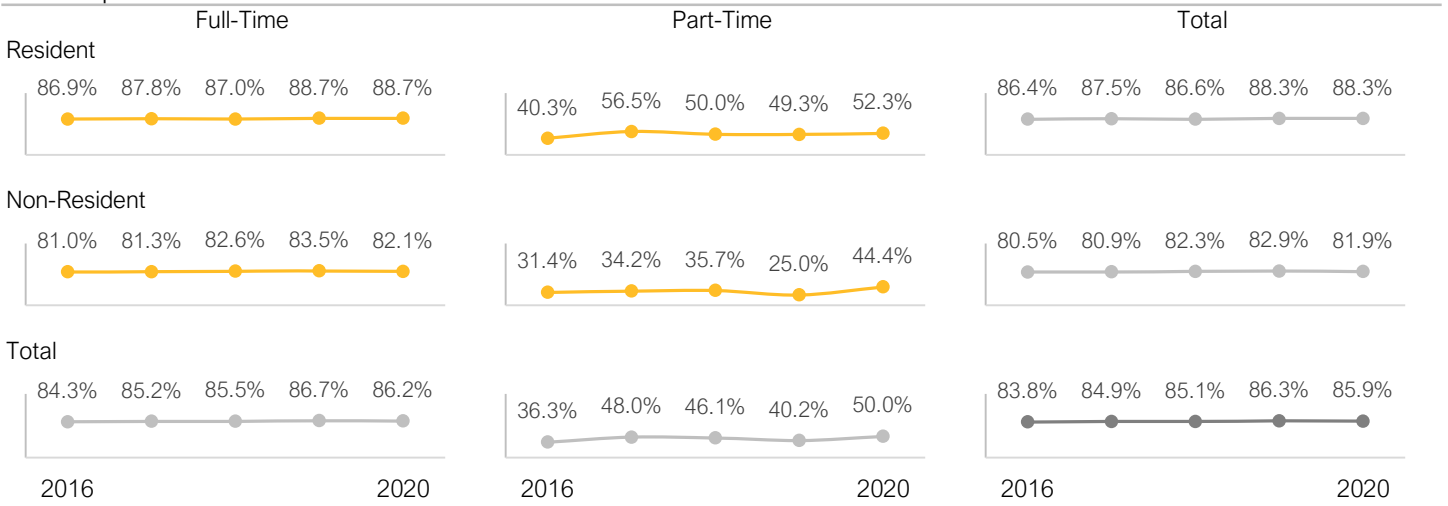
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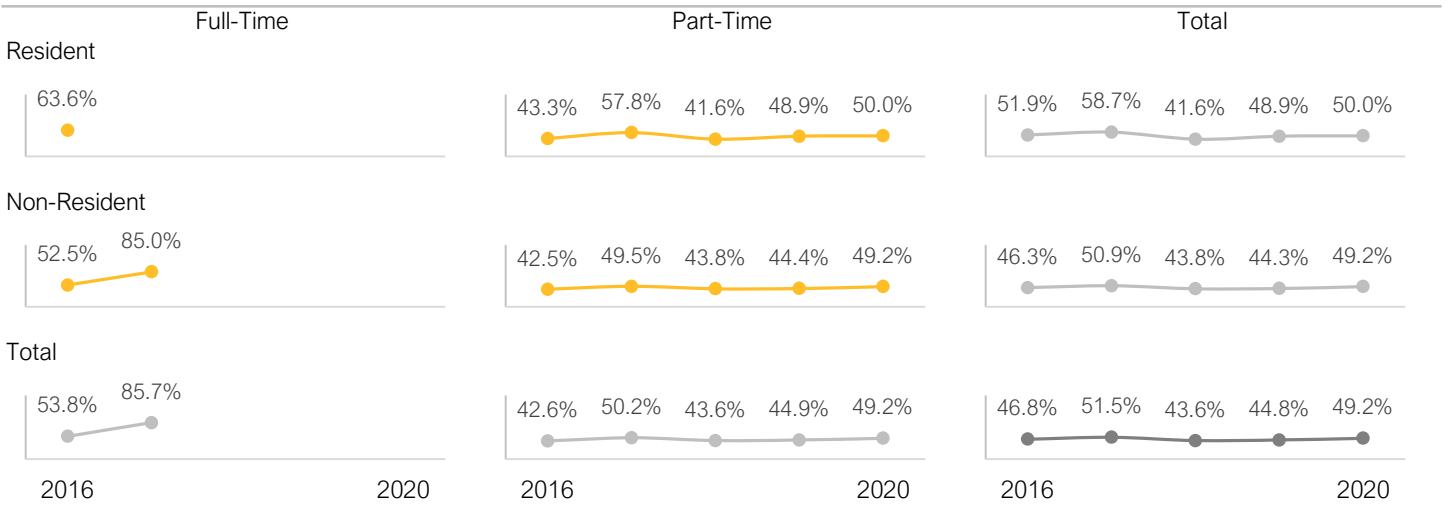
Arizona State University

Exhibit ASU.FTSR.11: First-Time Student Retention Rate by Credit Hours and Arizona Residency

On Campus



Online



Total

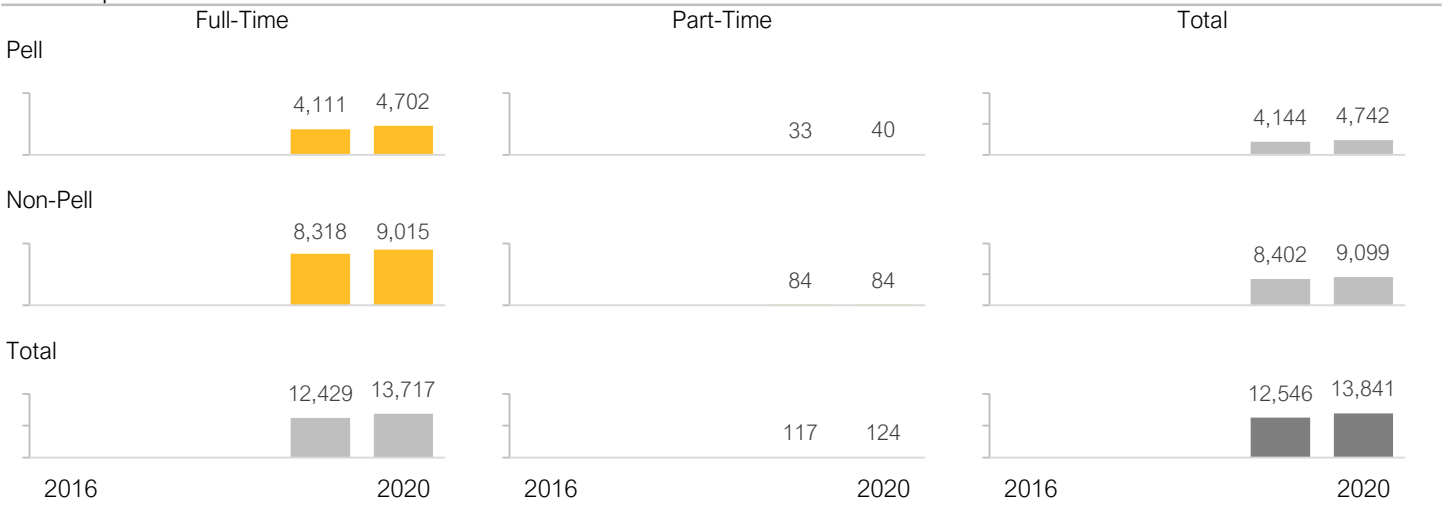


Note: Retention rates redacted where there are five or fewer students.

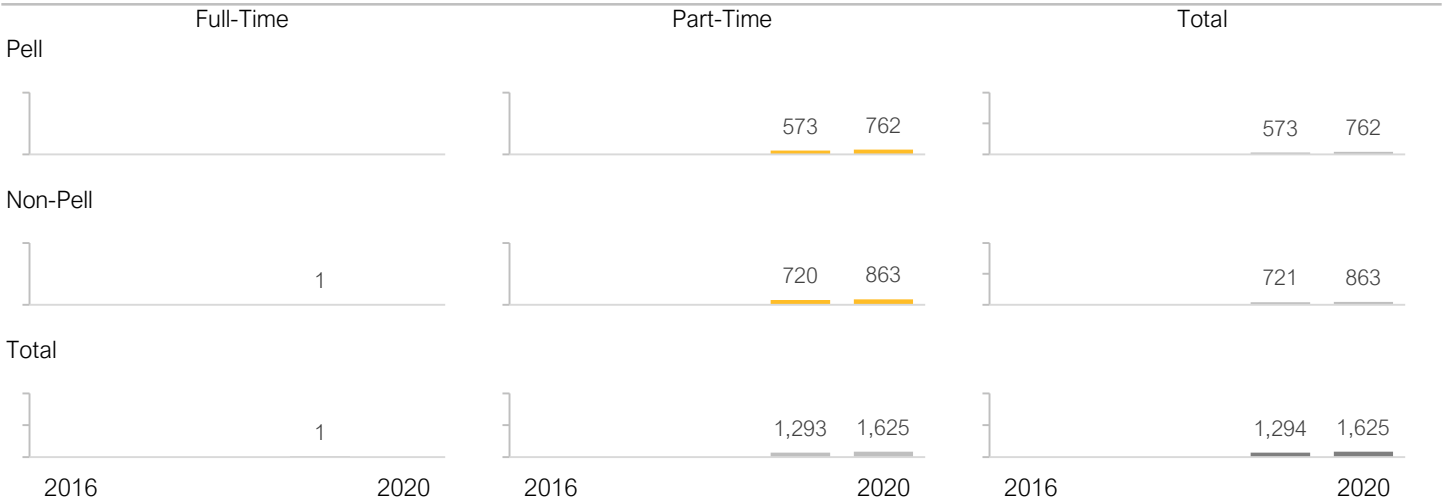
Arizona State University

Exhibit ASU.FTSR.12: First-Time Student Headcount Enrollment by Credit Hours and Pell Status

On Campus



Online



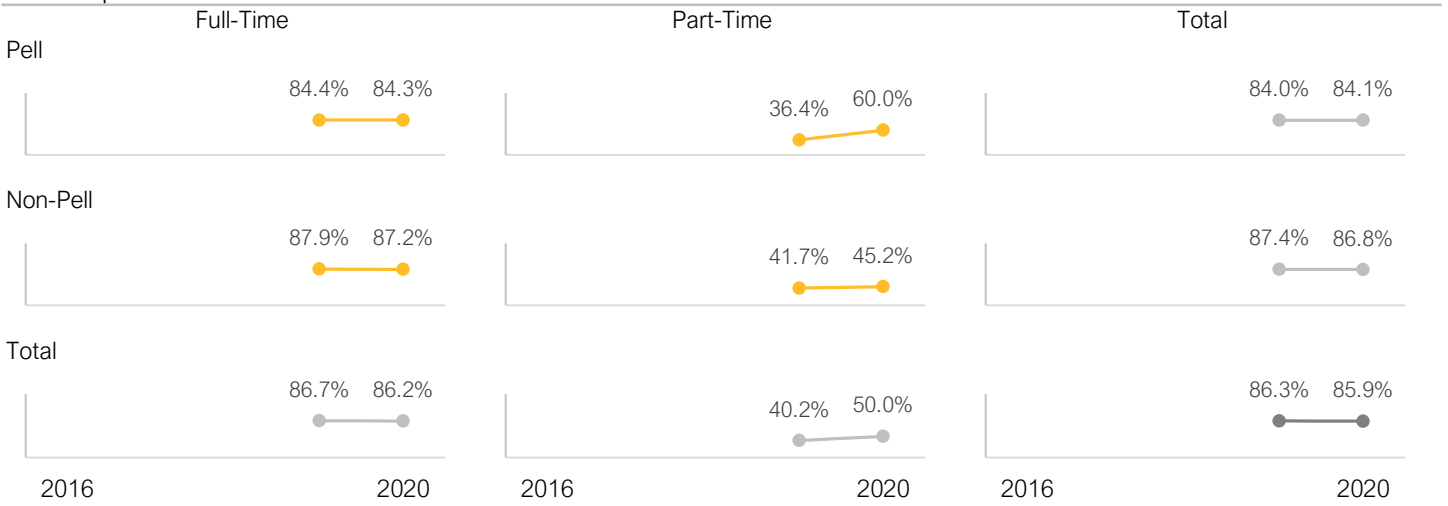
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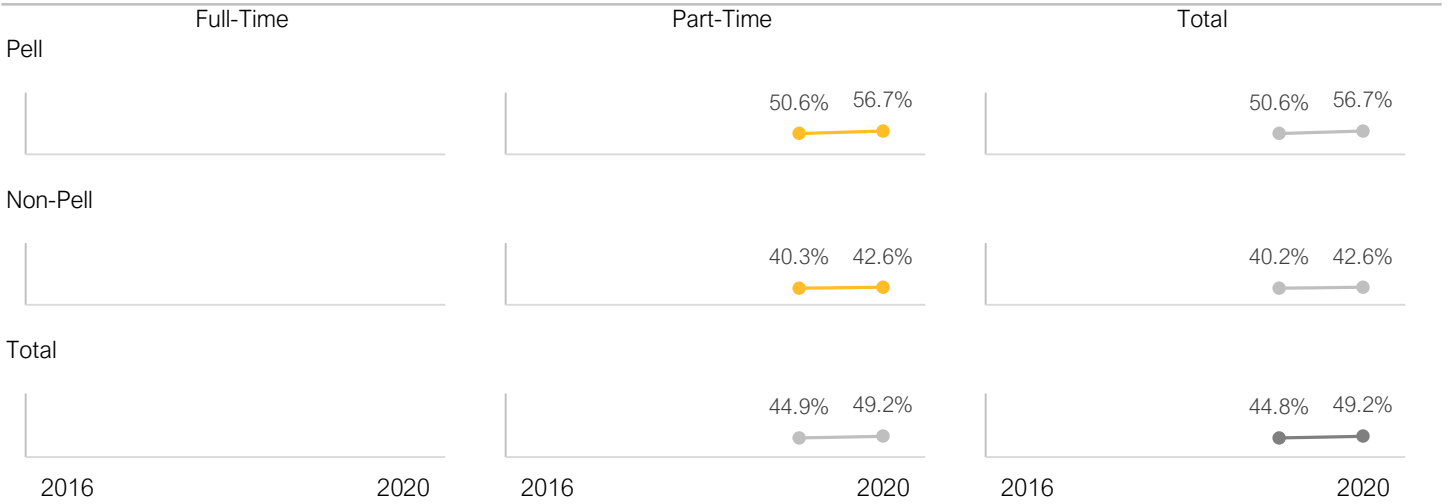
Arizona State University

Exhibit ASU.FTSR.13: First-Time Student Retention Rate by Credit Hours and Pell Status

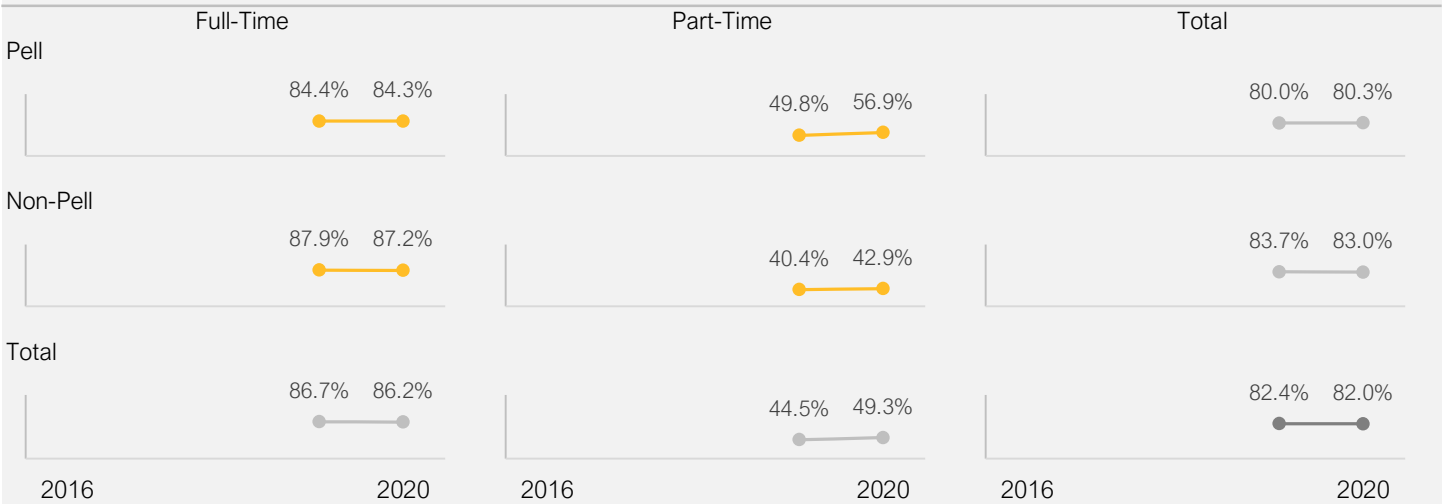
On Campus



Online



Total

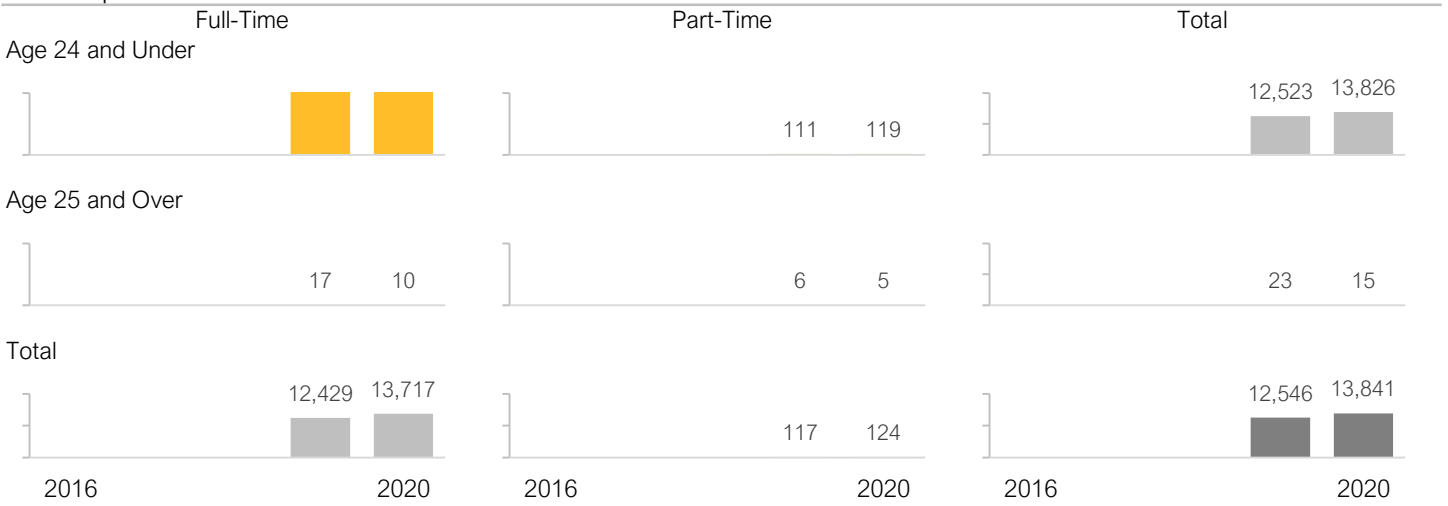


Note: Retention rates redacted where there are five or fewer students.

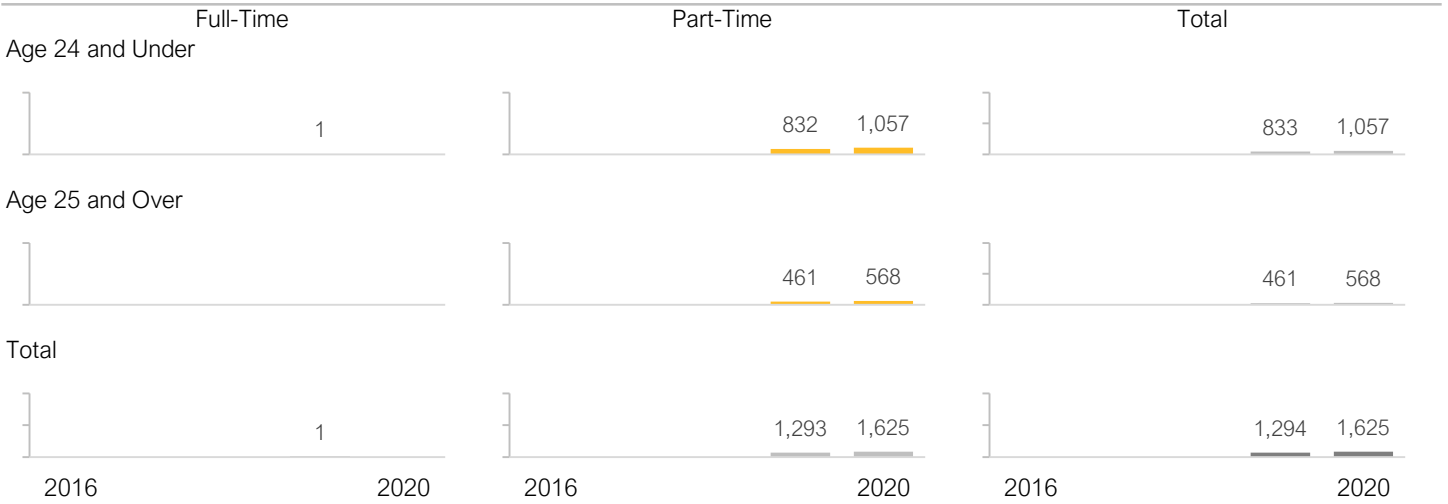
Arizona State University

Exhibit ASU.FTSR.14: First-Time Student Headcount Enrollment by Credit Hours and Age

On Campus



Online



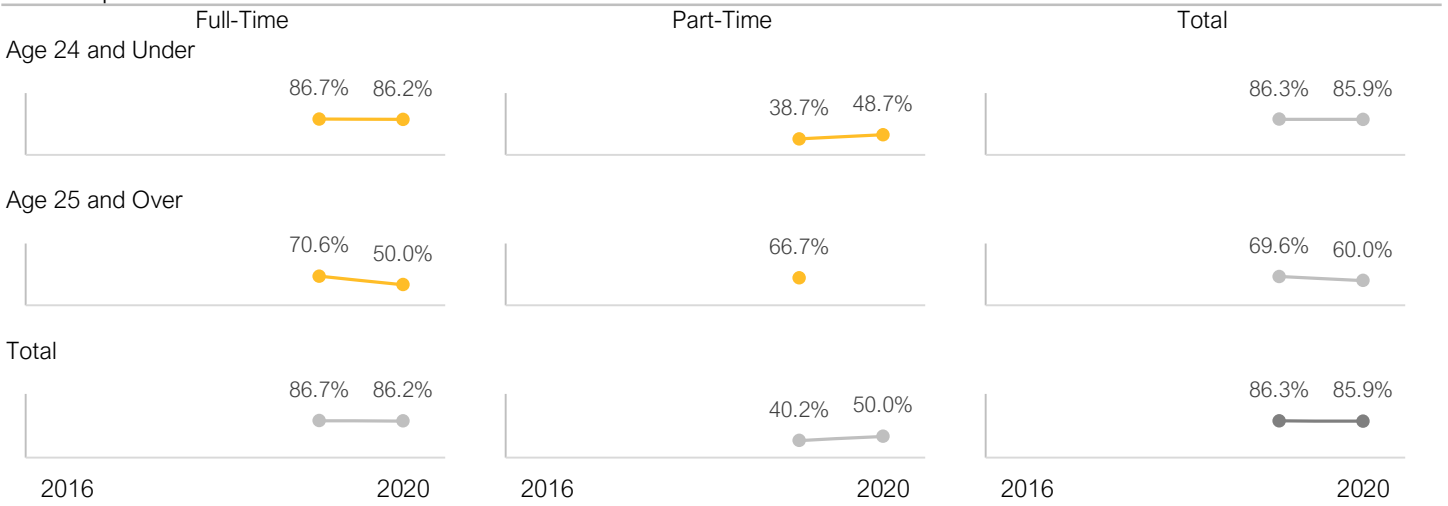
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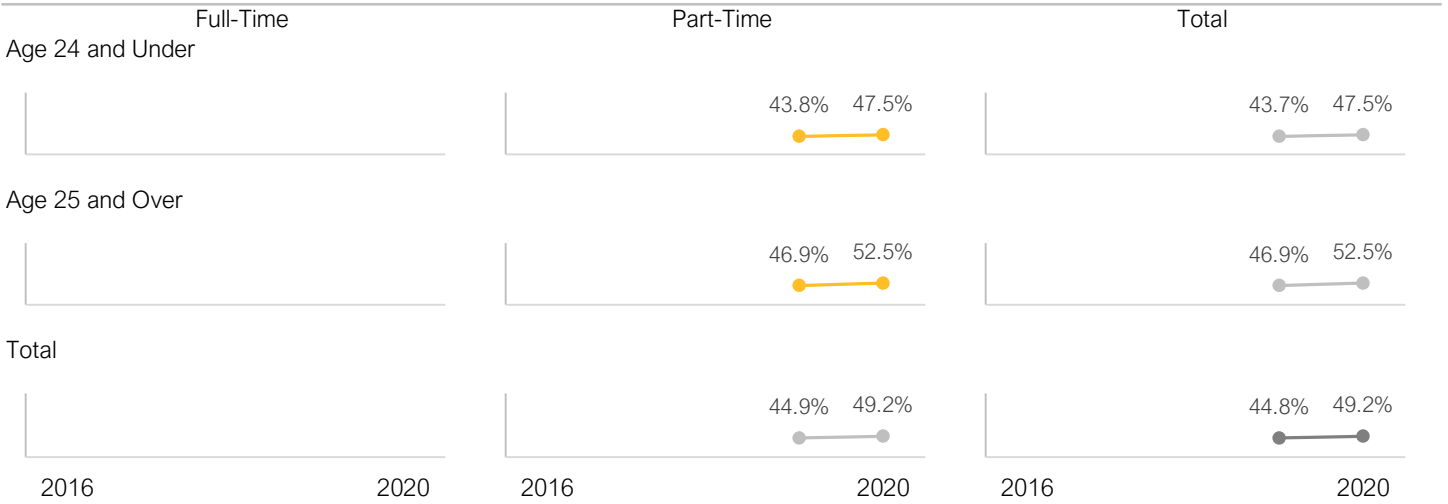
Arizona State University

Exhibit ASU.FTSR.15: First-Time Student Retention Rate by Credit Hours and Age

On Campus



Online



Total



Note: Retention rates redacted where there are five or fewer students.

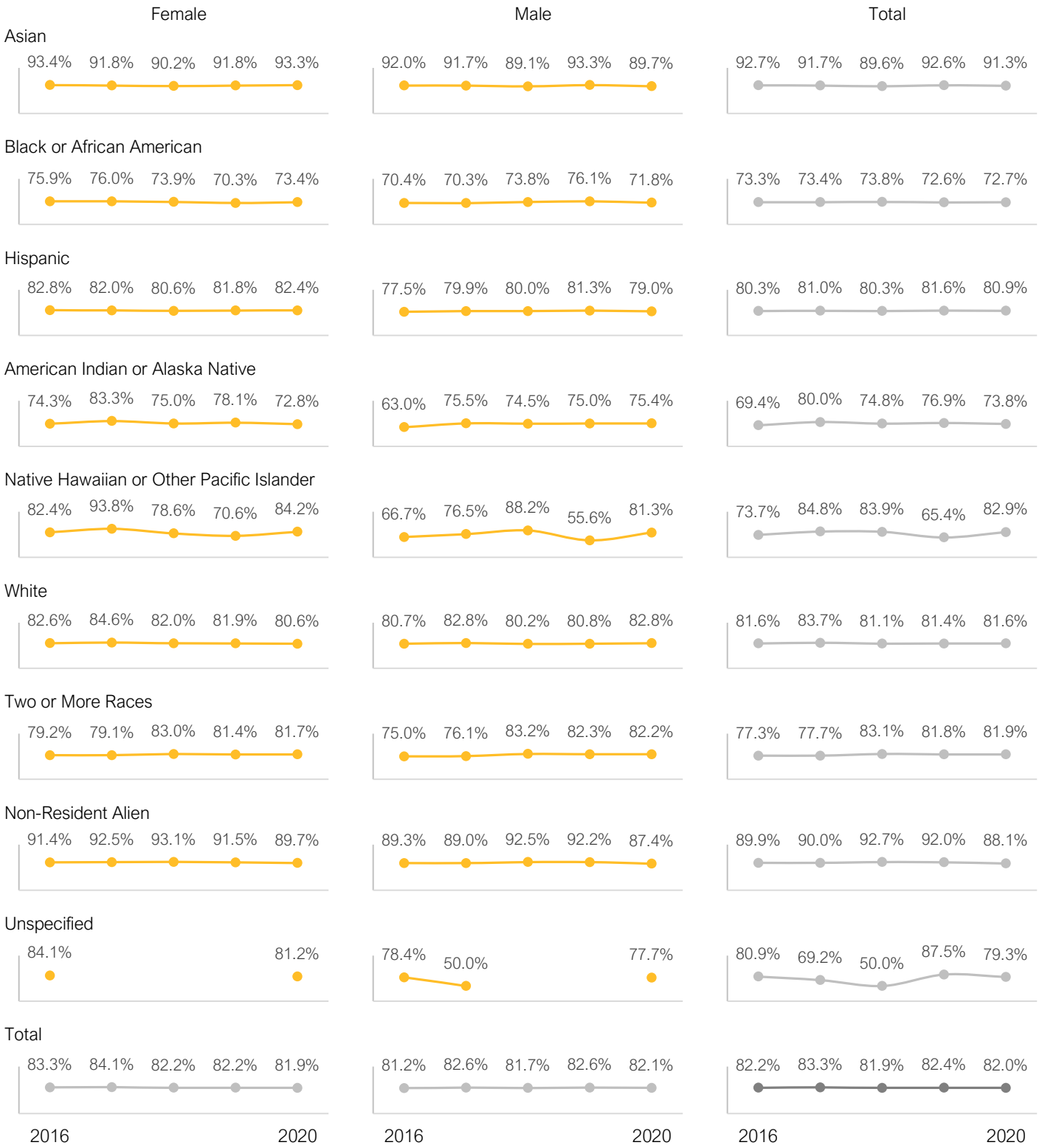
Arizona State University

Exhibit ASU.FTSR.16: First-Time Student Headcount Enrollment by Gender and Race Ethnicity



Arizona State University

Exhibit ASU.FTSR.17: First-Time Student Retention Rate by Gender and Race Ethnicity

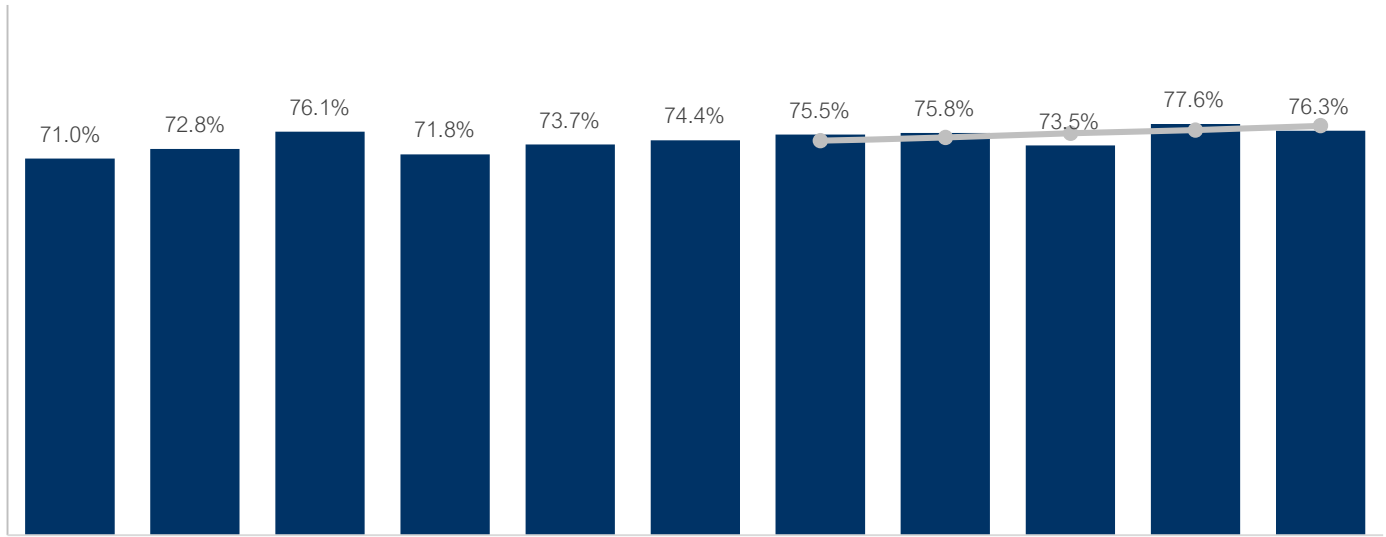


Note: Retention rates redacted where there are five or fewer students.

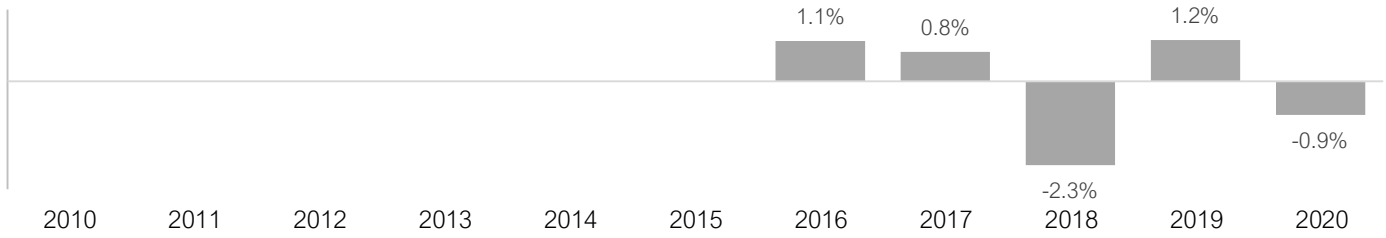
Northern Arizona University

Exhibit NAU.FTSR.1: First-Time, Full-Time Student Retention Rate and Goals

Retention Rates and Goals



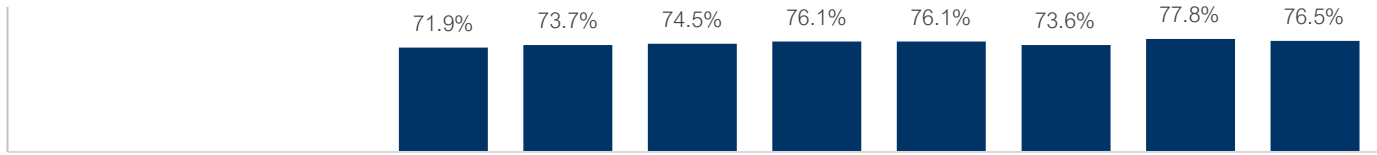
Actual to Goal Differences



Northern Arizona University

Exhibit NAU.FTSR.2: First-Time, On-Campus Student Retention Rate

Full-Time Students



Part-Time Students

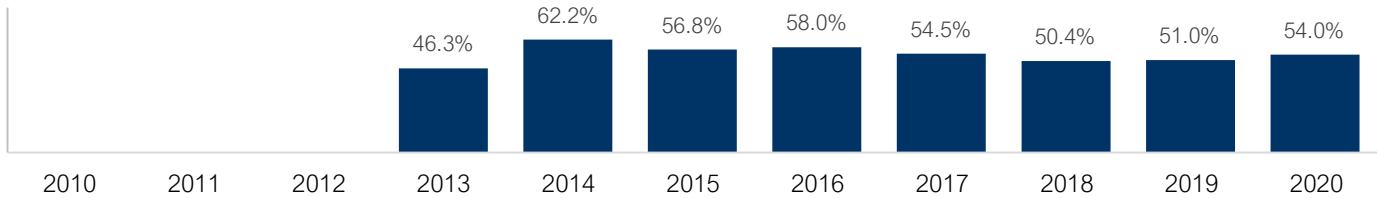


Exhibit NAU.FTSR.3: First-Time Student Headcount, Retention Rate and Average High School GPA by Geographic Site

Geographic Site	First-Time Students	Retention Rate	Average High School GPA
NAU Flagstaff Mountain	5,376	73.9%	3.66
NAU Yuma	5		
NAU Glendale Cmty Coll	1		
NAU Phoenix College	1		
NAU South Mountain Cmty Coll	1		
NAU Bullhead City			
NAU Central Arizona College			
NAU Chandler-Gilbert Cmty Coll			
NAU Communiversity @ Queen Creek			
NAU Communiversity @ Surprise			
NAU Eastern Arizona College			
NAU Estrella Mountain Cmty Col			
NAU Fort Defiance			
NAU GateWay			
NAU Marine Corps Air Station Yuma			
NAU Mesa Cmty Coll			
NAU Mohave Cmty Coll			
NAU NAU - East Valley			
NAU NAU - North Valley			
NAU NAU - Yavapai			
NAU Navajo-Hopi			
NAU Northland Pioneer College			
NAU Paradise Valley Cmty Coll			
NAU Phoenix Biomedical			
NAU Pima Cmty Coll, Community			
NAU Pima Cmty Coll, Desert Vista			
NAU Pima Cmty Coll, Downtown			
NAU Pima Cmty Coll, West			
NAU Scottsdale Cmty Coll			
NAU Tucson North			
NAU Yavapai College			
NAU Online	46	65.2%	3.05
NAU Personalized Learning	20	10.0%	3.12

Note: Retention rates and average high school GPAs redacted where there are five or fewer students. Average high school GPAs calculated using only those students for which a high school GPA is available. All student GPAs adjusted to a four-point scale.

Northern Arizona University

Exhibit NAU.FTSR.4: First-Time Student Headcount Enrollment by Credit Hours and Program Modality

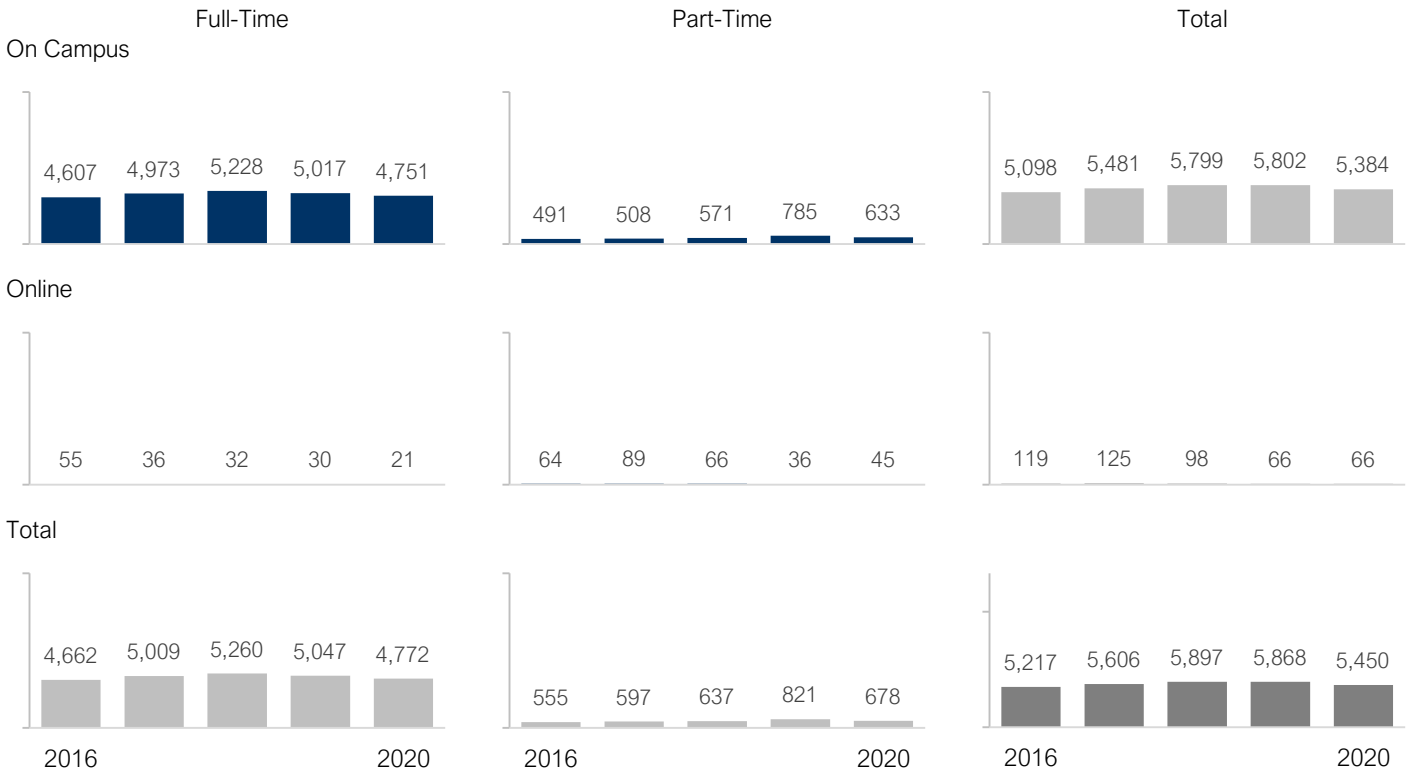
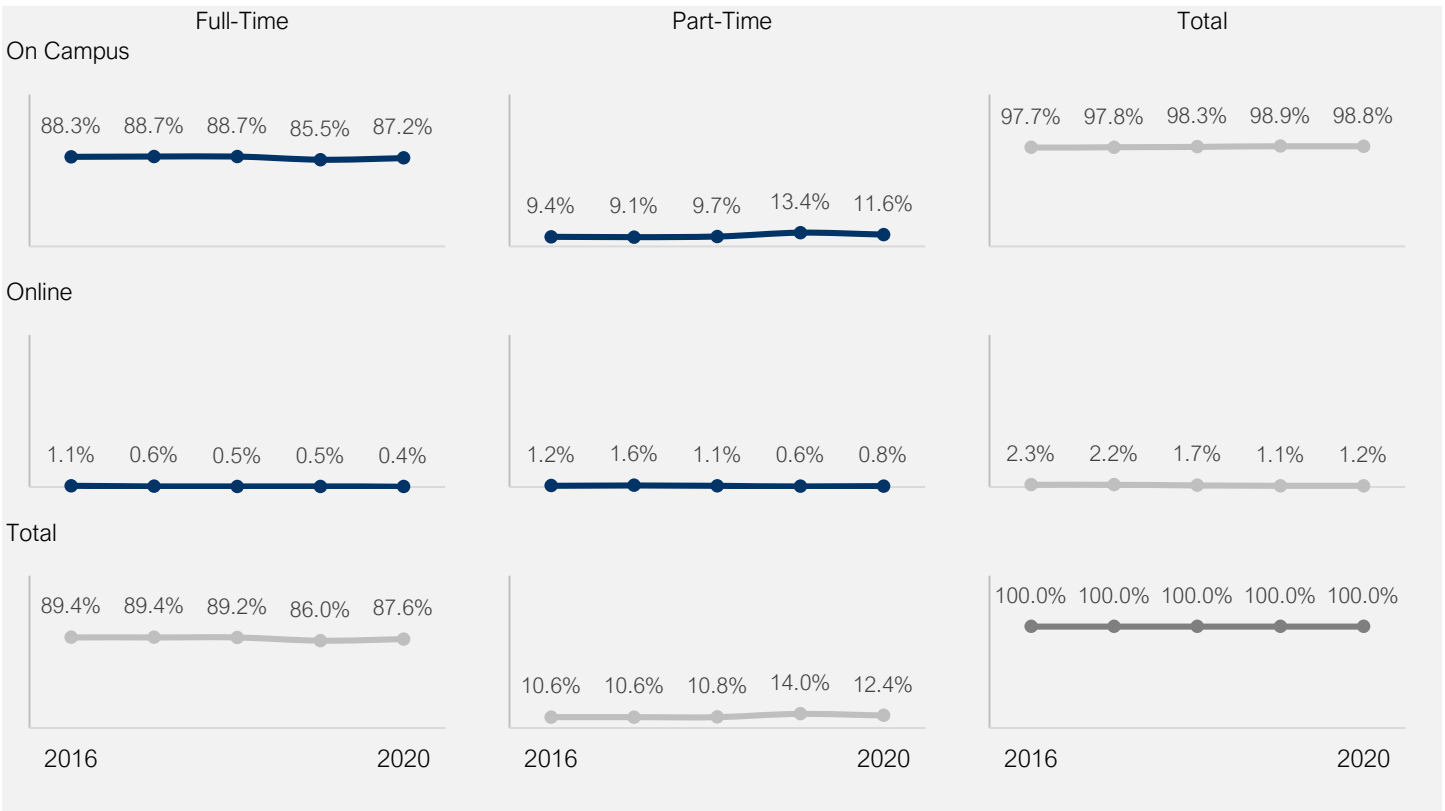


Exhibit NAU.FTSR.5: Percentage of First-Time Students by Credit Hours and Program Modality



Northern Arizona University

Exhibit NAU.FTSR.6: First-Time Student Retention Rate by Credit Hours and Program Modality

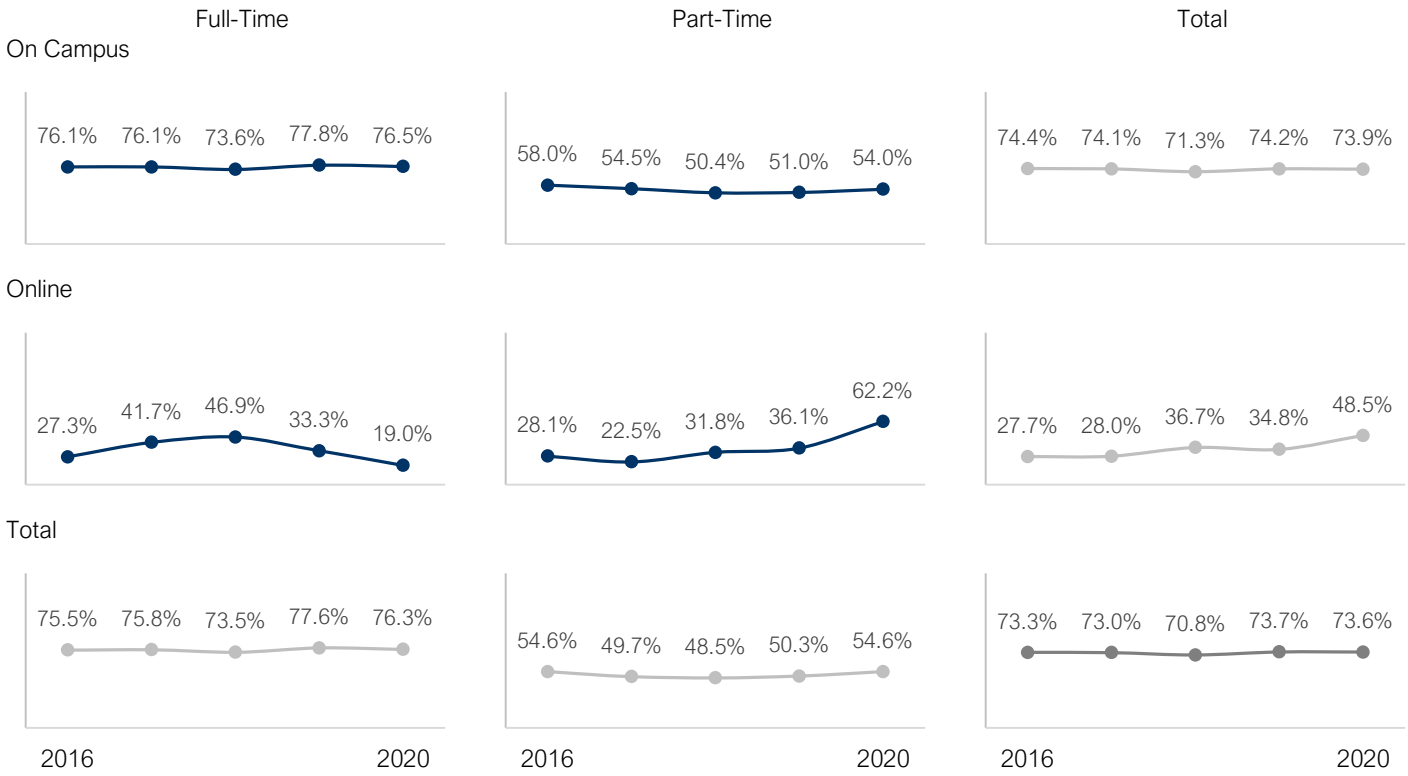
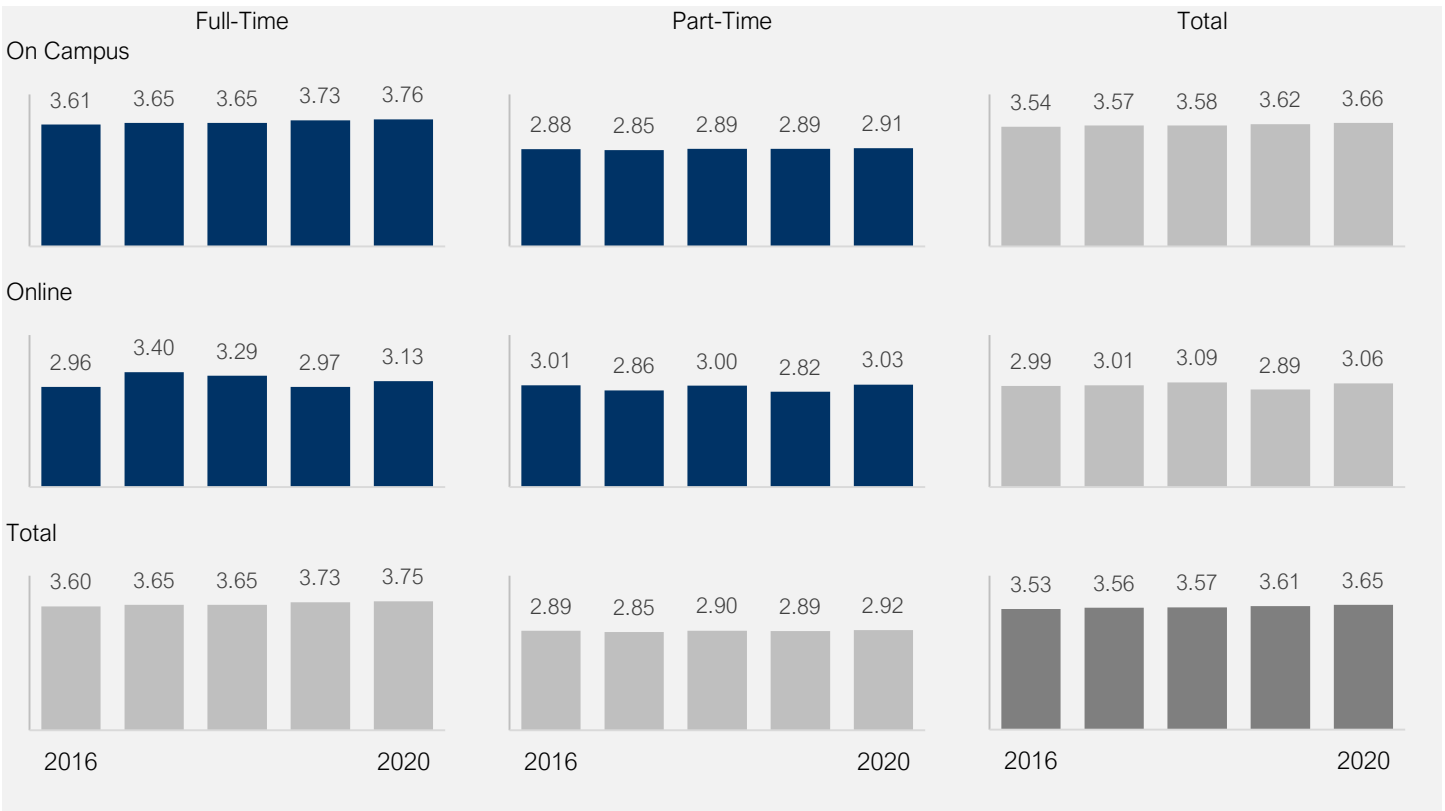


Exhibit NAU.FTSR.7: Average High School GPA of First-Time Students by Credit Hours and Program Modality



Note: Retention rates and average high school GPAs redacted where there are five or fewer students. Average high school GPAs calculated using only those students for which a high school GPA is available. All student GPAs adjusted to a four-point scale.

Exhibit NAU.FTSR.8: First-Time Student Headcount and Retention Rate By Classification of Instructional Programs

Classification of Instructional Program (CIP)	Students	Retention Rate
52 Business, Management, Marketing, and Related Support Services	856	72.3%
51 Health Professions and Related Programs	728	70.3%
26 Biological and Biomedical Sciences	626	73.2%
45 Social Sciences	437	74.4%
14 Engineering	382	77.0%
42 Psychology	367	77.4%
13 Education	333	76.6%
30 Interdisciplinary Studies	292	73.3%
31 Parks, Recreation, Leisure, and Fitness Studies	239	74.9%
03 Natural Resources and Conservation	218	71.6%
50 Visual and Performing Arts	218	74.3%
09 Communication, Journalism, and Related Programs	209	77.0%
40 Physical Sciences	188	76.6%
11 Computer and Information Sciences and Support Services	178	66.3%
16 Foreign Languages, Literatures, and Linguistics	89	92.1%
23 English Language, Literature, and Letters	79	73.4%
44 Public Administration and Social Service Professions	68	80.9%
32 Basic Skills, Developmental, and Remedial Education	39	76.9%
27 Mathematics and Statistics	32	81.3%
54 History	30	70.0%
22 Legal Professions and Studies	28	82.1%
05 Area, Ethnic, Cultural, Gender, and Group Studies	7	57.1%
24 Liberal Arts and Sciences, General Studies, and Humanities	7	0.0%
38 Philosophy and Religious Studies	4	75.0%
41 Science Technologies and Technicians	1	0.0%
01 Agriculture, Agriculture Operations, and Related Sciences		
04 Architecture and Related Services		
10 Communications Technologies, Technicians, and Support Services		
15 Engineering Technologies and Engineering Related Fields		
19 Family, Consumer, and Human Sciences		
25 Library Science		
29 Military Technologies and Applied Sciences		
43 Homeland Security, Law Enforcement, Firefighting, and Related Protective Services		
49 Transportation and Materials Moving		
60 Residency Programs		
(Unspecified)		

Note: Includes all Classification of Instructional Programs offered by Arizona public universities. Students may be counted in more than one program.

Northern Arizona University

Exhibit NAU.FTSR.9: First-Time Student Headcount and Retention Rate in Top 50 Academic Programs

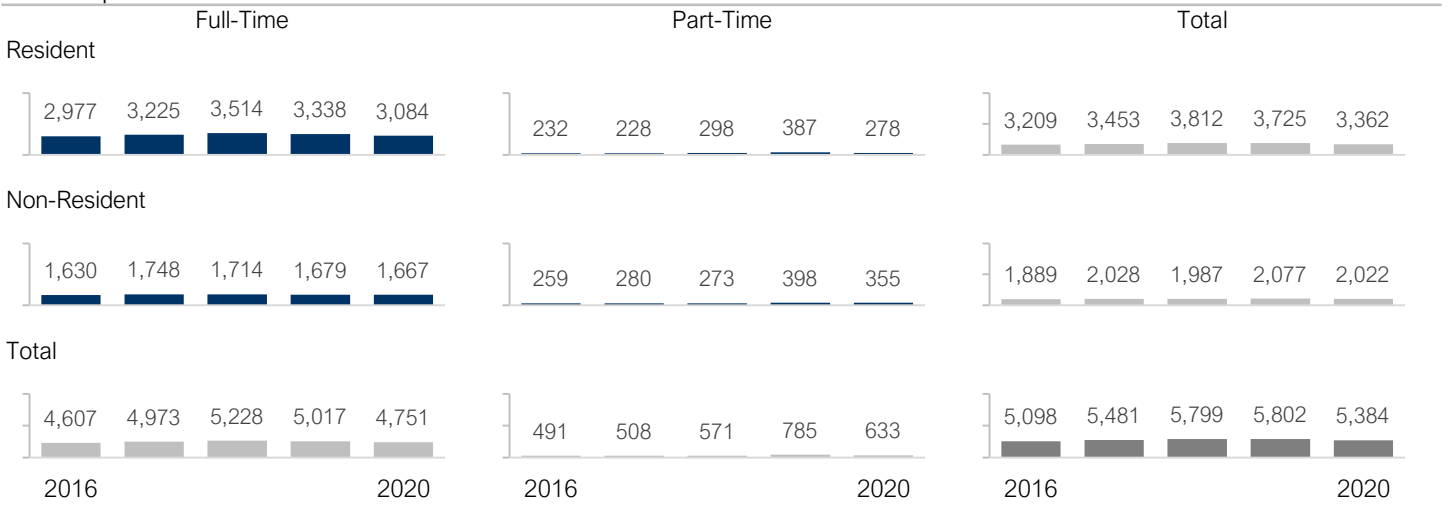
Academic Program	Students	Retention Rate
Nursing BSN	458	69.4%
Biomedical Science BS	337	75.7%
Business	301	69.1%
Criminology and Criminal Justice BS	283	76.0%
Biology BS	269	69.1%
Exploratory	255	73.3%
Exercise Science BS	225	74.2%
Psychology BS	187	77.5%
Psychological Sciences BS	177	77.4%
Mechanical Engineering BS	159	77.4%
Computer Science BSCS	145	66.9%
Elementary Education BSED	118	74.6%
Chemistry BS	97	80.4%
Hotel and Restaurant Management BS	93	75.3%
Marketing BSBA	88	78.4%
Finance BSBA	86	82.6%
Creative Media and Film BS	82	80.5%
Management BSBA	81	81.5%
Modern Languages BA	81	92.6%
Forestry BSF	79	62.0%
Business Economics BSBA	78	61.5%
English BA	75	74.7%
Dental Hygiene BSDH	75	62.7%
Engineering - Undecided	72	79.2%
Social Work BSW	68	80.9%
Environmental Sciences BS	64	73.4%
Health Sciences - Fitness Wellness BS	62	67.7%
Health Sciences - Public Health BS	54	75.9%
Visual Communication BFA	52	76.9%
Civil Engineering BS	46	69.6%
Interior Design BS	44	77.3%
Journalism BSJOUR	44	68.2%
Early Childhood Education & Early Childhood Special Education BSED	43	83.7%
Computer Engineering BS	41	75.6%
Accountancy BSACCY	41	73.2%
Theatre BA	41	70.7%
Political Science BA	40	85.0%
Program in Intensive English - Undergraduate	39	76.9%
Communication Sciences and Disorders BS	39	79.5%
Secondary Education - History and Social Studies BSED	37	75.7%
Environmental Engineering BS	36	83.3%
Astronomy BS	35	68.6%
Special and Elementary Education BSED	35	77.1%
Comparative Cultural Studies BA	34	79.4%
Environmental and Sustainability Studies BA	33	84.8%
Secondary Education - English BSED	33	72.7%
Political Science BS	32	62.5%
Physics and Astrophysics BS	32	71.9%
Mathematics BS	32	81.3%
Anthropology BA	32	53.1%

Note: Students may be counted in more than one program.

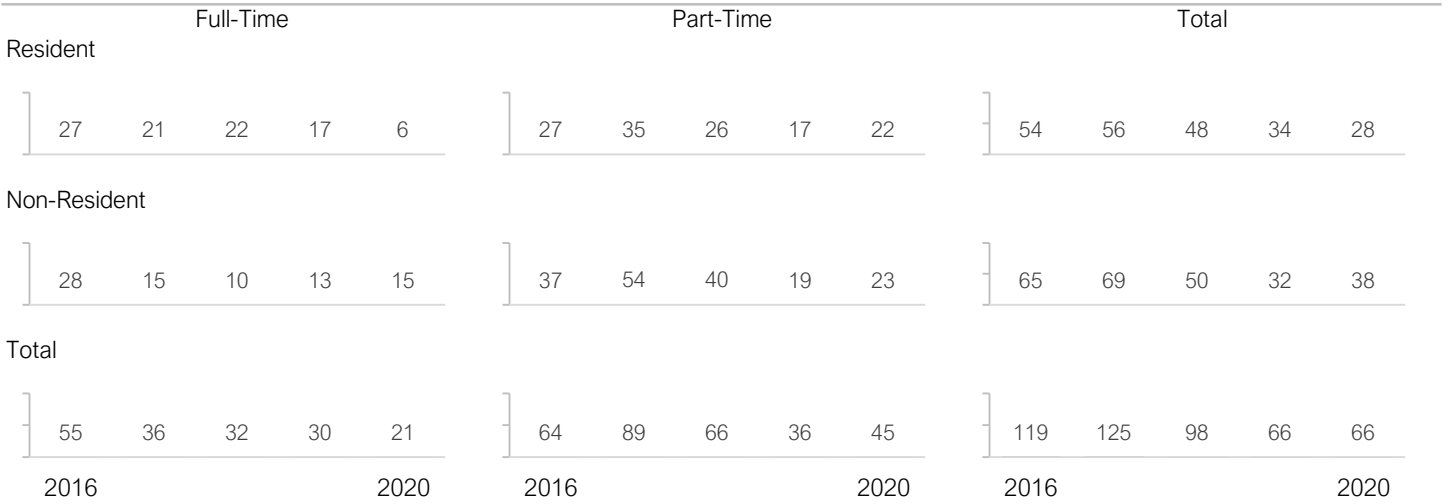
Northern Arizona University

Exhibit NAU.FTSR.10: First-Time Student Headcount Enrollment by Credit Hours and Arizona Residency

On Campus



Online



Total

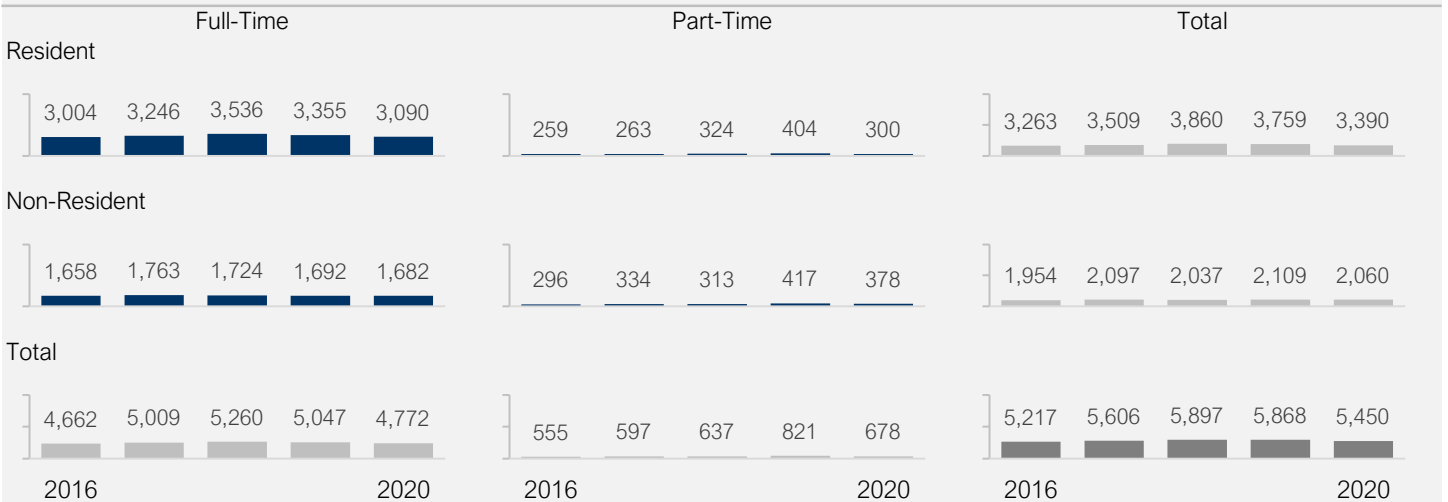
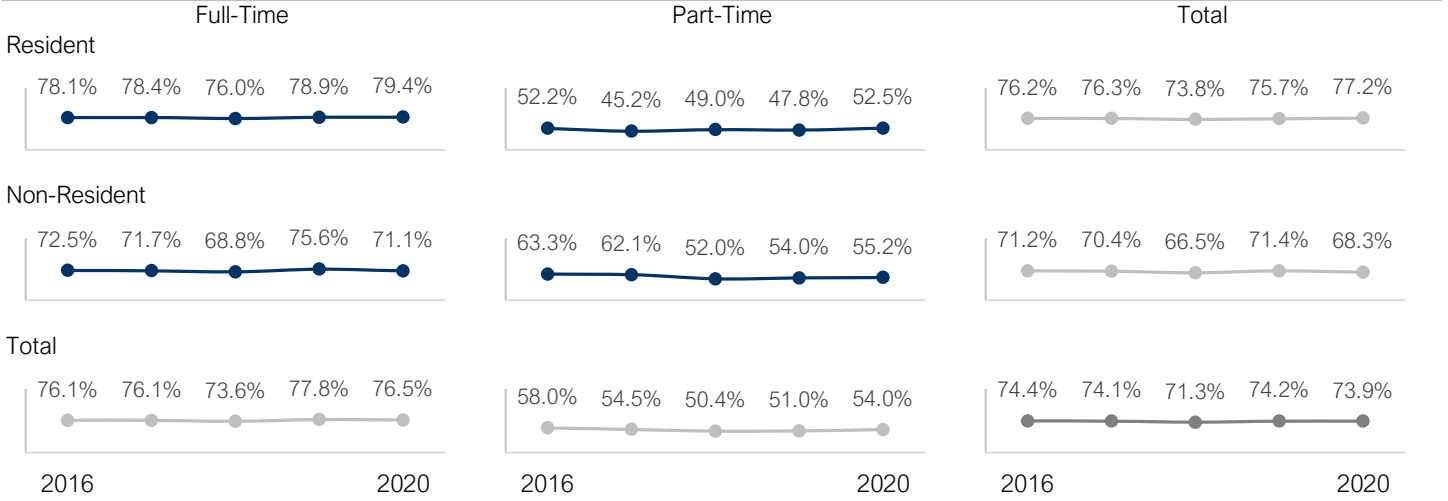
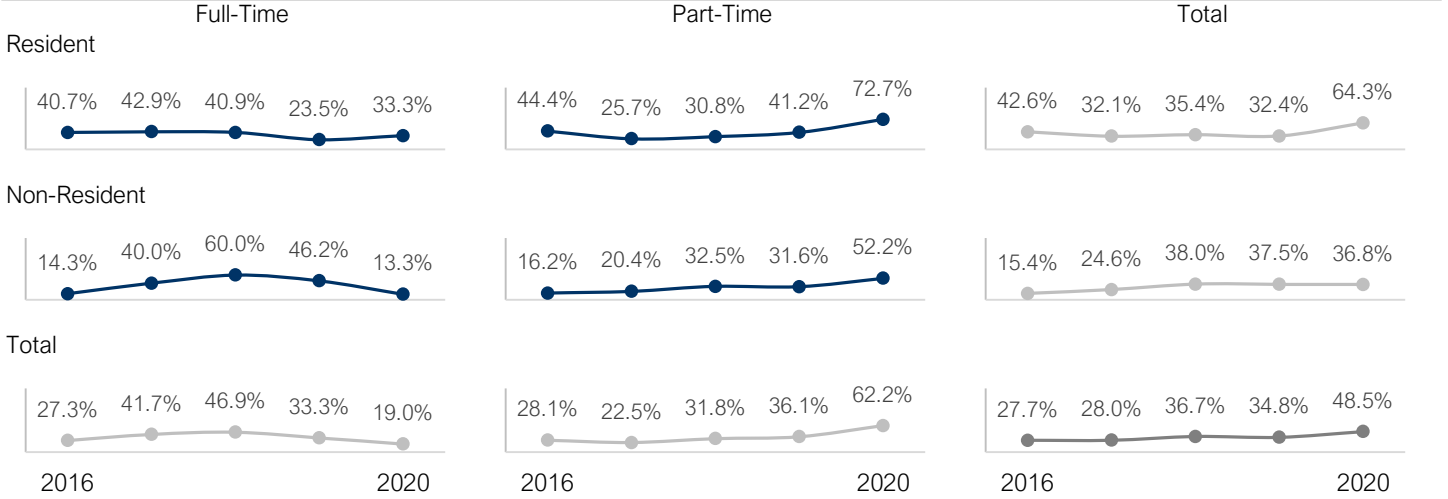


Exhibit NAU.FTSR.11: First-Time Student Retention Rate by Credit Hours and Arizona Residency

On Campus



Online



Total

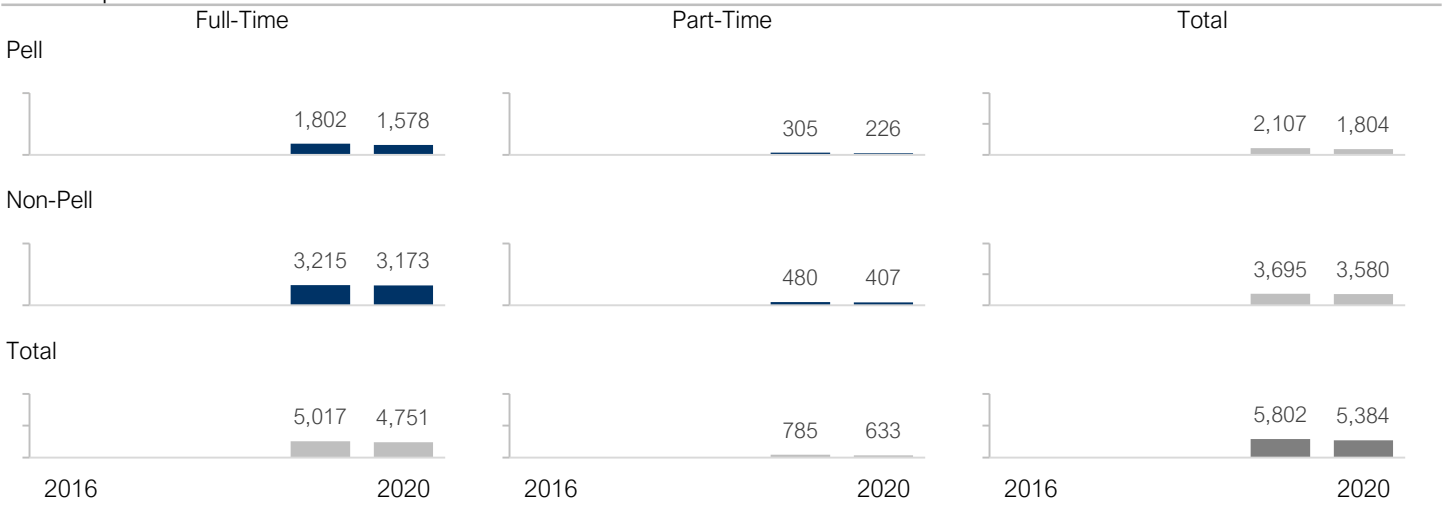


Note: Retention rates redacted where there are five or fewer students.

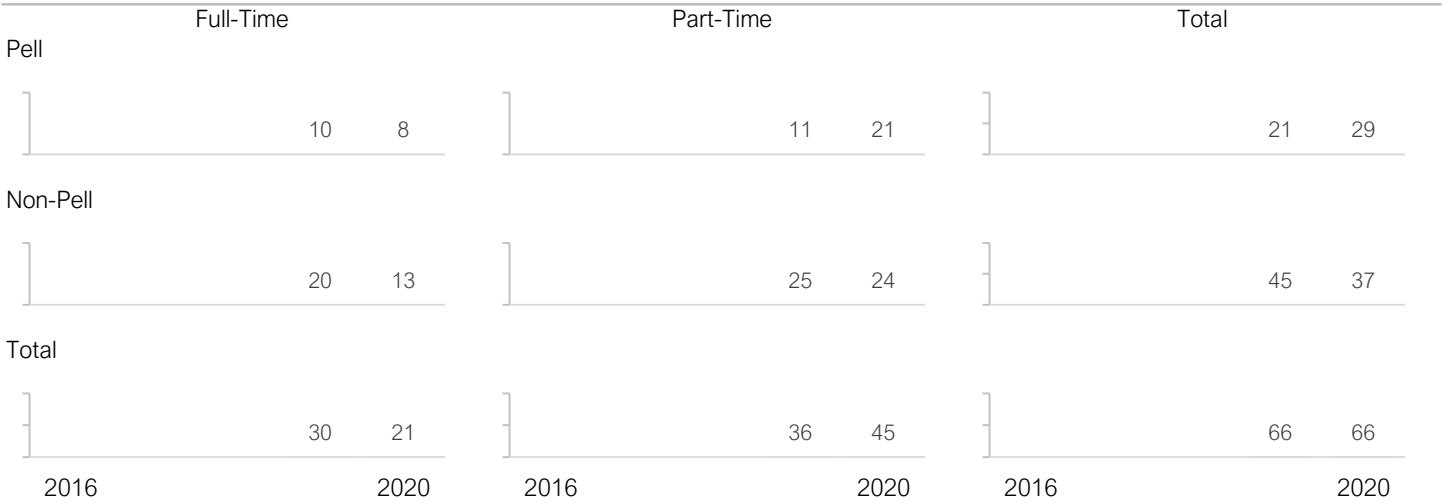
Northern Arizona University

Exhibit NAU.FTSR.12: First-Time Student Headcount Enrollment by Credit Hours and Pell Status

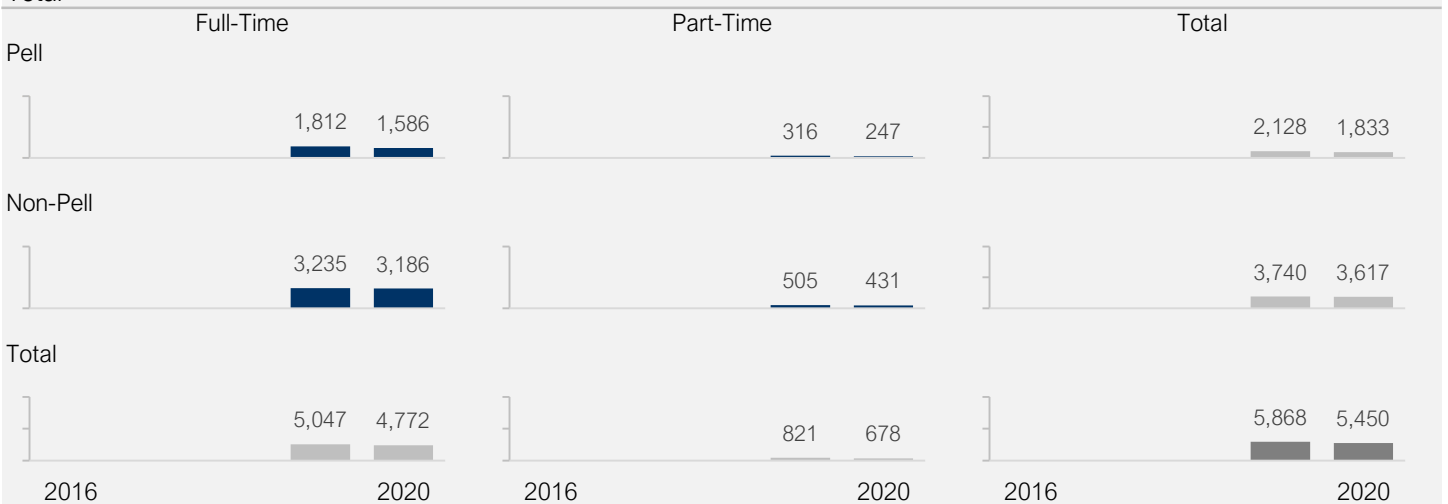
On Campus



Online



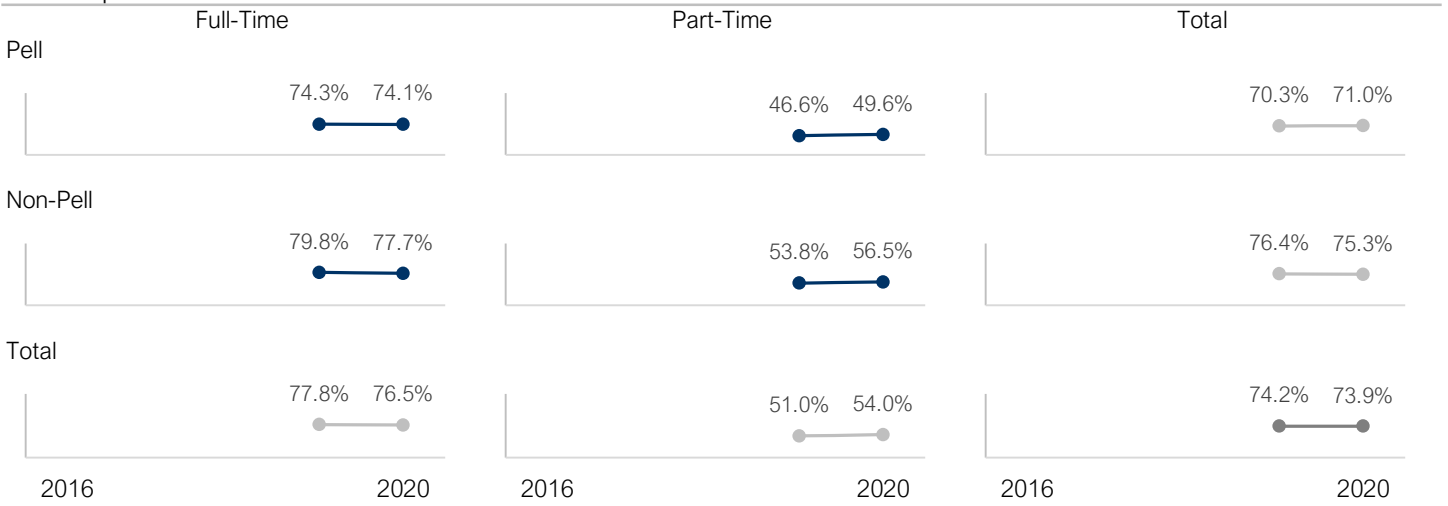
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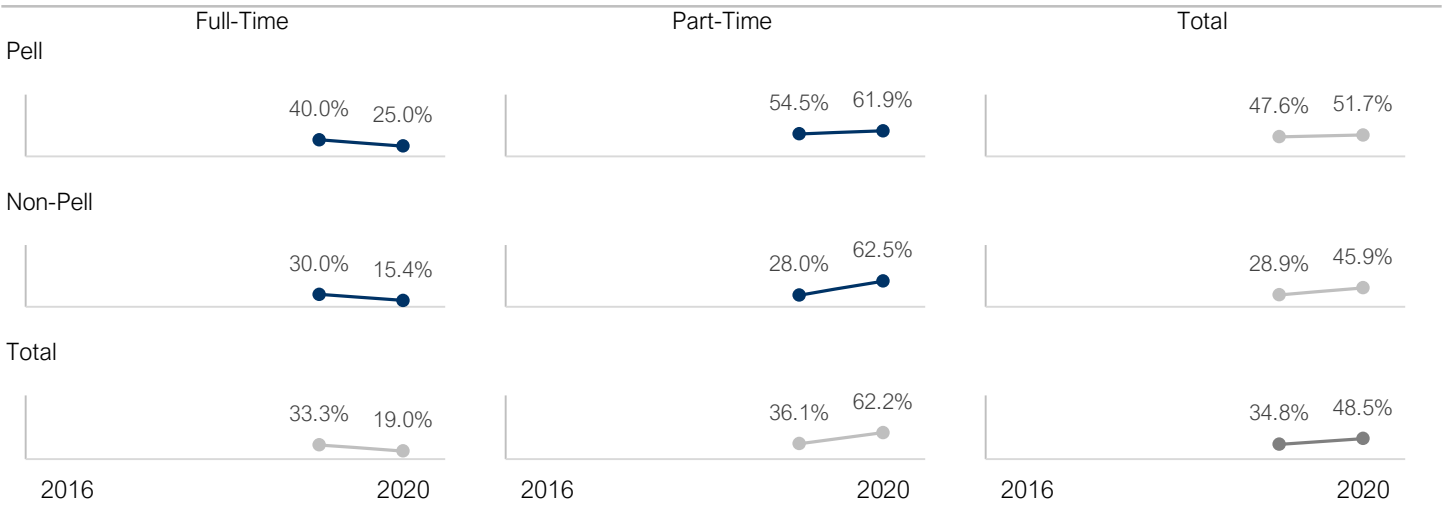
Northern Arizona University

Exhibit NAU.FTSR.13: First-Time Student Retention Rate by Credit Hours and Pell Status

On Campus



Online



Total

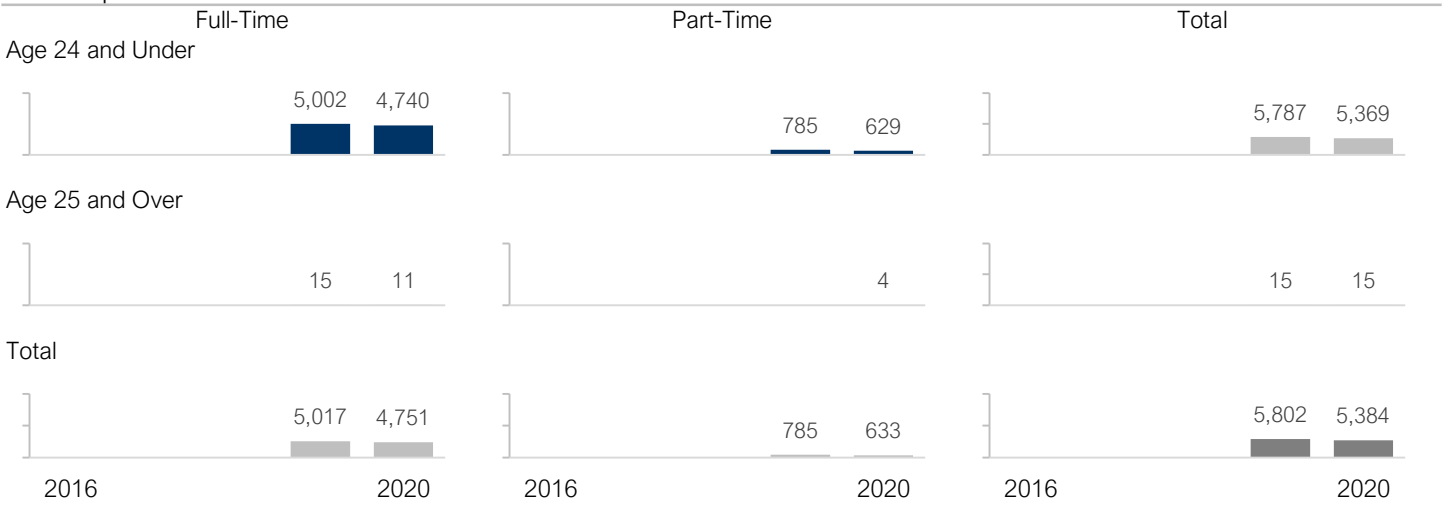


Note: Retention rates redacted where there are five or fewer students.

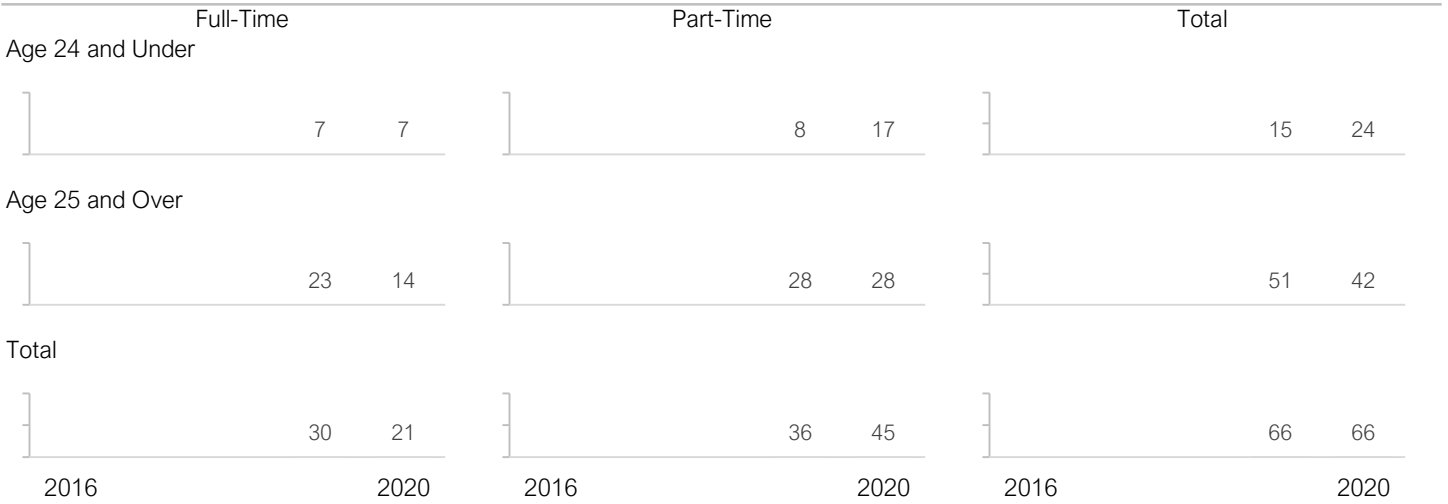
Northern Arizona University

Exhibit NAU.FTSR.14: First-Time Student Headcount Enrollment by Credit Hours and Age

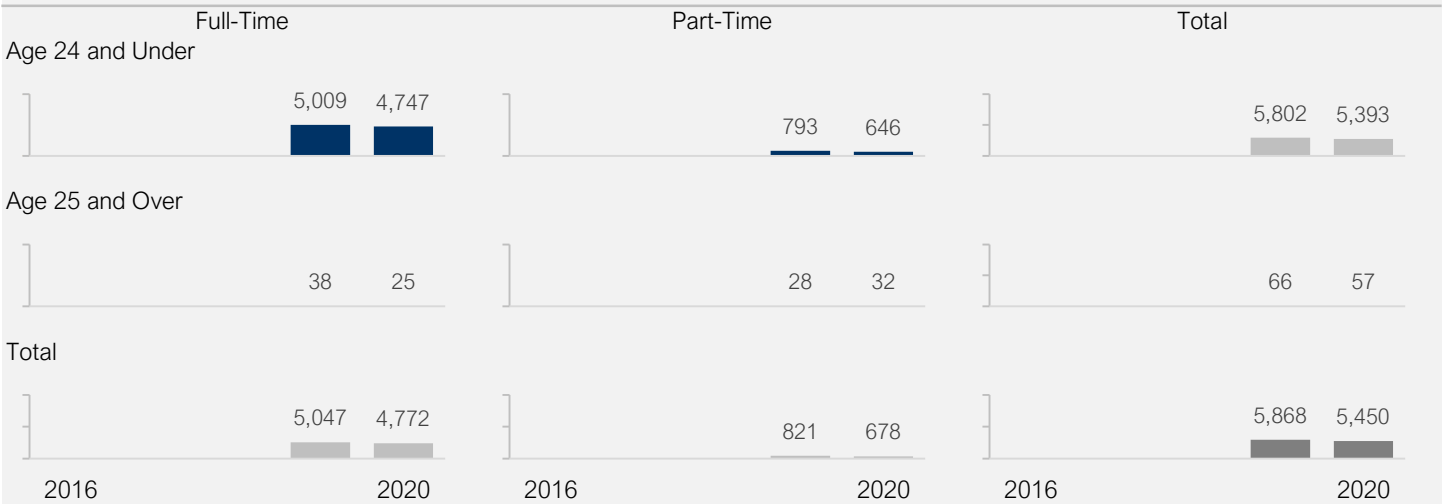
On Campus



Online



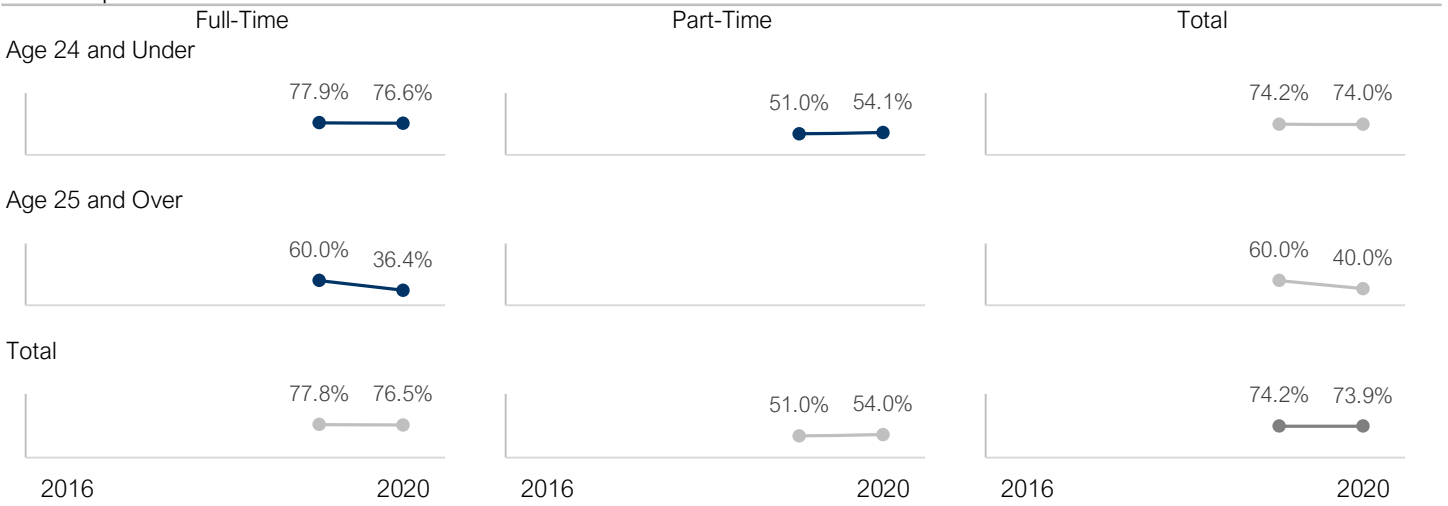
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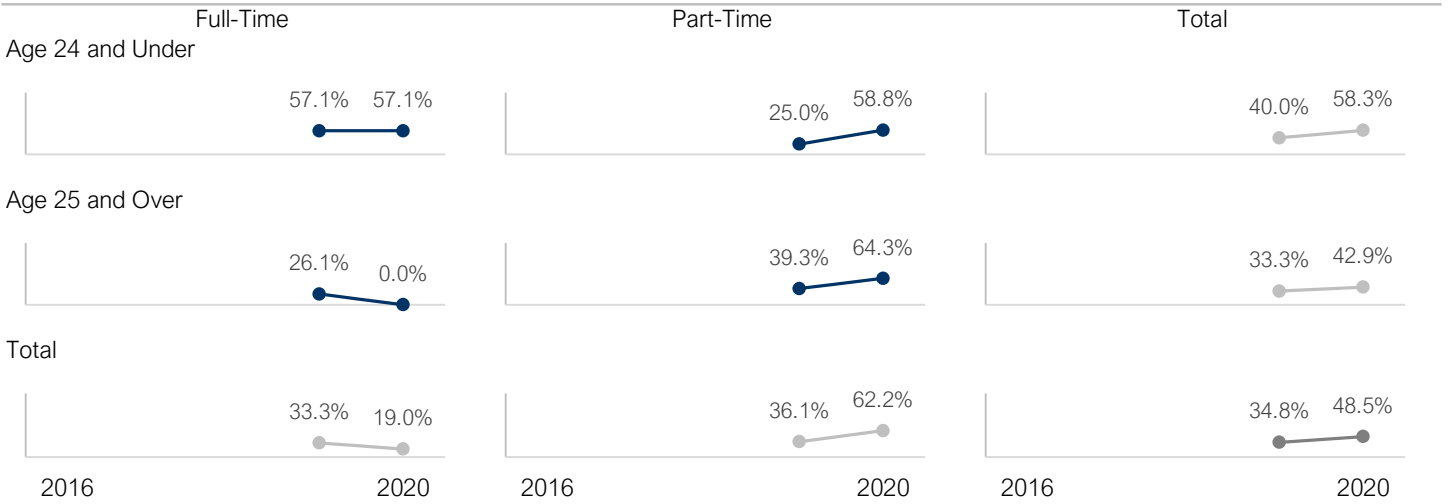
Northern Arizona University

Exhibit NAU.FTSR.15: First-Time Student Retention Rate by Credit Hours and Age

On Campus



Online



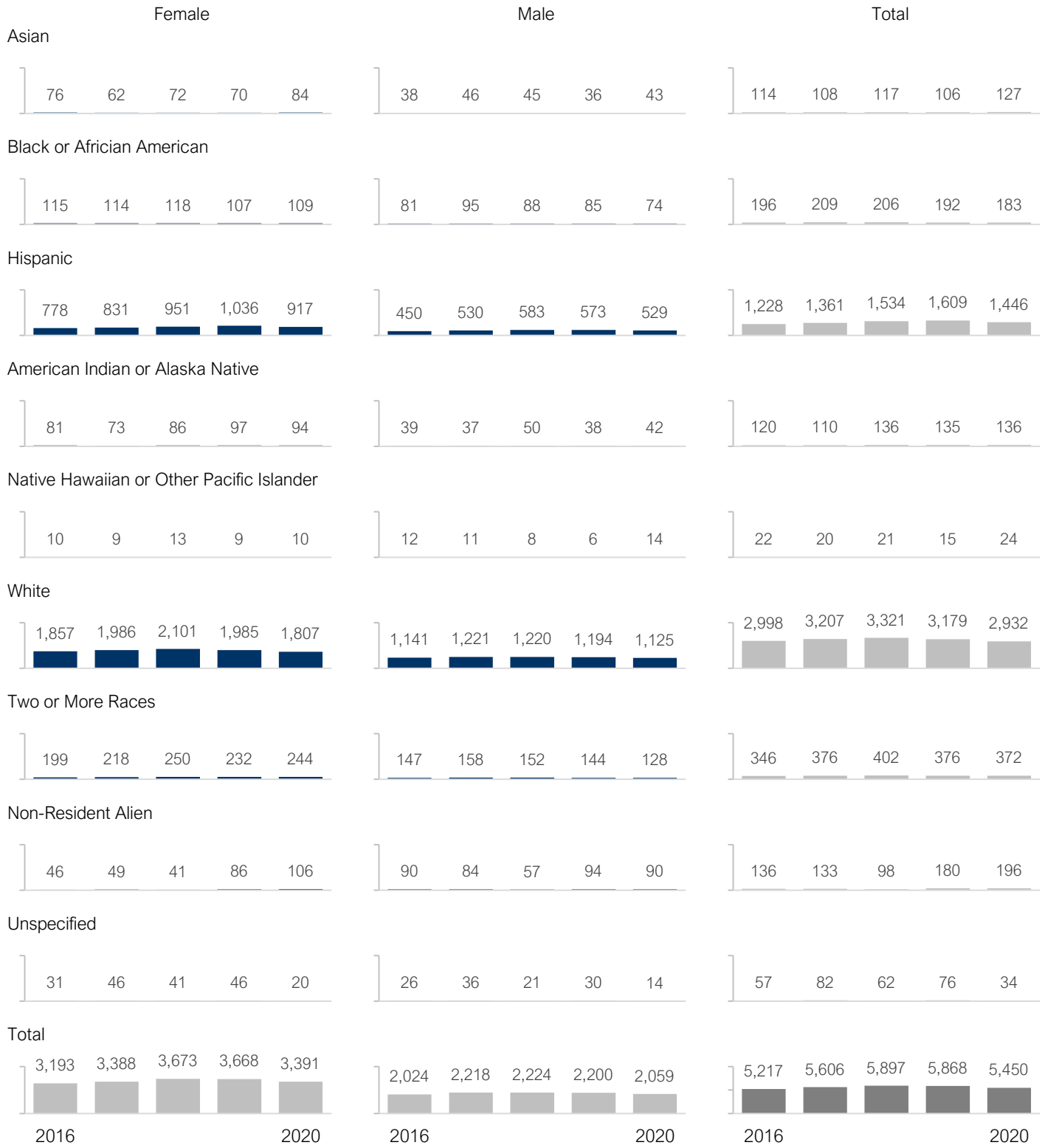
Total



Note: Retention rates redacted where there are five or fewer students.

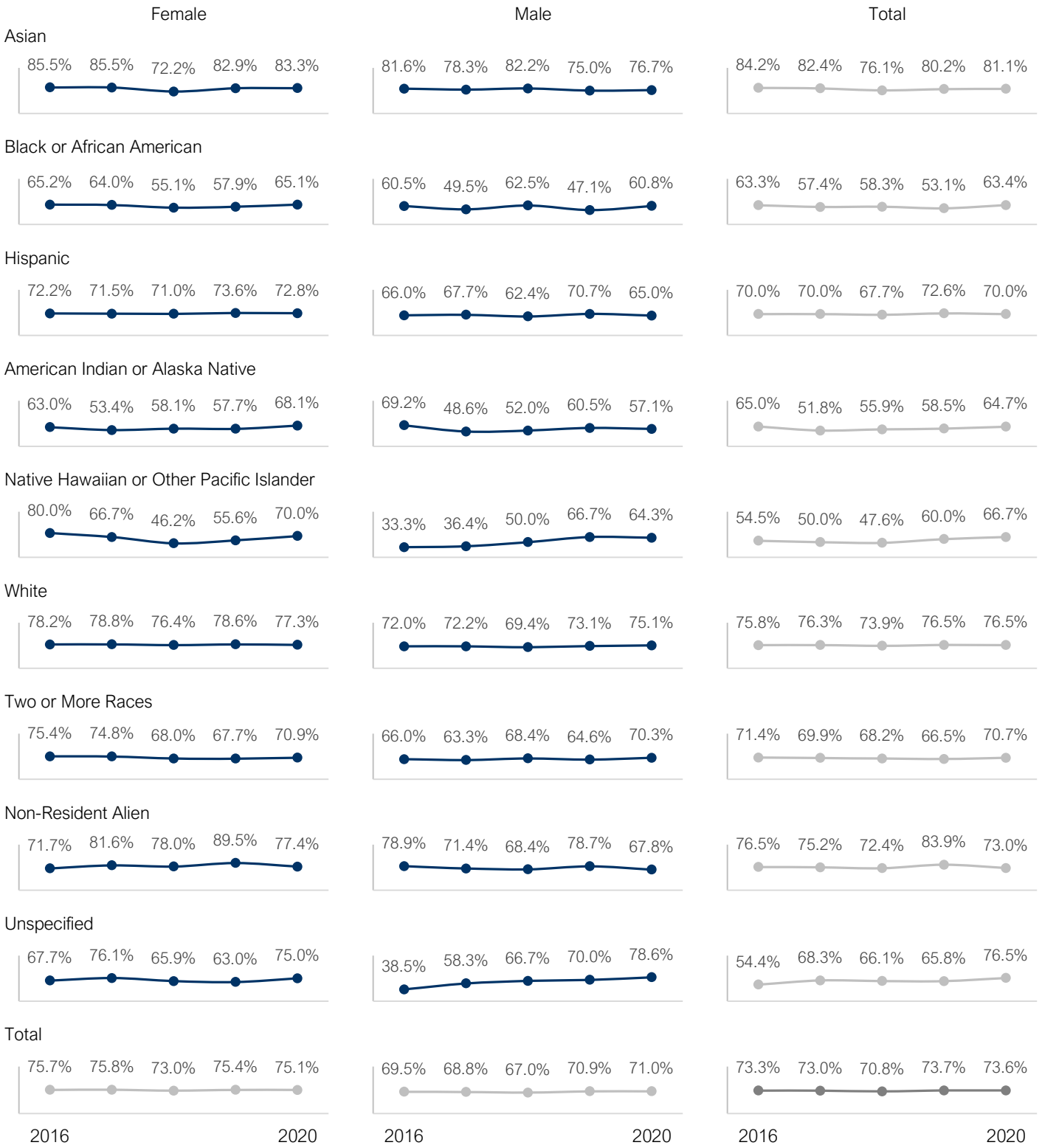
Northern Arizona University

Exhibit NAU.FTSR.16: First-Time Student Headcount Enrollment by Gender and Race Ethnicity



Northern Arizona University

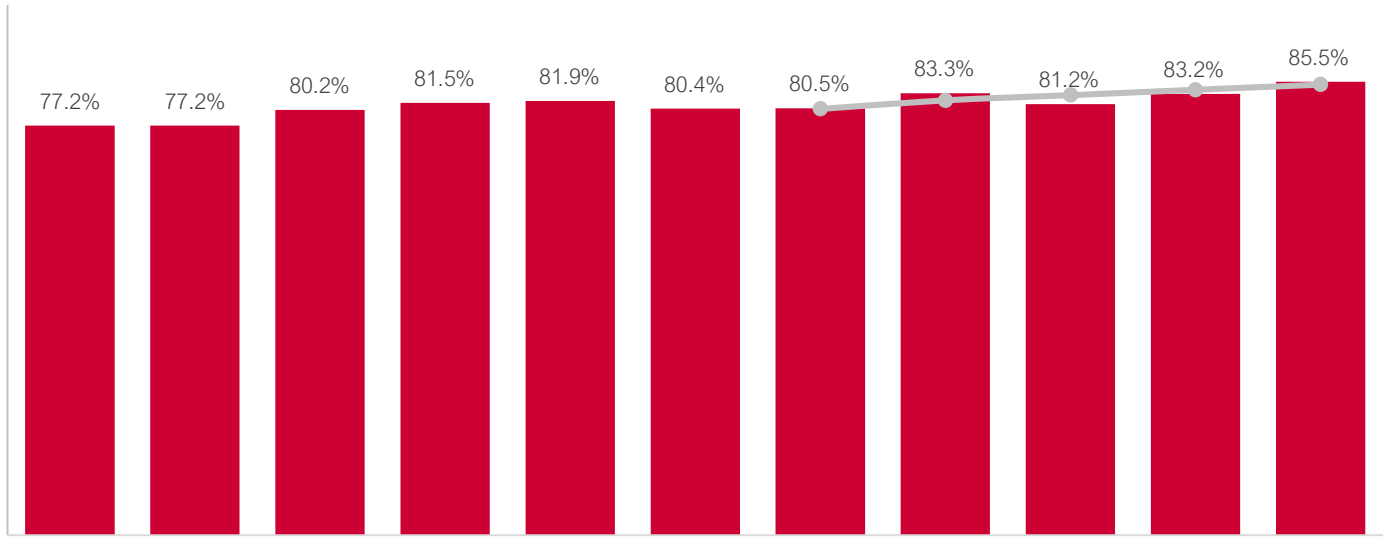
Exhibit NAU.FTSR.17: First-Time Student Retention Rate by Gender and Race Ethnicity



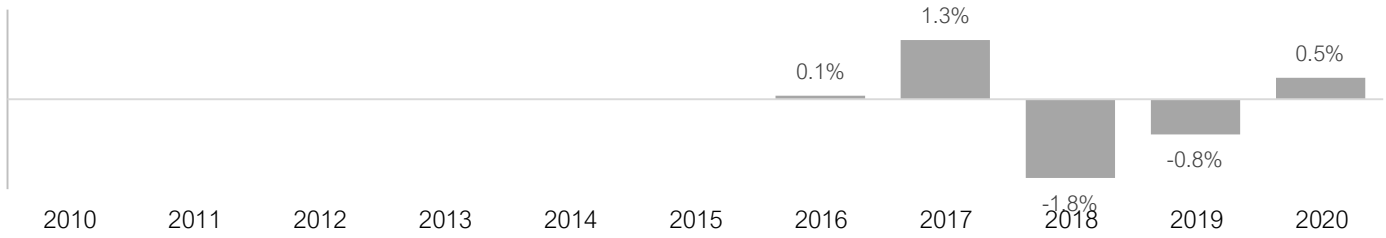
Note: Retention rates redacted where there are five or fewer students.

Exhibit UA.FTSR.1: First-Time, Full-Time Student Retention Rate and Goals

Retention Rates and Goals



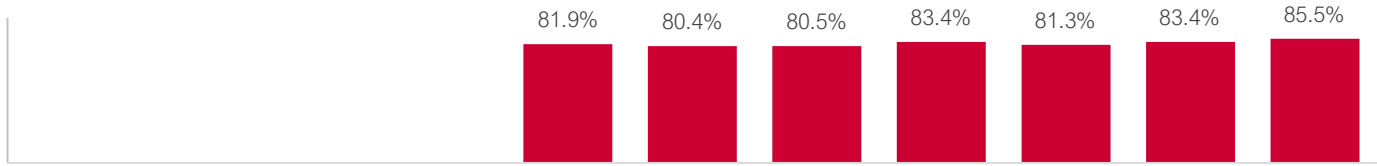
Actual to Goal Differences



University of Arizona

Exhibit UA.FTSR.2: First-Time, On-Campus Student Retention Rate

Full-Time Students



Part-Time Students

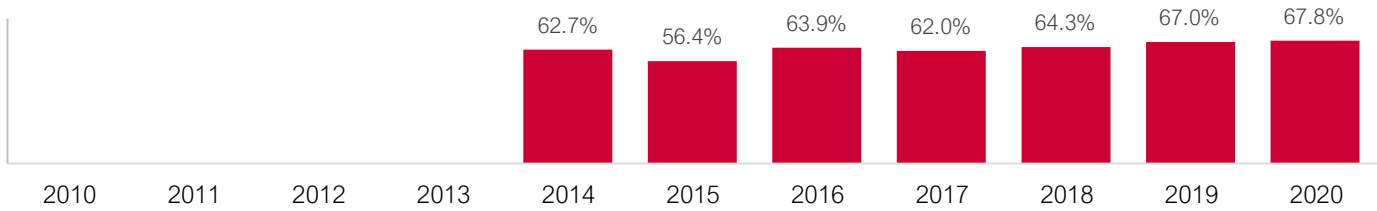


Exhibit UA.FTSR.3: First-Time Student Headcount, Retention Rate and Average High School GPA by Geographic Site

Geographic Site	First-Time Students	Retention Rate	Average High School GPA
UA Tucson	7,594	81.8%	3.41
UA North Valley - Paradise Valley Community College	1		
Arizona Western College			
UA at Mesa Community College			
UA at Pima Community College East			
UA Chandler			
UA Community Campus - Bridge			
UA Community Campus - High School			
UA Distance			
UA Douglas			
UA Flowing Wells High School			
UA Gilbert University Center			
UA Phoenix Biomedical Campus			
UA Santa Cruz			
UA Sierra Vista			
UA Online	69	42.0%	3.03
UA Global Direct			

Note: Retention rates and average high school GPAs redacted where there are five or fewer students. Average high school GPAs calculated using only those students for which a high school GPA is available. All student GPAs adjusted to a four-point scale.

Exhibit UA.FTSR.4: First-Time Student Headcount Enrollment by Credit Hours and Program Modality

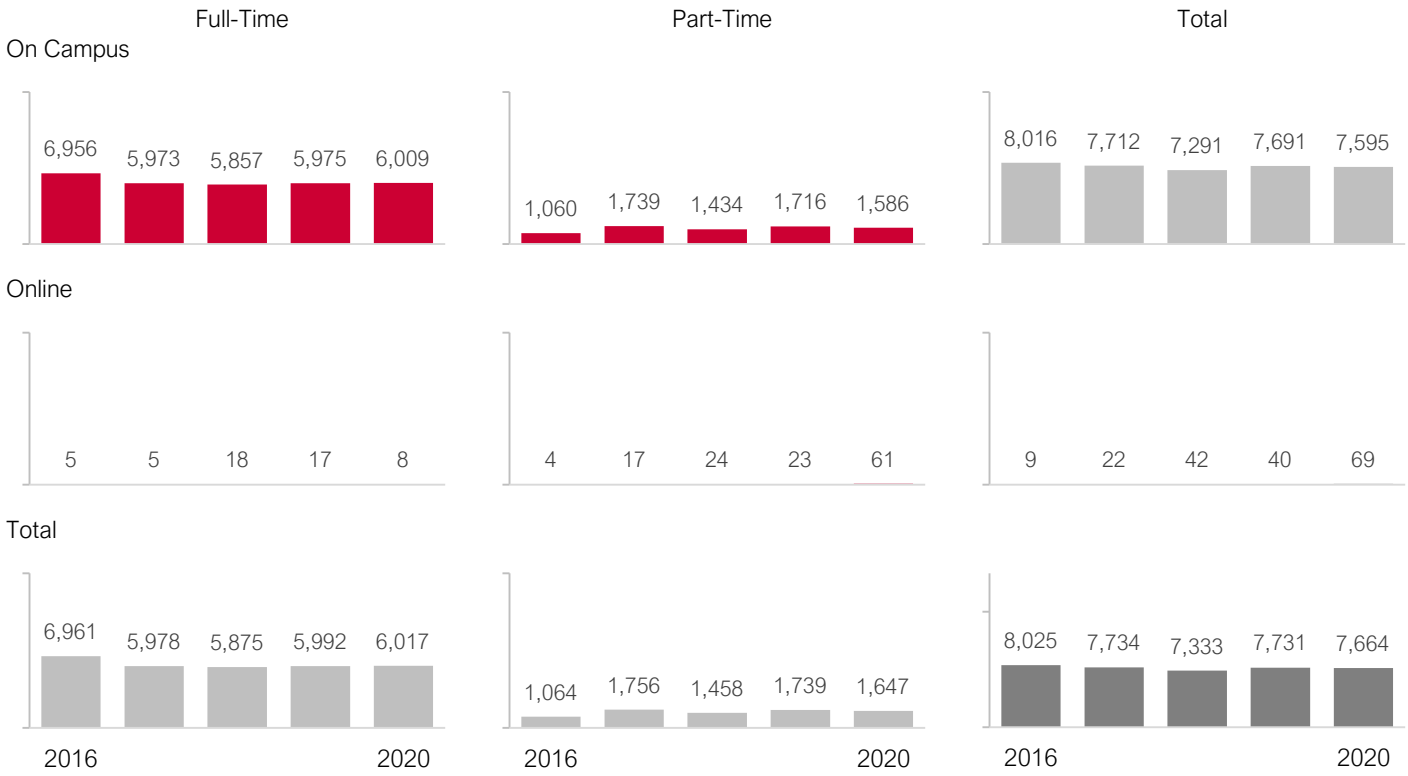
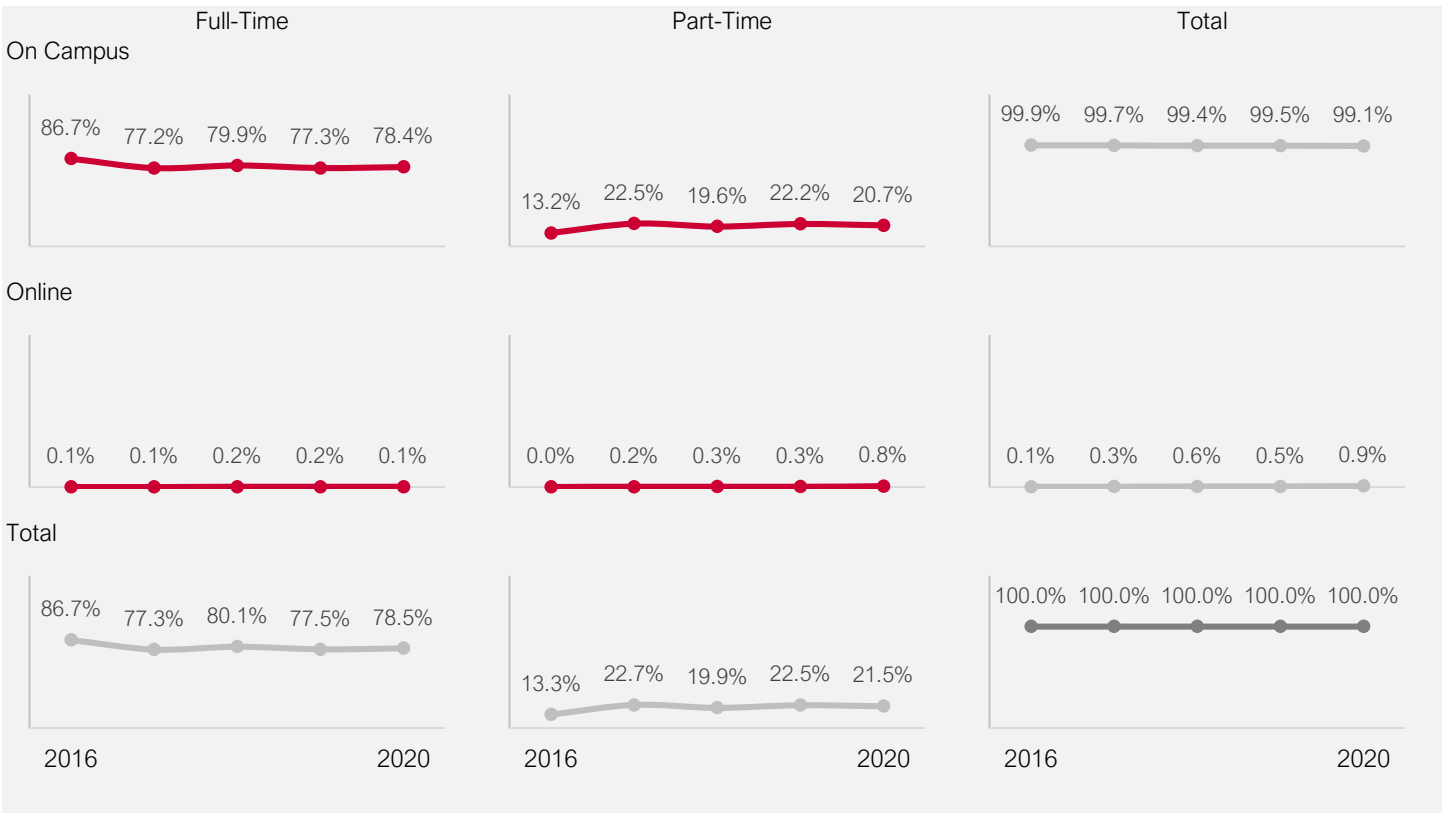


Exhibit UA.FTSR.5: Percentage of First-Time Students by Credit Hours and Program Modality



University of Arizona

Exhibit UA.FTSR.6: First-Time Student Retention Rate by Credit Hours and Program Modality

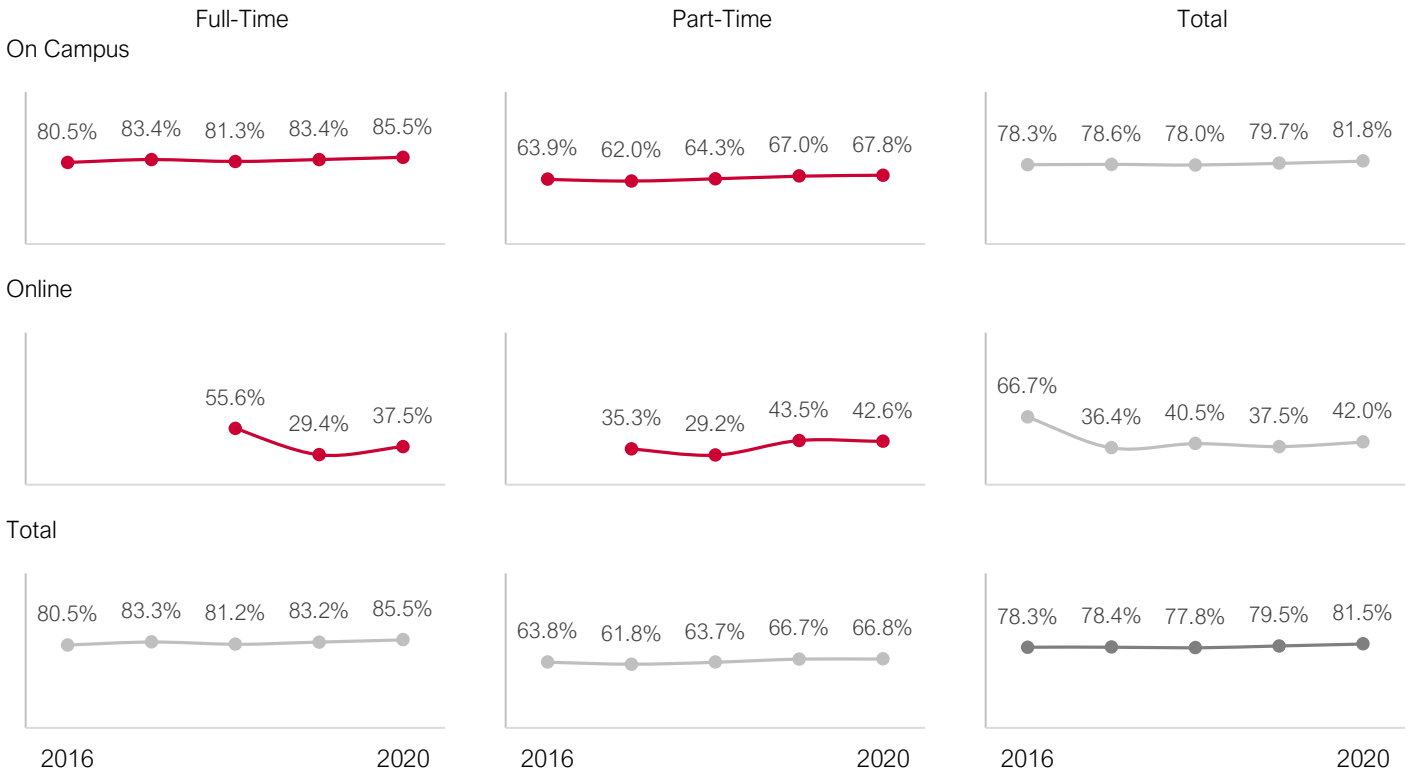
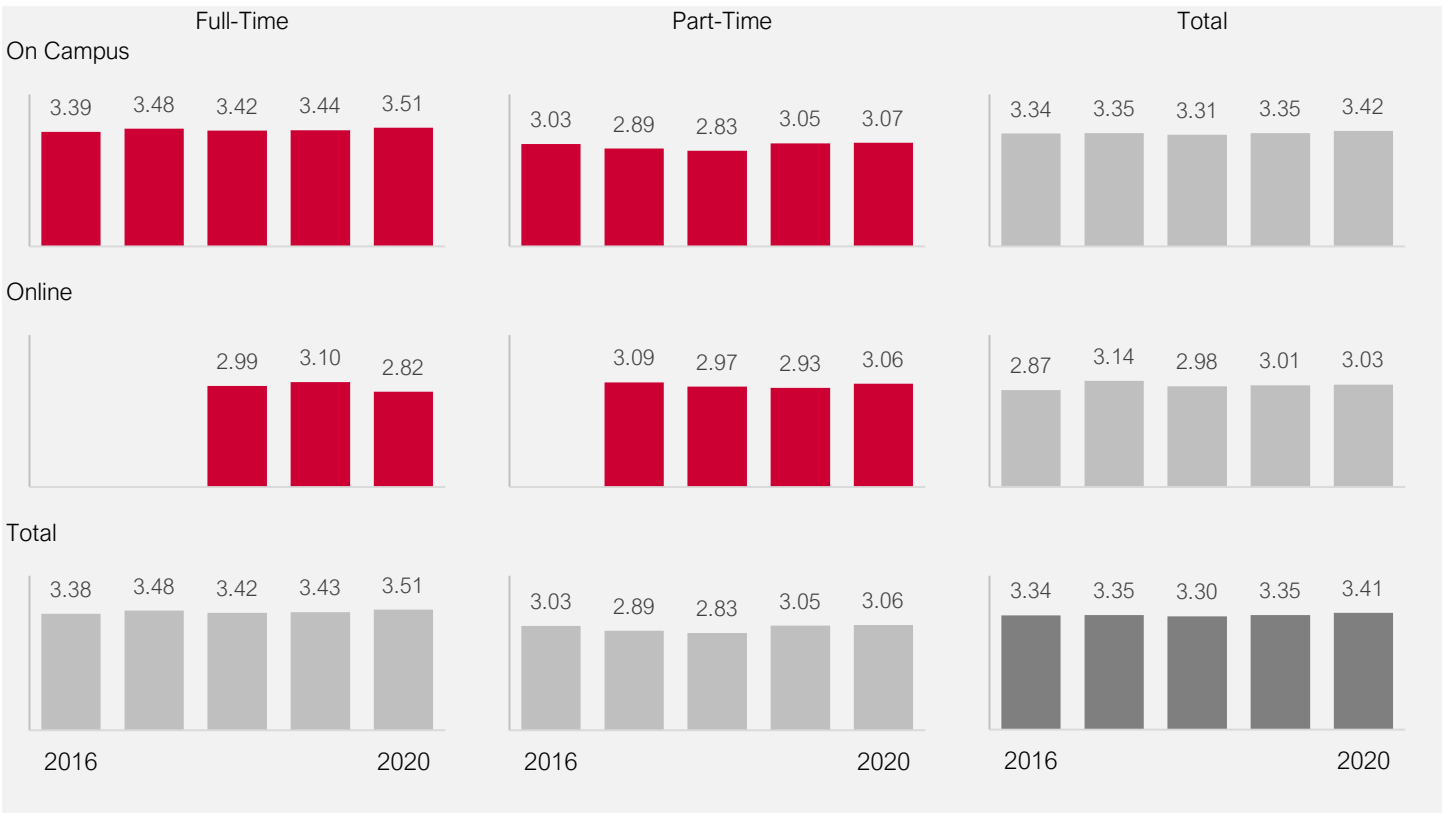


Exhibit UA.FTSR.7: Average High School GPA of First-Time Students by Credit Hours and Program Modality



Note: Retention rates and average high school GPAs redacted where there are five or fewer students. Average high school GPAs calculated using only those students for which a high school GPA is available. All student GPAs adjusted to a four-point scale.

University of Arizona

Exhibit UA.FTSR.8: First-Time Student Headcount and Retention Rate By Classification of Instructional Programs

Classification of Instructional Program (CIP)	Students	Retention Rate
52 Business, Management, Marketing, and Related Support Services	1,524	80.2%
26 Biological and Biomedical Sciences	1,305	85.4%
24 Liberal Arts and Sciences, General Studies, and Humanities	730	76.8%
14 Engineering	614	91.4%
51 Health Professions and Related Programs	577	87.2%
42 Psychology	427	75.2%
11 Computer and Information Sciences and Support Services	367	83.1%
40 Physical Sciences	300	83.3%
50 Visual and Performing Arts	280	87.5%
45 Social Sciences	209	73.7%
30 Interdisciplinary Studies	185	73.5%
09 Communication, Journalism, and Related Programs	172	80.2%
04 Architecture and Related Services	154	77.9%
22 Legal Professions and Studies	141	76.6%
13 Education	136	80.1%
27 Mathematics and Statistics	103	92.2%
03 Natural Resources and Conservation	101	84.2%
16 Foreign Languages, Literatures, and Linguistics	77	79.2%
01 Agriculture, Agriculture Operations, and Related Sciences	65	83.1%
05 Area, Ethnic, Cultural, Gender, and Group Studies	61	77.0%
23 English Language, Literature, and Letters	60	76.7%
54 History	35	68.6%
19 Family, Consumer, and Human Sciences	31	83.9%
44 Public Administration and Social Service Professions	10	100.0%
38 Philosophy and Religious Studies	9	77.8%
29 Military Technologies and Applied Sciences	1	100.0%
31 Parks, Recreation, Leisure, and Fitness Studies	1	100.0%
41 Science Technologies and Technicians	1	100.0%
10 Communications Technologies, Technicians, and Support Services		
15 Engineering Technologies and Engineering Related Fields		
25 Library Science		
32 Basic Skills, Developmental, and Remedial Education		
43 Homeland Security, Law Enforcement, Firefighting, and Related Protective Services		
49 Transportation and Materials Moving		
60 Residency Programs		
(Unspecified)	358	69.3%

Note: Includes all Classification of Instructional Programs offered by Arizona public universities. Students may be counted in more than one program.

University of Arizona

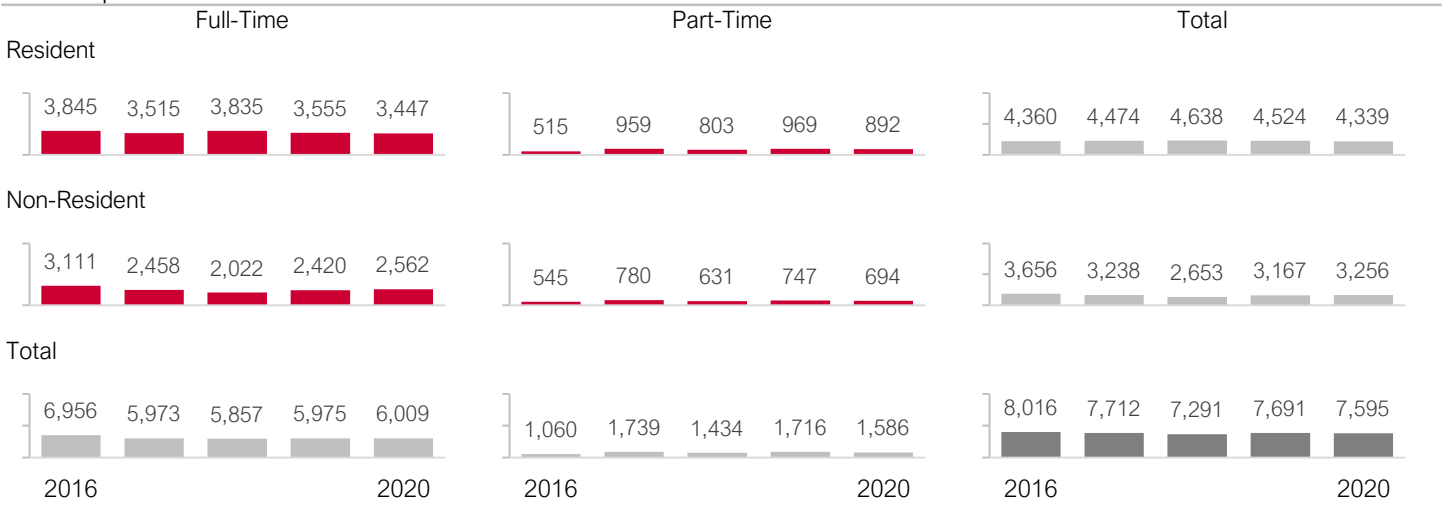
Exhibit UA.FTSR.9: First-Time Student Headcount and Retention Rate in Top 50 Academic Programs

Academic Program	Students	Retention Rate
Pre-Business	1,488	80.3%
No Major Selected A-Center	708	76.8%
No Major Selected Engineering	556	91.0%
Major in Physiology and Medical Sciences	421	87.9%
Major in Biology	365	79.5%
Pre-Computer Science	330	83.6%
Major in Psychology	288	73.6%
Pre-Nursing	200	90.0%
Pre-Neuroscience and Cognitive Science	176	83.5%
Major in Veterinary Science	155	67.7%
Major in Criminal Justice Studies	147	66.7%
Pre-Public Health	146	85.6%
Major in Biochemistry	144	87.5%
Major in Law	141	76.6%
Pre-Psychological Science	139	78.4%
Pre-Architecture	134	76.1%
Major in Molecular and Cellular Biology	132	92.4%
Pre-Pharmaceutical Sciences	129	93.8%
Major in Communication	109	79.8%
Major in Political Science	99	77.8%
Major in Physics	99	81.8%
Major in Astronomy	88	84.1%
Major in Nutritional Sciences	78	84.6%
Major in Mathematics	74	89.2%
Major in Studio Art	68	83.8%
Major in Chemistry	65	78.5%
Major in Film and Television	64	93.8%
Major in Journalism	63	81.0%
Major in Environmental Science	60	81.7%
No Major Selected Science	51	58.8%
Pre-Elementary Education	51	82.4%
Major in Care, Health and Society	50	76.0%
Pre-Economics	40	70.0%
No Major Selected Soc Beh Sci	40	77.5%
Major in English	39	76.9%
Major in Dance	39	100.0%
Major in Speech, Language and Hearing Sciences	38	81.6%
Major in Sociology	36	72.2%
Major in Geosciences	36	91.7%
Major in History	35	68.6%
Major in Animal Sciences	35	82.9%
Major in Philosophy, Politics, Economics and Law	35	80.0%
Major in General Studies	34	73.5%
Major in Microbiology	34	85.3%
Pre-Retailing & Consumer Science	32	75.0%
Major in Performance	29	79.3%
Major in Statistics and Data Science	29	100.0%
Pre-Family Studies & Human Development	28	85.7%
Major in Spanish	26	69.2%
Major in Anthropology	26	69.2%

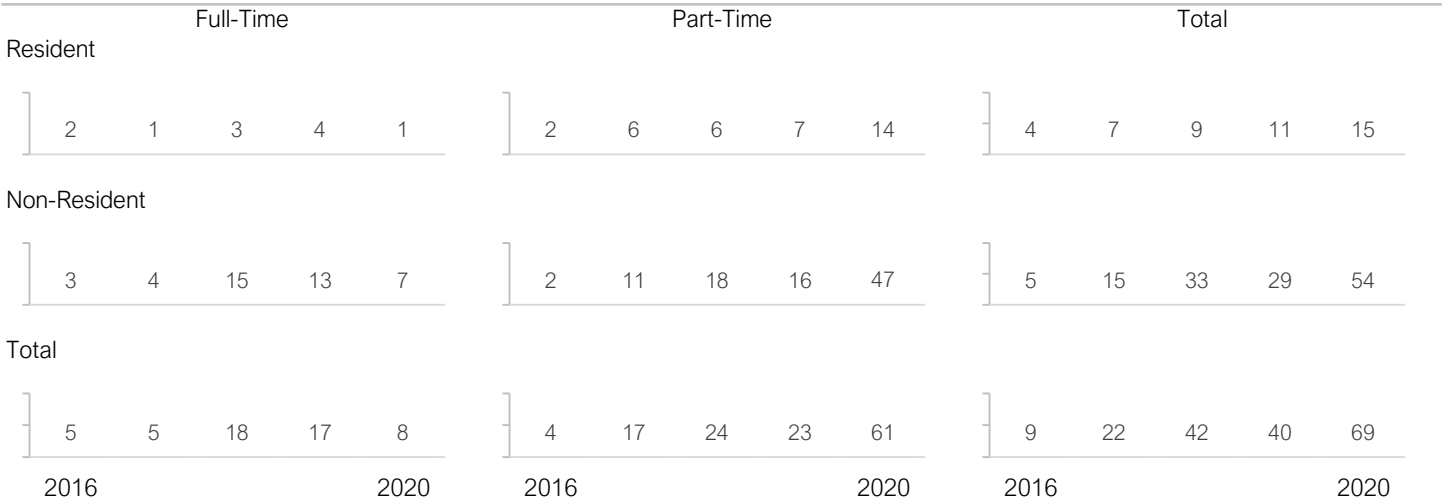
Note: Students may be counted in more than one program.

Exhibit UA.FTSR.10: First-Time Student Headcount Enrollment by Credit Hours and Arizona Residency

On Campus



Online

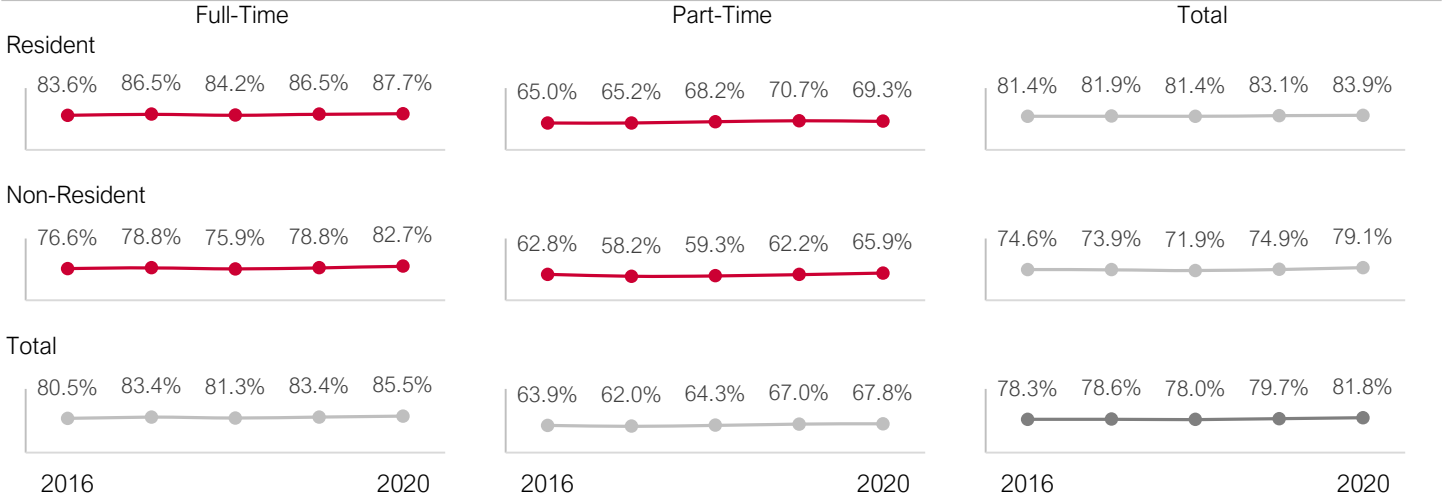


Total

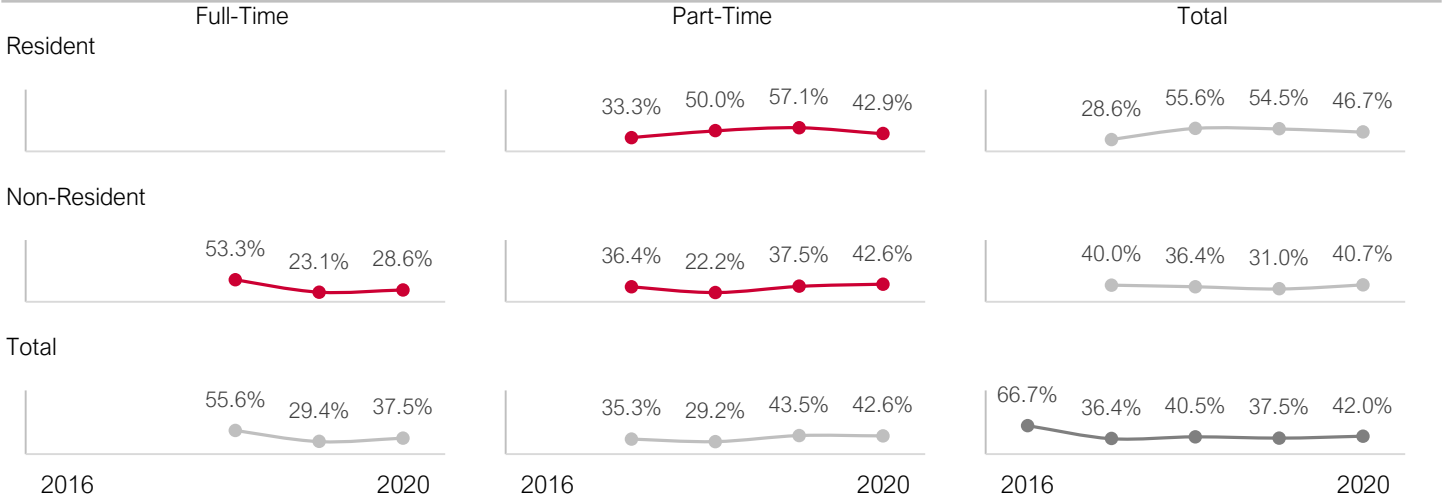


Exhibit UA.FTSR.11: First-Time Student Retention Rate by Credit Hours and Arizona Residency

On Campus



Online



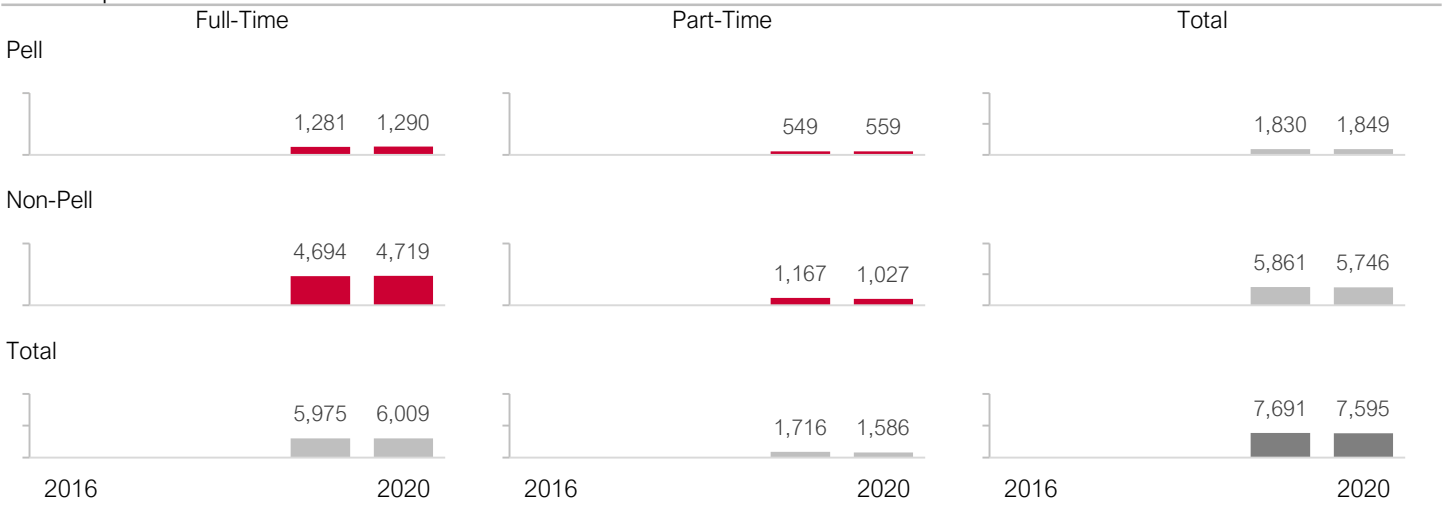
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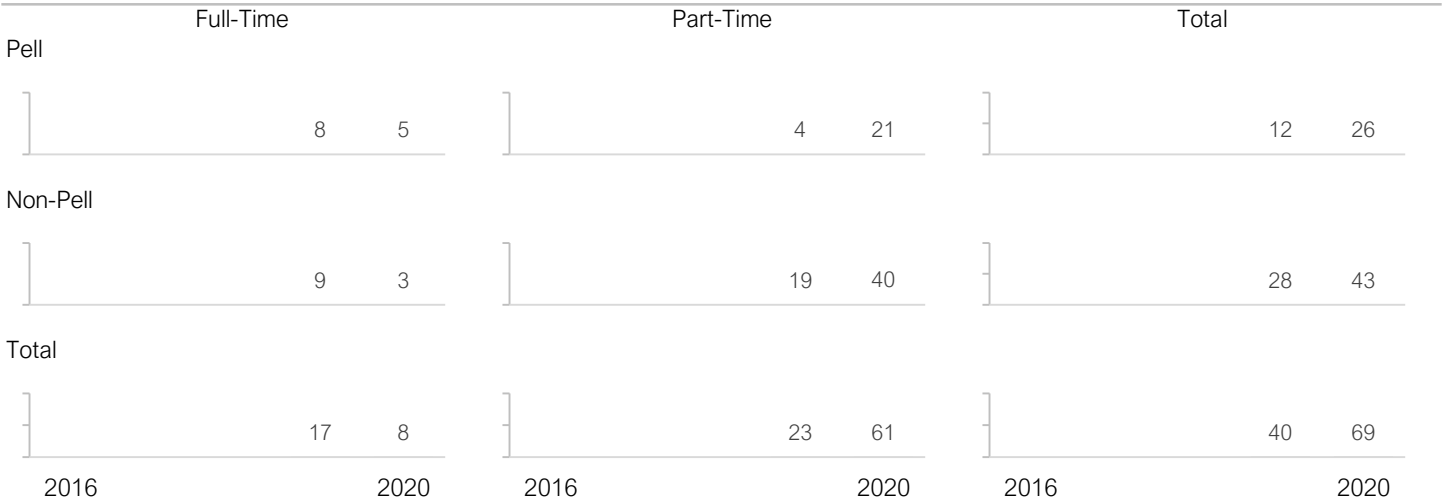
Note: Retention rates redacted where there are five or fewer students.

Exhibit UA.FTSR.12: First-Time Student Headcount Enrollment by Credit Hours and Pell Status

On Campus



Online

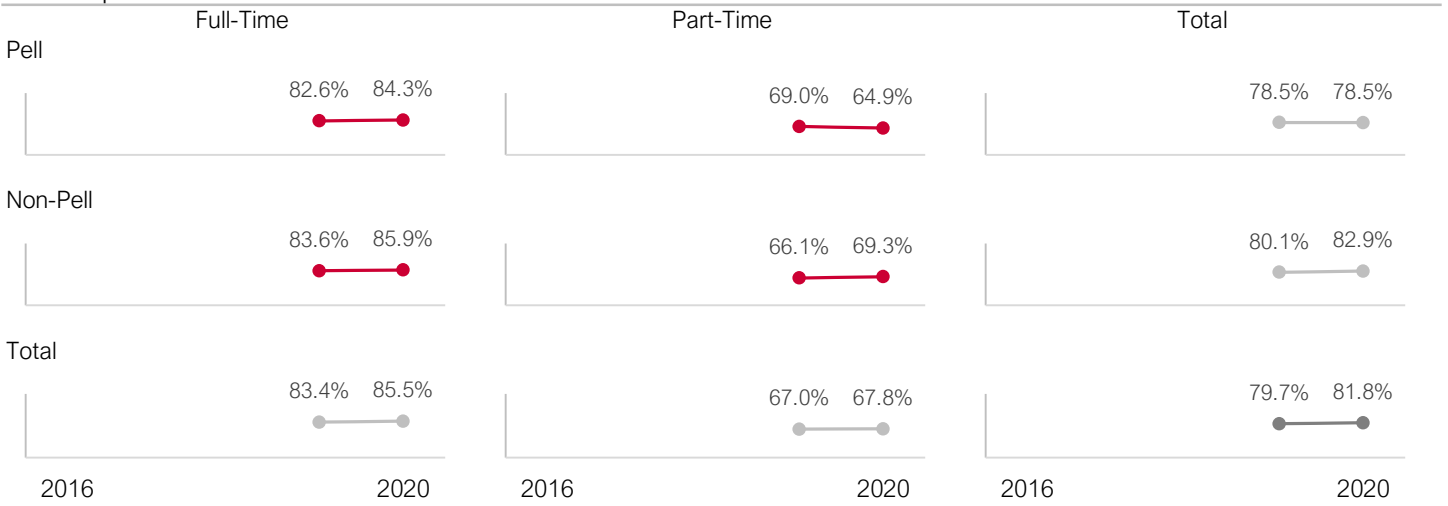


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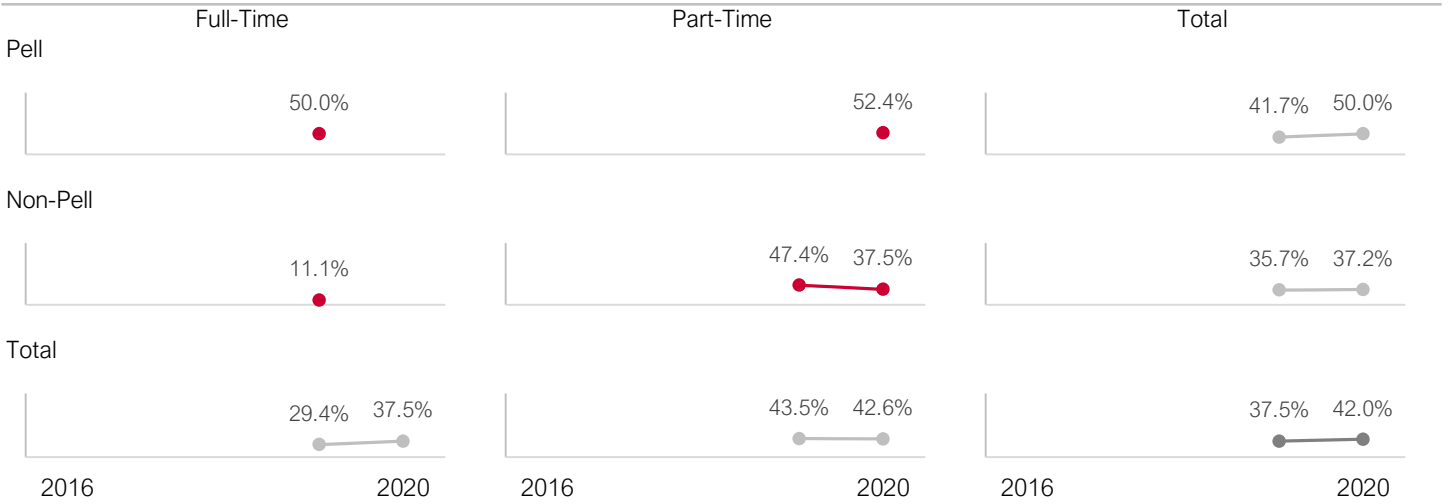


Exhibit UA.FTSR.13: First-Time Student Retention Rate by Credit Hours and Pell Status

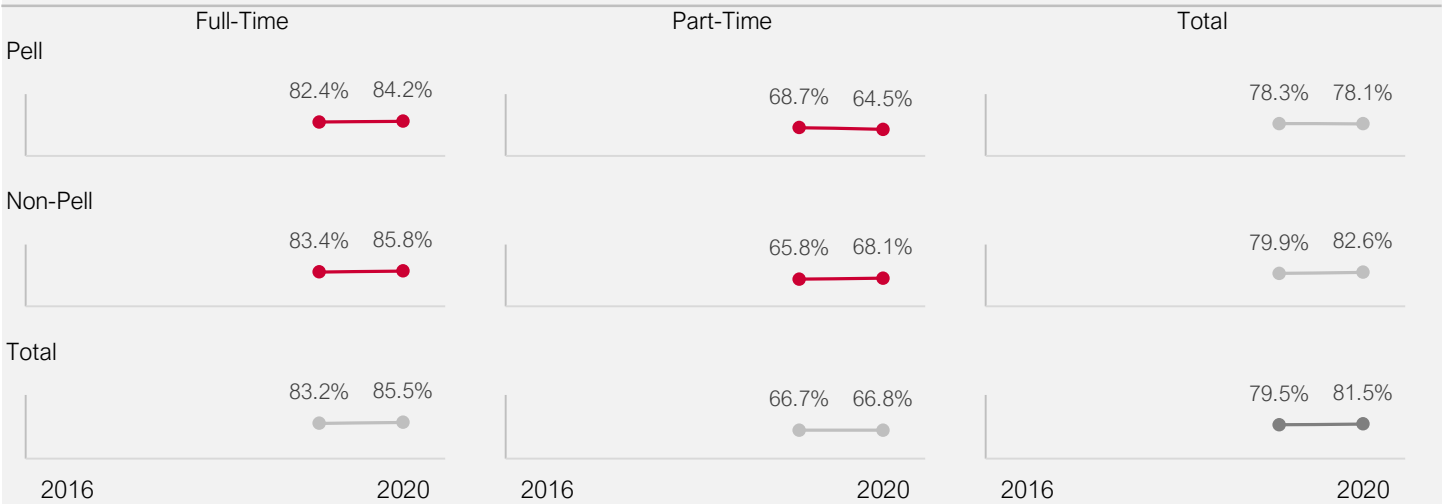
On Campus



Online



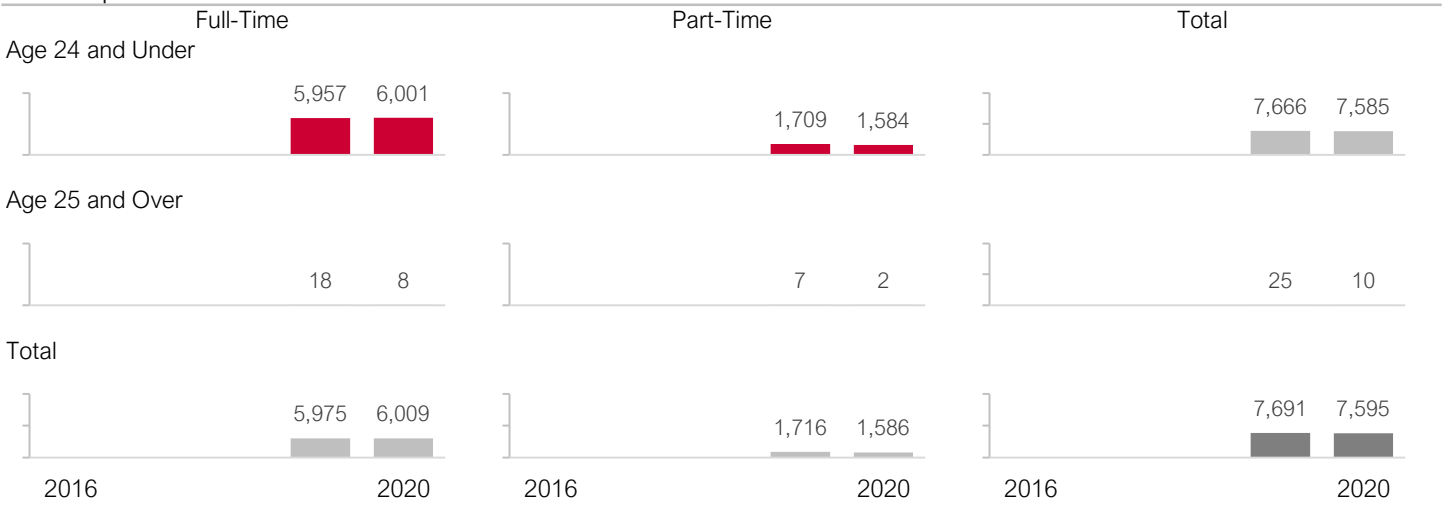
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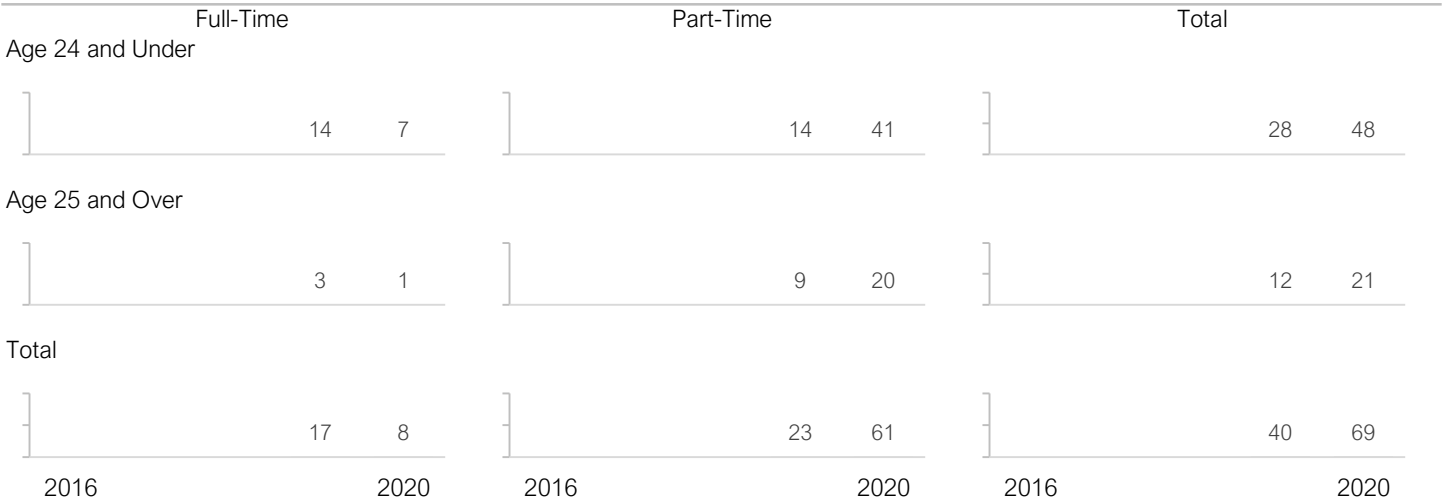
Note: Retention rates redacted where there are five or fewer students.

Exhibit UA.FTSR.14: First-Time Student Headcount Enrollment by Credit Hours and Age

On Campus



Online



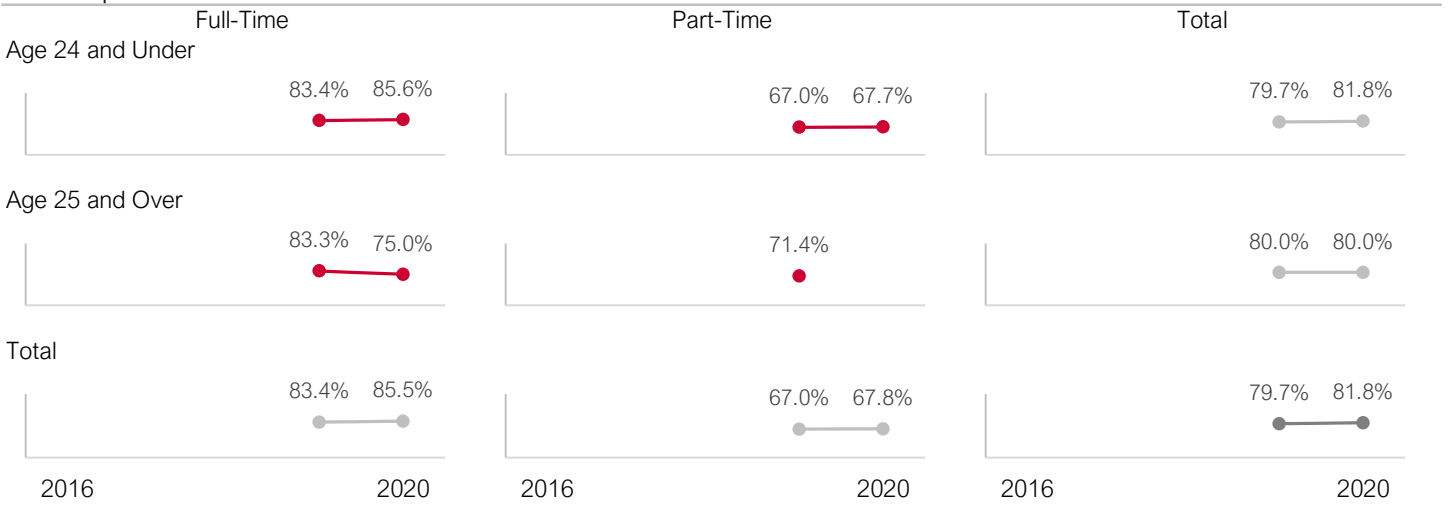
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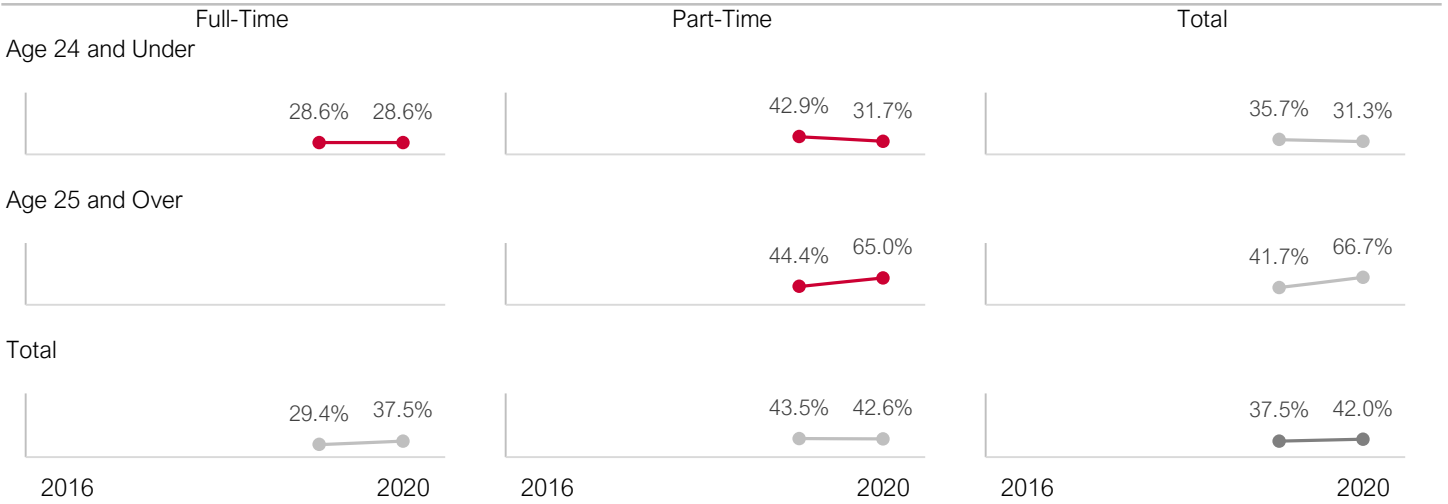
University of Arizona

Exhibit UA.FTSR.15: First-Time Student Retention Rate by Credit Hours and Age

On Campus



Online



Total



Note: Retention rates redacted where there are five or fewer students.

University of Arizona

Exhibit UA.FTSR.16: First-Time Student Headcount Enrollment by Gender and Race Ethnicity



Note: Excludes students with an unspecified gender.

University of Arizona

Exhibit UA.FTSR.17: First-Time Student Retention Rate by Gender and Race Ethnicity



Note: Excludes students with an unspecified gender. Retention rates redacted where there are five or fewer students.



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EXECUTIVE SUMMARY

Item Name: University of Arizona Operational and Financial Review
(UArizona)

Action Item

Requested Action: The University of Arizona asks the board to engage in a presentation and discussion regarding its Fiscal Year 2020-2021 operational and financial review.

Background and Previous History of Board Action

As part of its constitutional responsibility to ensure that Arizona's public universities accomplish their public purpose and mission, the Arizona Board of Regents conducts an annual comprehensive review of the operations and finances of each university. This review emphasizes UArizona's:

- differentiated mission, purpose and identity;
- strategic initiatives;
- current performance levels of the organization;
- emerging threats and opportunities;
- current and future university priorities;
- strengths and weaknesses relative to higher education peers and competitors;
- financial model and resource allocation necessary to support the mission and initiatives;
- key partnerships, relationships and alliances; and,
- anticipated responses to contingencies or environmental changes.

UArizona's OFR discussion allows the regents to understand the details and progress of each university's academic, business, and strategic initiatives against the goals assigned the university, as well as the personnel and financial resources that will be committed.

The process is also intended to enhance transparency in university planning and performance.

Discussion

As part of the OFR discussion, each university president (and, at the president's discretion, key members of the university leadership team) will have the opportunity to make a presentation and engage in a strategic discussion with the board.

Contact Information:

Chad Sampson, ABOR

chad.sampson@azregents.edu

602-229-2512

EXECUTIVE SUMMARY

The presentation and discussion are expected to contain:

- the university's most important modifications to operations and financial strategies;
- informs the board what the university intends to achieve, recognizing the current competitive conditions and environment;
- details the major initiatives that will be deployed;
- identifies the resource commitment it will take to achieve those initiatives;
- identifies the key opportunities available to the university; and addresses what risk factors exist that could prevent the university from achieving its initiatives/goals and the actions needed to mitigate those risks.

Generally, the strategic discussion accompanying the presentation focuses on those areas of greatest importance and urgency to UArizona and cover the strategies and initiatives that will be pursued in the coming year.

Statutory/Policy Requirements

A.R.S. §15-1626(A) General Administrative Powers and Duties of Board

EXECUTIVE SUMMARY

Item Name: Basic Needs Update

Action Item

Requested Action: The board will receive a Basic Needs Update.

Discussion

There are no written materials provided at this time for this item.

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Adoption of Minutes

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DRAFT

ARIZONA BOARD OF REGENTS

Minutes of a Special Board Meeting

Thursday, January 28, 2021

A special board meeting of the Arizona Board of Regents was held virtually on Thursday, January 28, 2021 at 1:00 p.m.

Members Present via video: Regent Penley, Regent Manson, Regent Shoopman, Regent Ridenour, Regent Taylor Robson, Regent DuVal, Regent King, Regent Mata, Regent Rusk and Regent Dave

Members Absent: Superintendent Hoffman and Governor Ducey

Others present via video: from the board office Executive Director John Arnold, General Counsel Jennifer Pollock, Nancy Tribbensee, Samantha Blevins, Chad Sampson, Brittany Kauffman, Larry Sandiago, Suzanne Templin, Tom Merriam and Kim Edwards; from Arizona State University President Crow, Christine Wilkinson, Jose Cardenas, Morgan Olsen, Martin McAllister, Matt Salmon, Adam Deguire, Anotonio Diaz and Kendra Burton; from Northern Arizona University President Cheng, Christy Farley, Bjorn Flugstad, and Katy Yanez; from the University of Arizona President Robbins, Jon Dudas, Laura Todd Johnson, Lisa Rulney, Betsy Cantwell, and Sabrina Vazquez. Elizabeth Fleig and Dave Wollenhaup closed captioners.

Regent Penley called the meeting to order at 1:16 p.m.

Regent Penley congratulated Regent Dave who lead the ASU student team that won the million-dollar XPRIZE Next-Gen Mask Challenge.

PUBLIC SESSION

Discussion and Consideration of Legislation Affecting the University Enterprise (Item 1)

Brittney Kaufmann presented legislation affecting the University Enterprise. The bills presented for board's position of support are as follows:

H2017 Appropriation; stem; learning; workforce development – The legislature intends to appropriate \$3 million, on an on-going basis, from the general fund to the Arizona Commerce Authority to administer grant programs in STEM workforce development. Universities may apply for these grants.

H2142 and S1150 Agricultural workforce program; apprentices; appropriation – A program overseen by the Department of Agriculture with a \$500,000 appropriation for two years from the general fund. This is a workforce program that provides incentives

for food producing agricultural organizations to hire apprentices and provides partial reimbursement for those costs. This bill will benefit University of Arizona's work with cooperative extensions throughout Arizona.

H2390 and H2594 Law Clinic; stream adjudications; appropriations— The bill addresses the large amount of stream adjudications/water rights claims in rural Arizona. The bill proposes allocating \$500,000 to fund the University of Arizona's Natural Resources Users Law and Policy Center to provide pro bono services to small claimants who can't afford legal services, in an effort to settle their claims so the larger claimants cases may be dealt with. Regent Penley commented on the enormous amount of claims that have not been adjudicated. With drought conditions worsening, the issue is significant. This bill will help to reduce pending claims.

H2454 Telehealth; health care providers; requirements— The bill proposes maintaining many of the state's telehealth services initiated during the COVID-19 pandemic. The University of Arizona has been operating the state's telemedicine program since its inception in 1995, providing medical services for the prison system and underserved communities. Collaboration between the telemedicine program director and the governor's office is ongoing.

S1078 Medical student loan program - \$2 million proposed appropriation from the general fund to the Medical Student Loan Fund. The bill proposes changes in the board to remove all but the director of the department of health services. The board would include two gubernatorial appointees and one representative from each of the accredited medical schools in Arizona for eight-year terms. The bill would also modify the requirement of the percentage of loan monies awarded to students attending private medical schools and modifies penalties for loan recipients who do not fulfill their contracts.

S1295 Advance placement courses; exams; appropriations – This bill proposes a \$2.7 million appropriation to enhance access and participation in advanced placement courses and exams. It also establishes a fee waiver program to eliminate or reduce exam fees for students in public schools in Arizona who meet federal poverty guidelines.

S1377 Civil liability; public health pandemic – This bill is before the board because it includes educational institutions. Under consideration is a civil liability bill proposing that during a public health pandemic in which the governor declares a state of emergency, a person or provider that acts in good faith to protect a person or the public from injury is not liable for damages in any civil action for injury, death or loss. Persons or providers who are proven to have failed to act or acted with willful misconduct or gross negligence are not protected under this bill.

Upon motion by Regent Penley; seconded by Regent Shoopman, the board voted to support the following bills, H2017, H2142, S1150, H2390, H2454, S1078, S1295,

S1377. Regents Penley, Manson, Taylor Robson, Shoopman, Ridenour, DuVal, King, Mata and Rusk voted in favor. None opposed and none abstained.

Ms. Kaufmann introduced two additional bills for board discussion. The first bill involves the state historic preservation officer who deals with utilities and giving rights for archeological clearances and developing sites, and the Arizona State Museum which is managed by UArizona. UArizona does the work, preserves the materials and curates the museum but is limited on imposing fees to cover those expenses. There is an issue as to who controls what and how. Executive Director Arnold clarified that there is no position needed at this time, but the board is being made aware so ABOR's and UArizona's government affairs representatives may engage with the sponsor and other constituency groups to improve the current situation. As the bill is, it would be proposed the board take a position of opposition.

The second bill discussed was regarding the New Economy Initiative (NEI) and funds to support university research and development. UArizona's hypersonic testing and the wind tunnel are of great interest to legislators and private industry. Senator Boyer introduced a bill appropriating \$4.5 million to UArizona for research and development of their hypersonic technology. Additional, on-going funds for operational expenses and grants related to this technology are also included in the bill. Ms. Kaufmann and the university government affairs representatives wish to remain active on this issue to ensure the New Economy Initiative moves forward.

Regent Penley urged the government affairs representatives to work closely with the university presidents. The New Economy Initiative needs to move forward to ensure all three universities are educating individuals educated for jobs of the future. While Senator Boyer's bill is helpful, the board needs to keep the interest in all three universities in one initiative. Executive Director Arnold explained possible scenarios regarding the New Economy Initiative bills and urged the board take a position of support for these measures and the University Enterprise partners who are advocating on the board's behalf. It is hoped all these bills will be stopped and a budget conversation will occur, and the Universities Enterprise interests will be brought together.

President Crow noted that the only thing being advance in any way is the governor's budget request and recommended the board support the totality of the budget request and all its elements rather than allowing it to be chopped into separate bills and having them used as political bargaining chips.

Sabrina Vasquez, UArizona government affairs representative commented that Raytheon has stated they will support the entire NEI budget.

Action on these bills was postponed.

Upon motion by Regent King; seconded by Regent Manson, the board approved convening in executive session. Regents Penley, Manson, Shoopman, Taylor Robson, Ridenour, DuVal, King, Mata and Rusk voted in favor. None opposed and none abstained.

EXECUTIVE SESSION

The board convened in executive session at 1:39 p.m.

RECONVENE PUBLIC SESSION

The board reconvened in public session at 5:03 p.m.

Possible Discussion and Consideration of Legislation Affecting the University Enterprise (Item 1)

John Arnold presented two pieces of legislation for the board to consider. S1296 Collegiate athletics; compensation - requires institutions competing in sports to allow a student athlete to receive compensation for the use of that student athlete's name, image or likeness. This bill aligns Arizona state law with NCAA guidelines. The second legislation involves an effort to repeal and amend portions of Proposition 300 which would eliminate the prohibition of Arizona high school graduates who have completed two years at an Arizona high school, and whose legal status is in question, to be eligible to receive resident tuition and financial aid. There currently is not a bill and the motion is conceptual. Position of support by the board is requested.

Regent Penley commented on the board's philosophy for overall attainment for citizens of Arizona for post-secondary education. Long-term benefits for individuals and the state are enhanced by a post-secondary education. The economy of the state depends on raising the attainment rate in Arizona. Focusing on Arizona's high school students, with two years completed in an Arizona high school and their ability to access in-state tuition is the issue being endorsed by the board.

Motion 1:

Upon motion by Regent Penley; seconded by Regent DuVal, the board approved continuing to work toward the success of each of our students and support our elected officials in creating a permanent legislative solution that will provide certainty to our DACA students as well as other students who have completed an Arizona high school degree, providing them greater access to higher education through in-state tuition rate eligibility. Regents Penley, Manson, Taylor Robson, Shoopman, Ridenour, DuVal, King, Mata and Rusk voted in favor. None opposed and none abstained.

Motion 2:

Upon motion by Regent Penley, seconded by Regent King, the board approved the motion to support SB1296 as long as the legislation directly aligns to any future actions of the NCAA. Regents Penley, Manson, Taylor Robson, Shoopman, Ridenour, DuVal, King, Mata and Rusk voted in favor. None opposed and none abstained.

Authorization for the Board's Legal Counsel to Stipulate to Dismissal on the Board's Behalf in *State of Arizona, ex rel. Mark Brnovich, Attorney General, v. Arizona Board of Regents* (Case Nos. CV 2017-012115; 1 CA-CV 18-0420; T-19-0002-CV; CV-19-0027-SA, CV-19-0247). (Item 2)

Regent King recused herself from this item exited the meeting.

General Counsel Jennie Pollock reviewed details of the State of Arizona, ex rel. Mark Brnovich v. Arizona Board of Regents lawsuit regarding tuition and previous court rulings. In November 2020, the Superior Court upheld the trial court's dismissal of counts 1-5 but remanded and reversed the trial court's decision on count 6. This stipulation being brought before the board will dismiss with prejudice the remaining count 6 resulting in an order from the Superior Court to end the litigation and dispose all claims filed against the board in the lawsuit regarding tuition. The stipulation also provides all parties will cover their own attorneys' fees and costs.

Upon motion by Regent Penley; seconded by Regent Manson, the board approved authorization to the board's legal counsel to stipulate to dismissal on the board's behalf in *State of Arizona, ex rel. Mark Brnovich, Attorney General, v. Arizona Board of Regents* (Case Nos. CV 2017-012115; 1 CA-CV 18-0420; T-19-0002-CV; CV-19-0027-SA, CV-19-0247). Regents Penley, Manson, Taylor Robson, Shoopman, Ridenour, DuVal, Mata and Rusk voted in favor. None opposed and none abstained.

ADJOURNMENT

The meeting adjourned 5:12 p.m.

Submitted by:

Kim Edwards
Administrative Associate

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PLACEHOLDER

The February 10-12, 2021 Minutes will be provided separately.

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DRAFT
ARIZONA BOARD OF REGENTS
Minutes of a Special Board Meeting
Wednesday March 10, 2021

A special board meeting of the Arizona Board of Regents was held virtually on Wednesday March 10, 2021 at 3:30 p.m.

Members Present via video: Regent Penley, Regent Manson, Regent Shoopman, Regent Ridenour (joined at 3:35), Regent Taylor Robson, Regent DuVal, Regent King, Regent Mata, Regent Rusk and Regent Dave

Members Absent: Superintendent Hoffman and Governor Ducey

Others present via video: from the board office Executive Director John Arnold, General Counsel Jennifer Pollock, Nancy Tribbensee, Samantha Blevins, Chad Sampson, Brittany Kauffman, Suzanne Templin, Tom Merriam and Kim Edwards; from Arizona State University President Crow, Christine Wilkinson, Jose Cardenas, from Northern Arizona University Christy Farley and Michelle Parker; from the University of Arizona President Robbins and Jon Dudas; President Designee Dr. José Luis Cruz; Jessica Peirson closed captioner.

Regent Penley called the meeting to order at 3:32 p.m.

Upon motion by Regent Manson; seconded by Regent Taylor Robson, the board approved convening in executive session. Regents Penley, Manson, Taylor Robson, Shoopman, DuVal, King, Mata and Rusk voted in favor. None opposed and none abstained. Regent Ridenour was not present for the vote.

EXECUTIVE SESSION

The board convened in executive session at 3:35 p.m.

Executive session recessed at 4:19 p.m.

PUBLIC SESSION

The board reconvened in the public meeting at 4:23 p.m.

Appointment of José Luis Cruz as President of Northern Arizona University (Item 1)

Upon motion by Regent Penley; seconded by Regent Manson, the board voted to appoint Dr. José Luis Cruz as the President of Northern Arizona University effective June 14, 2021, approve key terms for his multiple-year employment contract, and

authorize the board chair to execute the multiple-year employment contract with Dr. Cruz, as discussed and described in the executive summary. Regents Penley, Manson, Taylor Robson, Shoopman, Ridenour, DuVal, King, Mata, and Rusk voted in favor. None opposed and none abstained.

Regent Penley congratulated Dr. Cruz and welcomed him to Arizona and to Northern Arizona University. Dr. Cruz expressed admiration for students, faculty, staff, alumni, tribal and community leaders, elected officials and university presidents who participated in the presidential search process. Dr. Cruz thanked his family for their support. He commented on his eagerness to begin serving as the NAU president, presenting transition plans which include campus visits, in-person meetings and virtual town halls in the months prior to his start date and will be working with President Cheng throughout the transition period. His transition plans include meeting with executive teams, deans, department chairs and the Faculty Senate leaders across the university to understand the current state of affairs as well as learning the aspirations of university professors and how to organize the work to achieve those aspirations. Dr. Cruz acknowledged his love and admiration for his wife Dr. Rima Brusi. He also thanked the co-chairs of the search committee, Regents Manson and DuVal and the board for the opportunity to serve as the 17th president of Northern Arizona University.

Regent DuVal shared that he and Regent Manson took a lot of time listening to the community's vision for the institution and the leadership attributes they sought for its next leader. Dr. Cruz meets those desired needs and aspirations. This appointment confirms that NAU is a nationally recognized university and the search committee sought a leader that reflected that caliber and succeeded with Dr. Cruz.

Regent Manson noted the Flagstaff community is thrilled and excited for Dr. Cruz's arrival. The NAU community is eager to see the growth of the university and that it meets the needs of the student's it attracts.

President Crow and President Robbins congratulated and welcomed Dr. Cruz to the enterprise system and they look forward to working with him and his vast experience within the Enterprise Executive Committee, which includes the three presidents and Executive Director Arnold. Each offered their assistance and noted their anticipation in working with him.

Discussion and Consideration of Legislation Affecting the University Enterprise (Item 2)

Brittney Kaufmann presented legislation affecting the University Enterprise. Ms. Kaufmann provided details of the bills and the affects they would have on the universities and its community. She recommended the board oppose HB2069 Genetic Testing; Private Property which would disrupt the work being done at the universities and private biomedical entities to conform with federal regulations. It is likely, this bill would render Arizona's universities ineligible for federally funded biomedical research

by not allowing access to biobanks that are designed to safely maintain de-identified specimens for research. Ms. Kaufmann also recommended the board oppose HG2804 Public Meetings; Executive Sessions which proposes severely limiting the use of executive session. Restrictions include the board's privilege to receive appropriate legal advice during executive session and would require personnel reviews be discussed in public session.

Upon motion by Regent Penley; seconded by Regent Shoopman the board voted to oppose the following bills, HB2069 and HB2804 in their current forms and work with the bill sponsors to amend the language as needed. Regents Penley, Manson, Taylor Robson, Shoopman, Ridenour, DuVal, King, Mata, and Rusk voted in favor. None opposed and none abstained.

Brittney Kaufmann presented HB2596 ADOT; Telecommunication Facilities installation, recommending the board's support. This proposed bill would authorize the installation of telecommunication facilities between Flagstaff-Phoenix-Tucson-Nogales, providing broadband capabilities and services to entities such as K-12 schools and districts. The Sun Corridor Network (SCN), which the three universities established to provide service to all Arizona communities, in collaboration with ADOT, would provide longitudinal access for the operation and maintenance of the telecommunication facility. The Governor has allocated \$40M of eligible CARES funding for ADOT to install telecom facilities along I-17 and I-19. HB 2596 allows that work to move forward.

Upon motion by Regent Penley; seconded by Regent Mata the board voted to support HB2596; Telecommunication Facilities Installation. Regents Penley, Manson, Taylor Robson, Shoopman, Ridenour, DuVal, King, Mata, and Rusk voted in favor. None opposed and none abstained.

Brittney Kaufmann presented HB2841 Attorney General; Initiation of Action. The proposed bill would authorize the attorney general to initiate legal action to enforce compliance with Article XI, Section 6 of the Arizona Constitution, which provides that university instruction shall be furnished nearly free as possible. Ms. Kauffman recommended to board oppose HB2841.

Regent King recused herself from this item and was not present for this item.

Upon motion by Regent Penley; seconded by Regent Shoopman the board voted to oppose HB2841 Attorney General; Initiation of Action. Regents Penley, Manson, Taylor Robson, Shoopman, Ridenour, DuVal, Mata, and Rusk voted in favor. None opposed and none abstained. Regent King recuses herself for this action.

ADJOURNMENT

The meeting adjourned at 4:44 p.m.

Submitted by:

Kim Edwards
Administrative Associate

EXECUTIVE SUMMARY

Item Name: Report on Finance, Capital and Resources Committee Meeting

Action Item

Requested Action: The board office asks the full board to review the report of the April 1, 2021 Finance, Capital and Resources Committee.

**Agenda Highlights
Finance, Capital and Resources Committee
April 1, 2021**

Executive Session

Pursuant to A.R.S. § 38-431.03(A)(3), (4) and (7), the committee convened in executive session for legal advice, discussion and direction to designated representatives regarding the following items:

- ASU Novus Innovation Corridor Phase III Takedown Notice; and
- ASU Acquisition of Property at 855 and 903 South Rural Road, Tempe, AZ.

Outcomes and Assignments:

- The Novus item was discussed in executive session only. The acquisition of property item was discussed in executive session and regular session.

Pursuant to A.R.S. § 38-431.03(A)(1), (3) and (4), the committee convened in executive session for legal advice, discussion and direction to designated representatives regarding the following item:

- UArizona Multiple-year Employment Agreement for Women's Basketball Head Coach.

Outcomes and Assignments:

- This item was discussed in executive session and regular session.

1. Approval of Minutes

Outcomes and Assignments:

- Minutes from the January 28, 2021 Finance, Capital and Resources Committee meeting were approved.

Contact Information:

Lorenzo Martinez, ABOR

lorenzo.martinez@azregents.edu

602-229-2525

EXECUTIVE SUMMARY

2. Review of Multiple-year Employment Agreement for Women's Basketball Head Coach (UArizona)

Outcomes and Assignments:

- The committee forwarded to the full board for approval the Second Amended multiple-year employment agreement for University of Arizona Women's Basketball Head Coach Adia Barnes, as described in the executive summary.

3. Review of 450 South Tucson Blvd. Property Purchase (UArizona)

Outcomes and Assignments:

- The committee forwarded to the full board for approval the University of Arizona request to purchase a 3.85-acre site improved with a 23,011 square foot building, located at 450 South Tucson Blvd. in Tucson, AZ, adjacent to UArizona's Rincon Vista Sports Complex and Mulcahy Soccer Stadium, as described in the executive summary. The item will be on the board consent agenda.

4. Review of Acquisition of Property at 855 and 903 South Rural Road, Tempe, AZ (ASU)

Outcomes and Assignments:

- The committee forwarded to the full board for approval the Arizona State University request to acquire real property located at 855 and 903 South Rural Road, Tempe, AZ from ACC SC Development, LLC, as described in the executive summary. The item will be on the board consent agenda.
- The committee discussed review of campus master plans at a future meeting.

5. Review of Request to Extend Lease Agreement for Office and Classroom Space located at the Arizona Center (ASU)

Outcomes and Assignments:

- The committee forwarded to the full board for approval Arizona State University's request to enter into a 60-month lease extension, plus a two-year renewal option, with AGP Arizona Center Owner, LLC for 43,802 square feet of office and classroom spaces located at One Arizona Center, 455 N. 3rd Street, Phoenix, AZ, as described in the executive summary. The item will be on the board consent agenda.

EXECUTIVE SUMMARY

6. Review and Discussion of Each University's Share of the Assets and Liabilities under the Public Safety Personnel Retirement System

Outcomes and Assignments:

- The committee forwarded to the full board for consideration and acceptance each university's share of the assets and liabilities under the Public Safety Personnel Retirement System (PSPRS) based on PSPRS' June 30, 2020 actuarial valuation reports for each university, as described in the executive summary. The item will be on the board consent agenda.

7. University Trust Lands Assessment Report and Recommendations

Outcomes and Assignments:

- The committee discussed RCLCO's report and recommendations on the potential development of university trust land parcels.
- Staff was directed to work with RCLCO and the universities on developing revenue estimates for the options of both selling and leasing the identified parcels.

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EXECUTIVE SUMMARY

Item Name: **Review of 450 South Tucson Blvd. Property Purchase (UArizona)**

Action Item

Requested Action: The University of Arizona (UArizona) asks the board to approve the purchase of a 3.85-acre site improved with a 23,011 square foot building, located at 450 South Tucson Blvd. in Tucson, AZ, adjacent to UArizona's Rincon Vista Sports Complex and Mulcahy Soccer Stadium, as described in this executive summary.

Background/History of Previous Board Action

- UArizona owns a 19.5-acre sports complex (the "Rincon Vista Sports Complex") near Tucson Boulevard and 15th Street in Tucson, approximately 2 miles from the UArizona main campus. This complex includes the Mulcahy Soccer Stadium and Murphey Field, home to the women's soccer team, the Roy P. Drachman Track & Field Stadium, a ropes course, and fields used by Campus Recreation for club sports and intramurals. A map of the Complex is attached as Exhibit A.
- The non-profit Tucson Sabbar Shrine Temple owns a 3.85-acre site with a 23,011 square foot meeting lodge and out-buildings (the "Property") at 15th street and Tucson Boulevard, immediately across the street from the Rincon Vista Sports Complex. A map of the Property is attached as Exhibit B. A legal description is attached as Exhibit C. The Shriners seek to sell their facility and relocate to a smaller facility to better accommodate their membership.
- Acquiring the Property will provide UArizona's Intercollegiate Athletics ("ICA") with an opportunity to better accommodate the programs that use the Rincon Vista Complex, as discussed in more detail below, and will provide much-needed safe and well-lit parking to alleviate pressure on the surrounding neighborhood.

Discussion

- The Property is located outside UArizona's planning boundary but is in a strategic location adjacent to existing UArizona ICA and Campus Rec facilities, with access from a major street (Tucson Boulevard).
- The building will provide space for team meetings and team video viewing, as well as providing immediately available shelter for athletes during inclement weather.

Contact Information:

Lisa Rulney, UArizona

Ingentry@arizona.edu

520-621-5977

EXECUTIVE SUMMARY

- This site will also offer safe, well-lit parking for athletes, ICA staff and event patrons, where currently 100-200 cars are parking nightly on poorly-lit, neighborhood streets, negatively impacting residents.
- The sale will close no sooner than July 1, 2021 (in FY2022) and will be funded by ICA with donor funds.
- UArizona secured two appraisals for the Property which have been provided to board counsel, in accordance with ABOR Policy 7-206. The purchase price is \$1,325,000, which represents the average of these two appraisals
- Additional terms of the proposed sale are as follows:
 - \$5,000 will be paid as an earnest money deposit, with the balance due in cash at closing;
 - UArizona has already commenced due diligence, including a comprehensive facility condition assessment completed prior to executing a Letter of Intent, and UArizona will have an additional 30 days for title review and due diligence after execution of the Purchase and Sale Agreement and seller delivery of all relevant documents to UArizona; and
 - Close of escrow 90 days after board approval, but in no event before July 1, 2021.
- Upon approval of this item, the UArizona Senior Vice President for Business Affairs and Chief Financial Officer, and/or her designee, are authorized in the name and on behalf of the board to take all appropriate actions to finalize negotiations and to sign and deliver all documents and agreements necessary to consummate the transaction on substantially the terms described in this executive summary.

Committee Review and Recommendation

The Finance, Capital and Resources Committee reviewed this item at its April 1, 2021 meeting and recommended forwarding to the full board for approval.

Statutory/Policy Requirements

- ABOR Policy 7-203 requires review by the Finance, Capital and Resources Committee and approval of the board for the purchase of any property for more than \$500,000 or located outside a university's planning boundary.

EXECUTIVE SUMMARY

- ABOR Policy 7-206 requires that the university secure two appraisals for property estimated to have a purchase price greater than \$1,000,000. Appraisals are to be provided to board counsel and are to be kept confidential until after close of escrow.

EXECUTIVE SUMMARY

EXHIBIT "A"

Site Depiction



EXECUTIVE SUMMARY

EXHIBIT "B"

Aerial of Site



EXECUTIVE SUMMARY

EXHIBIT "C"

LEGAL DESCRIPTION

THE LAND REFERRED TO HEREIN BELOW IS SITUATED IN THE COUNTY OF PIMA, STATE OF ARIZONA, AND IS DESCRIBED AS FOLLOWS:

Blocks 3 and 4 of PARKWAY VISTA ADDITION, a subdivision of Pima County, Arizona, according to the map or plat thereof of record in the office of the County Recorder of Pima County, Arizona in [Book 7 of Maps and Plats at page 94](#) thereof;

TOGETHER WITH all that portion of Arroyo Parkway aka Arroyo Chico vacated by Ordinance No. 5872, recorded February 24, 1984 in [Docket 7226 at page 1221](#) and conveyed in [Docket 7226 at page 1246](#);

EXCEPT THEREFROM all that portion of Block 4 conveyed to City of Tucson in Deed recorded February 24, 1984 in [Docket 7226 at page 1242](#);

FURTHER EXCEPT THEREFROM all of that portion conveyed to the City of Tucson, a municipal corporation recorded April 3, 2012 at [Recording No. 20120940219](#).

[APN: 129-03-024C](#)

EXECUTIVE SUMMARY

Item Name: **Review of Request to Extend Lease Agreement for Office and Classroom Space located at the Arizona Center (ASU)**

Action Item

Requested Action: Arizona State University (ASU) asks the board to approve the request to enter into a 60-month lease extension, plus a two-year renewal option, with AGP Arizona Center Owner, LLC for 43,802 square feet of office and classroom spaces located at One Arizona Center, 455 N. 3rd Street, Phoenix, AZ (the "property"), as described in this executive summary.

Background/History of Previous Board Action

- ASU has been a tenant at Arizona Center since 2013.
- The initial lease terms did not require board approval. ASU received board authorization at its June 2016 meeting to extend the term of the lease through June 30, 2021.
- The lease expires June 30, 2021, and ASU desires to extend the lease term for the property for an additional 60 months, through June 30, 2026, with an option to renew for an additional two years.
- The property is strategically located in the core of the ASU Downtown campus.

Discussion

- Academic uses located within the property include classroom space, language programs, the College of Integrative Arts and Science Dean's Office, and the Center for Mindfulness.
- The extension lease rate is \$25.25 per square foot annually with 3% annual increases. The lease rate and annual escalations are in line with fair market rental rates.
- The lease extension will include two months of abated rent, plus a tenant improvement allowance of \$4.50 per square foot. As an inducement to extend the lease, the landlord will provide an approximate additional \$4.34 per square foot to replace six HVAC units, lighting and drinking fountains benefitting ASU.

Contact Information:

Morgan R. Olsen, ASU

morgan.r.olsen@asu.edu

480-727-9920

EXECUTIVE SUMMARY

- The total lease payments for the first year of the extension term will be approximately \$1,106,000, to be funded from general purpose funds.
- The lease includes access to up to 106 parking spaces in the adjacent Arizona Center parking garage at an initial cost of \$75 per space per month. The cost of the spaces is borne by the users of the spaces.
- ASU's pro rata share of common area expenses are passed through using an increase over the base year for expenses. The existing lease base year for expenses is 2017, which will be adjusted to 2021, resulting in an annual savings to ASU of approximately \$4.00 per square foot.
- The lease extension will provide ASU the ability to meet existing space needs while providing flexibility to plan for future growth on the Downtown Phoenix campus.
- Upon approval, the following are each separately authorized in the name and on behalf of the Board to take all appropriate actions to finalize negotiations and to sign and deliver all documents and agreements necessary to consummate the transaction described in this Executive Summary, on substantially the terms described herein: the ASU President; ASU Executive Vice President, Treasurer and Chief Financial Officer; and the ASU Vice President for Real Estate Development, or any successor titles to such positions.

Committee Review and Recommendation

The Finance, Capital and Resources Committee reviewed this item at its April 1, 2021 meeting and recommended forwarding to the full board for approval.

Statutory/Policy Requirements

- ABOR Policy 7-207(A)(2) requires board approval for the lease of real property if the lease term is in excess of 60 months, if the renewal period is in excess of 60 months, or if the total annual base lease amount exceeds \$1,000,000.

EXECUTIVE SUMMARY

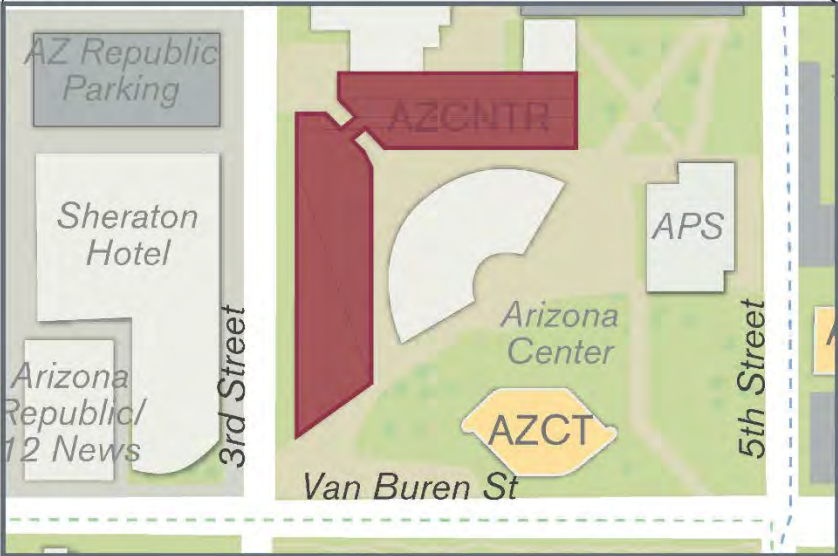
EXHIBIT A – LOCATION MAP



ASU Downtown Phoenix campus



Arizona Center - Detail



Arizona Center - R69

455 N. Third Street, Phoenix, AZ 85004

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EXECUTIVE SUMMARY

Item Name: **Review of Acquisition of Property at 855 and 903 South Rural Road, Tempe, AZ (ASU)**

Action Item

Requested Action: Arizona State University (ASU) asks the board to approve the acquisition of real property located at 855 and 903 South Rural Road, Tempe, AZ from ACC SC Development, LLC, as described in this executive summary.

Background/History of Previous Board Actions

- ASU requests authorization to acquire this vacant land parcel, which is strategically located adjacent to multiple parcels and buildings owned by ASU, to meet the evolving space needs of the University. The property is contiguous to the ASU-owned parcel at 910 South Terrace Road, Tempe, AZ. The property also is located just north of the Greek Leadership Village and south and east of the Interdisciplinary Science and Technology Building (ISTB) 7 currently under construction on the west side of Rural Road.
- ACC SC Development, LLC (ACC) is an affiliate of American Campus Communities. American Campus Communities was selected through a competitive procurement process to develop third-party student housing on the ASU Tempe campus. ABOR approved the most recent ACC student housing project, Greek Leadership Village, at ABOR's November 2016 meeting. ACC in partnership with the University has developed 7,672 student housing beds at ASU since their selection.
- This land acquisition will allow ASU to ensure use of the property for future University space needs, increase the utility and redevelopment potential of the empty building at 910 South Terrace Road, Tempe, AZ and assemble a parcel that provides connectivity among multiple University assets.

Discussion

- The property consists of 90,208 square feet (approximately 2.07 acres) of vacant land. The current owner, 529 Tempe, LLC, an affiliate of Golub & Company, assembled the property through multiple transactions with the intent to develop a mixed-use high-rise project. The owner is divesting the property rather than proceeding with development.
- ACC SC Development, LLC has entered into a purchase and sale agreement with the owner to acquire the property for \$12,200,000.

Contact Information:

Morgan R. Olsen, ASU

Morgan.R.Olsen@asu.edu

480-727-9920

EXECUTIVE SUMMARY

- ASU and ACC will enter into a project assembly agreement that contemplates the parties working collaboratively, for up to 30 months, to determine the feasibility of developing a mixed-use project that includes the property and the university-owned parcel at 910 South Terrace Road. If a viable project scope is identified, ASU would seek ABOR approval, as necessary, prior to entering into any project-specific agreements.
- In the event that it is determined a joint development project is not feasible or desirable, ASU requests approval to acquire the property from ACC. The project assembly agreement will include a put option which ACC can exercise beginning on the one-year anniversary of the project assembly agreement. If ACC exercises such put option, ASU will acquire the property from ACC.
- ASU's acquisition price for the property will be ACC's net purchase price paid to acquire the property, plus closing costs, carry costs and 6.5% interest on applicable costs. Interest and carry costs will be calculated from the date of ACC's acquisition of the property through conveyance of the property to ASU.
- ASU has obtained two appraisals for the property as required by ABOR policy; these appraisals support the current acquisition price.
- The acquisition price for the property would be paid from available local funds.
- ASU requests that, upon approval, the following are each separately authorized in the name and on behalf of the Board to take all appropriate actions to finalize negotiations and to sign and deliver all documents and agreements necessary to consummate the transaction described in this Executive Summary, on substantially the terms described herein: the ASU President; the ASU Executive Vice President, Treasurer and Chief Financial Officer; and the ASU Vice President for Real Estate Development, or any successor titles to such positions.

Committee Review and Recommendation

The Finance, Capital and Resources Committee reviewed this item at its April 1, 2021 meeting and recommended forwarding to the full board for approval.

Statutory/Policy Requirements

- ABOR Policy 7-203 requires board approval for the purchase of real property if the purchase price exceeds \$500,000.

EXECUTIVE SUMMARY

- ABOR Policy 7-203 requires that a request for authorization to purchase real property include a legal description of the real property.
- ABOR Policy 7-206(B) requires two appraisals for the purchase of real property with an anticipated sale price exceeds \$1,000,000.

Exhibits

- Exhibit A – Legal Description
- Exhibit B – Location Map

EXECUTIVE SUMMARY

EXHIBIT "A"

LEGAL DESCRIPTION

A parcel of land lying within the northwest quarter of Section 23, Township 1 North, Range 4 East, of the Gila and Salt River Meridian, Maricopa County, Arizona, more particularly described as follows:

COMMENCING at the northwest corner of said Section 23, a 3-inch brass cap in handhole, from which the west quarter corner of said section, a 3-inch City of Tempe brass cap in handhole, bears South 00°00'00" West (basis of bearing), a distance of 2640.82 feet;

THENCE along the west line of said section, South 00°00'00" West, a distance of 426.28 feet;

THENCE leaving said west line, North 90°00'00" East, a distance of 75.04 feet, to the southerly line of that certain parcel of land described in Document No. 2013-0292453, Maricopa County Records (M.C.R.) and the POINT OF BEGINNING;

THENCE along said southerly line, South 75°13'56" East, a distance of 315.92 feet, to a point hereby designated as Point "A" for future reference in this description;

THENCE continuing along said southerly line and the southerly prolongation thereof, South 14°31'00" West, a distance of 128.94 feet, to the southerly right-of-way line of the McKinney-Kirkland Ditch as shown on Right-of-Way Map recorded in Book 1057, page 32, M.C.R.;

THENCE along said southerly right-of-way line, North 78°33'56" West, a distance of 10.92 feet;

THENCE North 73°54'54" West, a distance of 1.18 feet;

THENCE leaving said southerly right-of-way line, South 20°26'18" West, a distance of 9.86 feet;

THENCE South 14°39'21" West, a distance of 124.21 feet, to the east line of Lot 1 of Terrace Lots as shown on Final Plat recorded in Book 1076, page 9, M.C.R.;

THENCE along said east line, South 00°00'00" East, a distance of 91.77 feet;

THENCE leaving said east line, South 28°28'34" East, a distance of 2.79 feet;

THENCE southerly, along a curve to the right, having a radius of 24.50 feet, a central angle of 43°59'54", a distance of 18.81 feet;

THENCE southwesterly, along a non-tangent curve to the right, whose radius bears North 74°34'34"

West a distance of 25.28 feet, having a central angle of 18°31'52", a distance of 8.18 feet, to said east line;

THENCE along said east line, South 00°00'00" East, a distance of 27.56 feet, to the southeast corner of said Lot 1;

THENCE leaving said east line, along the southerly line of said Lot 1, North 40°51'45" West, a distance of 67.07 feet;

THENCE North 43°03'21" West, a distance of 89.08 feet;

THENCE North 43°23'46" West, a distance of 194.75 feet;

EXECUTIVE SUMMARY

THENCE North 00°00'00" East, a distance of 22.79 feet;

THENCE South 90°00'00" West, a distance of 8.00 feet, to the northerly most southwest corner of said Lot 1 and the east right-of-way line of Rural Road;

THENCE leaving said southerly line, along said east right-of-way line, North 00°00'00" East, a distance of 185.38 feet, to the southerly line of that certain parcel of land described in Document No. 2013-0292453, M.C.R.;

THENCE leaving said east right-of-way line, along said southerly line, South 47°56'59" East, a distance of 1.02 feet;

THENCE North 52°23'04" East, a distance of 24.34 feet to the POINT OF BEGINNING.

TOGETHER WITH

COMMENCING at said Point "A";

THENCE South 82°27'19" East, a distance of 25.19 feet, to the easterly most corner of said certain parcel of land described in Document No. 2013-0292453, M.C.R. and the **POINT OF BEGINNING**.

THENCE South 75°13'56" East, a distance of 13.50 feet;

THENCE South 14°31'00" West, a distance of 104.82 feet, to the northerly right-of-way line of said McKinney-Kirkland Ditch;

THENCE along said northerly right-of-way line, North 78°33'56" West, a distance of 13.52 feet, to the southeast corner of said certain parcel of land;

THENCE leaving said northerly right-of-way line, along the easterly line of said certain parcel of land, North 14°31'00" East, a distance of 105.61 feet to the **POINT OF BEGINNING**.

Containing 90,208 square feet or 2.0709 acres, more or less.

Subject to existing rights-of-way and easements.

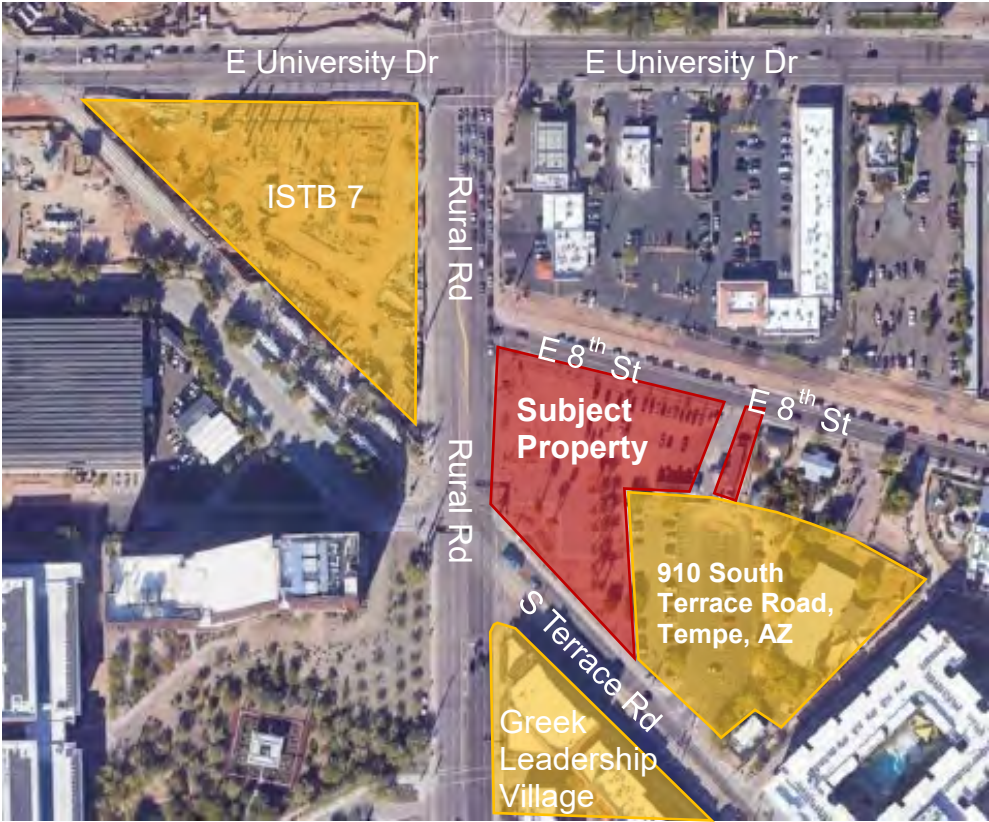
EXCEPT any portion included in Lot 2 of the Terrace Lots Subdivision recorded in Book 1076, page 9, M.C.R.

EXECUTIVE SUMMARY

EXHIBIT "B"

Location Map

Proposed purchase property location and adjacency to other parcels owned by ASU



Property at 855 and 903 South Rural Road, Tempe

EXECUTIVE SUMMARY

Item Name: Review of Each University's Share of the Assets and Liabilities under the Public Safety Personnel Retirement System

Action Item

Requested Action: The board office asks the board for consideration and acceptance each university's share of the assets and liabilities under the Public Safety Personnel Retirement System (PSPRS) based on PSPRS' June 30, 2020 actuarial valuation reports for each university, as described in this executive summary.

Background/History of Previous Board Action

Three years ago, the Legislature promulgated HB 2097 (Laws 2018, Chapter 112, now codified at A.R.S. § 38-863.01), which requires governing bodies of employers participating in the Public Safety Personnel Retirement System (PSPRS) to:

1. Adopt a pension funding policy for the PSPRS for employees hired before July 1, 2017; and
2. Formally accept the employer's share of the assets and liabilities under the PSPRS based on the PSPRS' actuarial valuation report.

The law required implementation of the aforementioned items by July 1, 2019, which the board approved at its June 2019 meeting. The law also requires the board to take action annually regarding these items.

The board promulgated ABOR Policy 6-609 to meet the requirements established by A.R.S. §38-863.01, which the board adopted at its June 2019 meeting.

This policy requires the universities to submit the following information to the board:

- Pursuant to Section (B) (2) of the policy, each university will annually submit to the board for the board's consideration and acceptance the assets, liabilities and current funding ratios of its PSPRS trust fund based on PSPRS' most recent actuarial valuations for police employees hired before July 1, 2017.
- Pursuant to Section (B)(3) of the policy, each university will annually report the following information to the board:

Contact Information:

Leatta McLaughlin, ABOR	leatta.mclaughlin@azregents.edu	602-229-2524
Joanne Wamsley, ASU	joanne.wamsley@asu.edu	480-965-6940
Wendy Swartz, NAU	wendy.swartz@nau.edu	928-523-6081
Stacy Lemos, UArizona	sslemos@email.arizona.edu	520-621-0690
Jodi Ketchmark, UArizona	ketchmark@email.arizona.edu	520-626-7721

EXECUTIVE SUMMARY

- Its estimated combined university police department Annual Required Contribution (“ARC”) for each fiscal year;
- Its actions toward achieving the board’s PSPRS funding ratio goal.

The statute and policy further require the board to annually accept each university’s share of the assets and liabilities under the PSPRS based on the PSPRS’ actuarial valuation report for each university. These PSPRS actuarial reports are attached to this executive summary.

The universities have submitted the following information to comply with ABOR Policy 6-609 and A.R.S. § 38-863.01.

Discussion

ASU:

The following actuarial data cited is from the ASU Campus Police Arizona PSPRS Report from Foster & Foster, June 30, 2020 actuarial valuation – Section III Liability Support. The report is attached.

Trust Fund	Assets	Accrued Liability	Unfunded Actuarial Accrued Liability	Funded Ratio
ASUPD-041	\$23,954,831	\$47,985,951	\$24,031,120	49.9%

ASU’s estimated combined Annual Required Contribution for FY2022 is \$2,438,322.

ASU plans to meet the June 30, 2036 PSPRS funding ratio goal by the systematic reduction of the Unfunded Actuarial Accrued Liability through the annual payment of the Annual Required Contribution from the university’s operating revenues.

NAU:

The following actuarial data cited is from the NAU Campus Police Arizona PSPRS Report from Foster & Foster, June 30, 2020 actuarial valuation – Section III Liability Support. The report is attached.

Trust Fund	Assets	Accrued Liability	Unfunded Actuarial Accrued Liability	Funded Ratio
NAUPD-056	\$5,426,664	\$13,175,996	\$7,749,332	41.2%

NAU’s estimated combined Annual Required Contribution for FY 2022 is \$856,223.

EXECUTIVE SUMMARY

NAU plans to meet the June 30, 2036 PSPRS funding ratio goal by the systematic reduction of the Unfunded Actuarial Accrued Liability through the annual payment of the Annual Required Contribution from the university's operating revenues.

UArizona:

The following actuarial data cited is from the U of A Campus Police Arizona PSPRS Report from Foster & Foster, June 30, 2020 actuarial valuation – Section III Liability Support. The report is attached.

Trust Fund	Assets	Accrued Liability	Unfunded Actuarial Accrued Liability	Funded Ratio
45-UAPD	\$19,920,697	\$36,924,231	\$17,003,534	54.0%

UArizona's estimated combined Annual Required Contribution for FY 2022 is \$1,626,443.

UArizona plans to meet the June 30, 2036 PSPRS funding ratio goal by the systematic reduction of the Unfunded Actuarial Accrued Liability through the annual payment of the Annual Required Contribution from the university's operating revenues.

Committee Review and Recommendation

The Finance, Capital and Resources Committee reviewed this item at its April 1, 2021 meeting and recommended forwarding to the full board for approval.

Statutory/Policy Requirements

A.R.S. §38-863.01
ABOR Policy 6-609

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**ARIZONA PUBLIC SAFETY PERSONNEL
RETIREMENT SYSTEM**

ASU CAMPUS POLICE (041)

ACTUARIAL VALUATION
AS OF JUNE 30, 2020

CONTRIBUTIONS APPLICABLE TO THE
PLAN/FISCAL YEAR ENDING JUNE 30, 2022



FOSTER & FOSTER
ACTUARIES AND CONSULTANTS

December 2020

Board of Trustees
Arizona Public Safety Personnel Retirement System
Phoenix, AZ

Re: Actuarial Valuation Report as of June 30, 2020 for ASU Campus Police (041)

Dear Members of the Board:

We are pleased to present to the Board this report of the annual actuarial valuation of the Arizona Public Safety Personnel Retirement System (PSPRS). The valuation was performed to determine whether the assets and contributions are sufficient to provide the prescribed benefits and to develop the appropriate funding requirements for the applicable plan year.

This report was prepared at the request of the Board and is intended for use by PSPRS and those designated or approved by the Board. It documents the valuation of the consolidated plan and provides summary information for PSPRS participating employers. This report may be provided to parties other than PSPRS only in its entirety and only with the permission of the Board. Foster & Foster is not responsible for the unauthorized use of this report.

The valuation has been conducted in accordance with generally accepted actuarial principles and practices, including the applicable Actuarial Standards of Practice as issued by the Actuarial Standards Board, and reflects laws and regulations issued to date pursuant to the provisions of Title 38, Chapter 5, Article 4 of the Arizona Revised Statutes, as well as applicable federal laws and regulations. In our opinion, the assumptions used in this valuation, as adopted by the Board of Trustees, represent reasonable expectations of anticipated plan experience. Future actuarial measurements may differ significantly from the current measurements presented in this report for a variety of reasons including changes in applicable laws, changes in plan provisions, changes in assumptions, or plan experience differing from expectations. Due to the limited scope of the valuation, we did not perform an analysis of the potential range of such future measurements.

The computed contribution rates shown in the "Contribution Results" section should be considered minimum contribution rates that comply with the Board's funding policy and Arizona Statutes. Users of this report should be aware that contributions made at that rate do not guarantee benefit security. Given the importance of benefit security to any retirement system, we suggest that contributions to the System in excess of those presented in this report be considered.

The funding percentages and unfunded accrued liability as measured based on the actuarial value of assets will differ from similar measures based on the market value of assets. These measures, as provided, are appropriate for determining the adequacy of future contributions, but may not be appropriate for the purpose of settling a portion or all of the Plan's liabilities.

In conducting the valuation, we have relied on personnel, plan design, and asset information supplied by PSPRS through June 30, 2020 and the actuarial assumptions and methods described in the Actuarial Assumptions section of this report. While we cannot verify the accuracy of all this information, the supplied information was reviewed for consistency and reasonableness. As a result of this review, we have no reason to doubt the substantial accuracy of the information and believe that it has produced appropriate results. This information, along with any adjustments or modifications, is summarized in various sections of this report.

This valuation assumes the continuing ability of the participating employers to make the contributions necessary to fund this plan. A determination regarding whether or not the participating employers are actually able to do so is outside our scope of expertise. Consequently, we did not perform such an analysis.

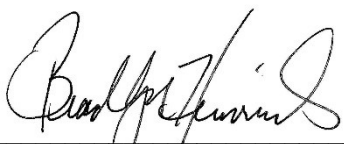
The undersigned are familiar with the immediate and long-term aspects of pension valuations and meet the Qualification Standards of the American Academy of Actuaries necessary to render the actuarial opinions contained herein. All sections of this report are considered an integral part of the actuarial opinions.

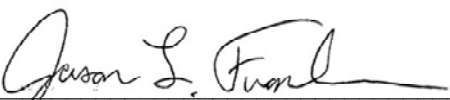
To our knowledge, no associate of Foster & Foster, Inc. working on valuations of the program has any direct financial interest or indirect material interest in the Arizona Public Safety Personnel Retirement System, nor does anyone at Foster & Foster, Inc. act as a member of the Board of Trustees of the Arizona Public Safety Personnel Retirement System. Thus, there is no relationship existing that might affect our capacity to prepare and certify this actuarial report.

If there are any questions, concerns, or comments about any of the items contained in this report, please contact us at 239-433-5500.

Respectfully Submitted,

Foster & Foster, Inc.

By: 
Bradley R. Heinrichs, FSA, EA, MAAA

By: 
Jason L. Franken, FSA, EA, MAAA

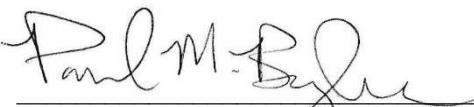
By: 
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I. SUMMARY OF REPORT

The regular annual actuarial valuation of the Arizona Public Safety Personnel Retirement System for the ASU Campus Police, performed as of June 30, 2020, has been completed and the results are presented in this Report. The purpose of this valuation is to:

- Compute the liabilities associated with benefits likely to be paid on behalf of current retired and active members. This information is contained in the section entitled “Liability Support.”
- Compare accumulated assets with the liabilities to assess the funded condition. This information is contained in the section entitled “Liability Support.”
- Compute the employers’ recommended contribution rates for the Fiscal Year beginning July 1, 2021. This information is contained in the section entitled “Contribution Results.”

1. Key Valuation Results

The funded status as of June 30, 2020 and the employer contribution amounts applicable to the plan/fiscal year ending June 30, 2022 are as follows:

	Tier 1 & Tier 2 Members			Tier 3 Members *		
	Pension	Health	Total	Pension	Health	Total
Employer Contribution Rate	46.66%	0.01%	46.67%	9.05%	0.13%	9.18%
Funded Status	49.9%	136.1%	51.4%	101.4%	203.9%	103.0%

2. Comparison of Key Results to Prior Year

The chart below compares the results from this valuation with the results of the prior year’s valuation (as of June 30, 2019):

Contribution Rate

Valuation Date	Tier 1 & Tier 2 Members			Tier 3 Members *		
	Pension	Health	Total	Pension	Health	Total
June 30, 2019	45.48%	0.10%	45.58%	9.21%	0.14%	9.35%
June 30, 2020	46.66%	0.01%	46.67%	9.05%	0.13%	9.18%

Funded Status

Valuation Date	Tier 1 & Tier 2 Members			Tier 3 Members		
	Pension	Health	Total	Pension	Health	Total
June 30, 2019	48.6%	140.5%	50.2%	116.9%	205.3%	118.4%
June 30, 2020	49.9%	136.1%	51.4%	101.4%	203.9%	103.0%

* The Tier 3 rates shown are the calculated rates as of the valuation date and do not reflect any Legacy costs that the employer must also contribute.

3. Reasons for Change

Changes in the results from the prior year’s valuation can be illustrated in the following tables along with high-level explanations for the entire System below:

	Contribution Rate			
	Tier 1 & Tier 2		Tier 3 Members	
	Pension	Health	Pension	Health
Contribution Rate Last Valuation	45.48%	0.10%	9.21%	0.14%
Asset Experience	0.66%	0.03%	0.02%	0.00%
Payroll Base	(1.45%)	0.02%	0.02%	(0.02%)
Liability Experience	(0.21%)	(0.02%)	(0.15%)	0.00%
Assumption/Method Change	0.82%	(0.07%)	0.00%	0.00%
Other	<u>1.36%</u>	<u>(0.05%)</u>	<u>(0.05%)</u>	<u>0.01%</u>
Contribution Rate This Valuation	46.66%	0.01%	9.05%	0.13%

	Funded Status			
	Tier 1 & Tier 2		Tier 3 Members	
	Pension	Health	Pension	Health
Funded Status Last Valuation	48.6%	140.5%	116.9%	205.3%
Asset Experience	(0.9%)	(2.7%)	(0.6%)	(1.2%)
Liability Experience	0.1%	1.8%	4.1%	5.4%
Assumption/Method Change	0.0%	0.0%	0.0%	0.0%
Other	<u>2.1%</u>	<u>(3.5%)</u>	<u>(19.0%)</u>	<u>(5.6%)</u>
Funded Status This Valuation	49.9%	136.1%	101.4%	203.9%

Assets Experience – Asset gains and losses (relative to the assumed earnings rate) are smoothed over seven years for Tiers 1 and 2 and over five years for Tier 3. The return on the market value of assets for the year ending June 30, 2020 was 1.2% for Tiers 1 and 2 and 1.7% for Tier 3. On a smoothed, actuarial value of assets basis, however, the average return was 5.4% for Tiers 1 and 2 and 6.1% for Tier 3. This fell short of the 2019 assumed earnings rate for Tiers 1 and 2 of 7.3% and for Tier 3 of 7.0%.

Liability Experience – Experience overall was unfavorable, driven by less than expected inactive mortality and turnover.

Payroll Base – Under the current amortization policy for Tiers 1 and 2, the contribution rate is developed as a level percentage of payroll. The payroll is expected to increase each year in line with the growth assumption (currently 3.50%). To the extent that actual payroll is lower/greater than expected, the contribution rate will increase/decrease as a result.

Assumption / Method Change – The amortization method for Tiers 1 and 2 was updated to use a layered approach. New bases will be amortized on a Level Dollar basis while the 2019 base will continue to be amortized on a Level Percentage of Payroll basis.

Other – This is the combination of all other factors that could impact liabilities year-over-year, with the primary sources being changes resulting from an updated understanding of some data components provided by staff and changes in member data. Note that Tier 3 experience will stabilize as the group matures.

4. Looking Ahead

The continuing effect of prior asset losses was dampened by the asset smoothing reflected in the actuarial value of assets. There remain unrecognized investment losses that will, in the absence of other gains, put upward pressure on the contribution rate next year.

If the June 30, 2020 pension valuation results were based on the market value of assets instead of the actuarial value of assets, the pension funded percentage for Tiers 1 and 2 would be 46.4% (instead of 49.9%) and the pension employer contribution requirement would be 49.27% of payroll (instead of 46.66%).

5. Conclusion

The funded status for Tiers 1 and 2 will continue to improve if assumptions are met and contributions at least equal to the rates determined for each employer are made to the fund. The recent adoption of a layered amortization approach along with a plan to systematically lower the payroll growth assumption was an excellent step to improve funding and ensure the Plan is on a viable path.

The funded status for Tier 3 will stabilize as the population continues to grow, as contributions appear sufficient to keep the liabilities fully funded.

II. CONTRIBUTION RESULTS

Contribution Requirements

Development of Employer Contributions - Tiers 1 & 2 Members				
Valuation Date	June 30, 2020		June 30, 2019	
Applicable to Fiscal Year Ending	2022		2021	
	Rate	Dollar	Rate	Dollar
Pension				
Normal Cost				
Total Normal Cost	21.51%	\$ 1,124,053	22.41%	\$ 1,125,384
Employee Cost	<u>(7.65%)</u>	<u>(399,768)</u>	<u>(7.65%)</u>	<u>(384,235)</u>
Employer (Net) Normal Cost	13.86%	724,285	14.76%	741,149
Amortization of Unfunded Liability	<u>32.80%</u>	<u>1,714,037</u>	<u>30.72%</u>	<u>1,652,866</u>
Total Employer Cost (Pension)	46.66%	2,438,322	45.48%	2,394,015
Health				
Normal Cost	0.45%	23,516	0.49%	24,816
Amortization of Unfunded Liability	<u>(0.44%)</u>	<u>(22,993)</u>	<u>(0.39%)</u>	<u>(20,984)</u>
Total Employer Cost (Health)	0.01%	523	0.10%	3,832
Total Employer Cost (Pension + Health)	46.67%	2,438,845	45.58%	2,397,847
Total Minimum Contribution Requirement (if applicable)	0.00%		0.00%	
Alternate Contribution Rate (ACR) *	32.80%		30.72%	
Underlying Payroll (as of valuation date)		5,049,007		5,022,683

* The Alternate Contribution Rate is the sum of the positive amortization rates for Tiers 1 & 2 Pension and Health and is charged when retirees return to active status.

The results above are shown both prior to and after the application of the statutory minimum contribution requirement of 8% of payroll (5% of payroll if the actual employer contribution is less than 5% for the 2006/2007 Fiscal Year) and are based on the current amortization schedule approved by the Board of Trustees for your individual plan (see "Actuarial Assumptions and Methods").

A.R.S. 38-843, subsection I allows for the employer to request a one-time increase in the amortization period up to a maximum of 30 years. The costs below are provided to assist with that decision, where needed. If the current approved amortization period is greater than those below, that request has already been made for this plan and the following is provided to facilitate earlier payoff, if desired.

	Rate	Dollar
Total Pension Employer Cost (25-year amortization)	38.08%	1,989,742
Total Pension Employer Cost (30-year amortization)	35.62%	1,861,570

Development of Employer Contributions – Tier 3 Members

Valuation Date	June 30, 2020	June 30, 2019
Applicable to Fiscal Year Ending	2022	2021

Defined Benefit (DB) Retirement Plan

	Rate	Dollar	Rate	Dollar
Pension				
Total Normal Cost	18.10%	\$ 193,843	18.41%	\$ 109,032
Amortization of Unfunded Liability	<u>0.00%</u>	<u>0</u>	<u>0.00%</u>	<u>0</u>
Total Pension Cost	18.10%	193,843	18.41%	109,032
Employee (EE) Pension Cost	9.05%	96,922	9.21%	54,516
Employer (ER) Pension Cost	9.05%	96,922	9.21%	54,516
Health				
Total Normal Cost	0.25%	2,677	0.28%	1,658
Amortization of Unfunded Liability	<u>0.00%</u>	<u>0</u>	<u>0.00%</u>	<u>0</u>
Total Health Cost	0.25%	2,677	0.28%	1,658
Employee (EE) Health Cost	0.13%	1,339	0.14%	829
Employer (ER) Health Cost	0.13%	1,339	0.14%	829
Total				
Total Calculated Tier 3 Required EE/ER Individual Cost	9.18%	98,261	9.35%	55,345
Board Approved Tier 3 Required EE/ER Individual Cost ¹	9.94%	106,453	9.94%	58,869
ER Legacy Cost of Tiers 1 & 2 Amort of Unfunded Liabilities ²	32.80%	351,274	30.72%	194,897
Total Calculated Tier 3 Required ER Defined Benefit Cost	41.98%	449,535	40.07%	250,242
Total Board Approved Tier 3 Required ER Defined Benefit Cost	42.74%	457,727	40.66%	253,766
Underlying Payroll (as of valuation date)		1,034,742		592,246

¹ The Board decided to keep Tier 3 rates level (as calculated with the June 30, 2019 valuation) for the fiscal year ending June 30, 2022.

² Pursuant to ARS § 38-843(B), the amortization of positive unfunded liabilities for Tiers 1 & 2 shall be applied to all Tier 3 payroll on a level percent basis. However, while it is statutorily required to present the rates in this manner, these are the minimums where alternate methods for paying down that unfunded liability is at the discretion of each employer. Further, to understand the effects of reform in relation to Tier 3, compare the total rate of Tier 3 before application of those legacy costs.

Development of Employer Contributions – Tier 3 Members

Valuation Date	June 30, 2020	June 30, 2019
Applicable to Fiscal Year Ending	2022	2021

Defined Contribution (DC) Retirement Plan

	Rate	Dollar	Rate	Dollar
Tier 2 & 3 DB / Non-Social Security				
Employee Cost	3.00%		3.00%	
Employer Cost ¹	3.00%		3.00%	
Tier 3 DC Only				
Employee Cost	9.00%	\$ 6,827	9.00%	\$ 6,088
Employee Disability Program Cost	<u>0.88%</u>	<u>668</u>	<u>1.41%</u>	<u>954</u>
Total Employee Cost	9.88%	7,495	10.41%	7,042
Employer Cost	9.00%	6,827	9.00%	6,088
Employer Disability Program Cost	<u>0.88%</u>	<u>668</u>	<u>1.41%</u>	<u>954</u>
Total Employer Cost (before Legacy)	9.88%	7,495	10.41%	7,042
ER Legacy Cost of Tiers 1 & 2 Amort of Unfunded Liabilities ²	32.80%	24,882	30.72%	20,780
Total Employer Cost	42.68%	32,377	41.13%	27,822
Underlying Payroll (as of valuation date)		73,295		63,145

¹ Employer rate is 4% for Tier 2 members for a period of time depending on the individual's membership date.

² Pursuant to ARS § 38-843(B), the amortization of positive unfunded liabilities for Tiers 1 & 2 shall be applied to all Tier 3 payroll on a level percent basis. However, while it is statutorily required to present the rates in this manner, these are the minimums where alternate methods for paying down that unfunded liability is at the discretion of each employer. Further, to understand the effects of reform in relation to Tier 3, compare the total rate of Tier 3 before application of those legacy costs.

Contribution Rate Summary

	Tier 1		Tier 2		Tier 3		
Membership Date On or After	7/1/1968	7/20/2011	1/1/2012		7/1/2017		
Participates in Social Security	N/A	N/A	Yes	No	Yes	No	N/A
Available Retirement Plan ¹	DB Only	DB Only	DB Only	Hybrid	DB Only	Hybrid	DC Only
Employee Contribution Rate							
PSPRS DB Rate	7.65%	11.65%	11.65%	11.65%	9.94%	9.94%	
PSPRS DC Rate				3.00%		3.00%	9.00%
PSPDCRP Disability Program Rate							0.88%
Total EE Contribution Rate	7.65%	11.65%	11.65%	14.65%	9.94%	12.94%	9.88%
Employer Contribution Rate							
PSPRS DB Normal Cost	14.31%	14.31%	14.31%	14.31%	9.94%	9.94%	
PSPRS DB Tier 1 & 2 Legacy Cost ²	32.36%	32.36%	32.36%	32.36%	32.80%	32.80%	32.80%
PSPRS DC Rate ³				4.00%		3.00%	9.00%
PSPDCRP Disability Program Rate							0.88%
Total ER Contribution Rate	46.67%	46.67%	46.67%	50.67%	42.74%	45.74%	42.68%

¹ Employers that pay into Social Security on behalf of their members do not participate in the Hybrid Plan.

² Per statute (ARS § 38-843(B)), any positive unfunded liability for Tiers 1 and 2 is to be applied to all Tier 3 (DB and DC) payrolls.

³ The 4.00% employer match for Tier 2 Hybrid members is for a short period of time depending on the membership date of the employee at which point the rate will change to 3.00% (ARS § 38-868(C)).

Exhibit summarizes employee and employer contributions based on Statute and the results of June 30, 2020 actuarial valuation. Pension and health components are combined, where applicable.

Impact of Additional Contributions

	Additional Contribution (000s)										
	\$0	\$1,000	\$2,000	\$3,000	\$4,000	\$5,000	\$6,000	\$7,000	\$8,000	\$9,000	\$10,000
Impact On											
Funded Status 06/30/2020	49.9%	52.0%	54.1%	56.2%	58.3%	60.3%	62.4%	64.5%	66.6%	68.7%	70.8%
FYE 2022 Contribution Rate	46.67%	45.09%	43.51%	41.93%	40.35%	38.77%	37.20%	35.62%	34.04%	32.46%	30.88%

Table shows the hypothetical change in the funded status and contribution rate from the June 30, 2020 actuarial valuation results for Tiers 1 & 2 if an additional contribution of the amount shown had been made to the Fund on June 30, 2020. This illustration can help estimate the impact of contributing additional monies to the fund in the future.

Historical Summary of Employer Rates

	Valuation Date June 30	Fiscal Year Ending June 30	Normal Cost	Pension		Health		Total
				Unfunded Amortization	Total	Unfunded Amortization	Total	
TIERS 1 & 2	2018	2020	14.70%	29.09%	43.79%	0.38%	0.00%	0.38%
	2019	2021	14.76%	30.72%	45.48%	0.49%	(0.39%)	0.10%
	2020	2022	13.86%	32.80%	46.66%	0.45%	(0.44%)	0.01%
TIER 3 ^{1, 2}	2018	2020	9.68%	0.00%	9.68%	0.26%	0.00%	0.26%
	2019	2021	9.68%	0.00%	9.68%	0.26%	0.00%	0.26%
	2020 ²	2022	9.05%	0.00%	9.05%	0.13%	0.00%	0.13%
	2020	2022	9.68%	0.00%	9.68%	0.26%	0.00%	0.26%

¹ Rates shown are Board approved EE/ER rates, unless otherwise noted. Does not reflect Legacy costs that the employer must also contribute.

² Rates shown are calculated EE/ER rates

III. LIABILITY SUPPORT

Liabilities and Funded Ratios by Benefit - Tiers 1 & 2

	June 30, 2020	June 30, 2019
Pension		
Actuarial Present Value of Benefits		
Retirees and Beneficiaries	\$ 24,994,758	\$ 23,862,960
DROP Members	3,374,252	3,142,465
Vested Members	659,231	502,140
Active Members	<u>28,053,595</u>	<u>26,954,499</u>
Total Actuarial Present Value of Benefits	57,081,836	54,462,064
Actuarial Accrued Liability (AAL)		
All Inactive Members	29,028,241	27,507,565
Active Members	<u>18,957,710</u>	<u>17,095,596</u>
Total Actuarial Accrued Liability	47,985,951	44,603,161
Actuarial Value of Assets (AVA)	23,954,831	21,683,873
Unfunded Actuarial Accrued Liability		
Gross Unfunded Actuarial Accrued Liability	24,031,120	22,919,288
Stabilization Reserve	<u>0</u>	<u>0</u>
Net Unfunded Actuarial Accrued Liability	24,031,120	22,919,288
Funded Ratio (AVA / AAL)	49.9%	48.6%
Health		
Present Value of Benefits		
Retirees and Beneficiaries	\$ 399,738	\$ 367,811
DROP Members	54,594	50,844
Active Members	<u>549,673</u>	<u>557,875</u>
Total Present Value of Benefits	1,004,005	976,530
Actuarial Accrued Liability (AAL)		
All Inactive Members	454,332	418,655
Active Members	<u>372,780</u>	<u>354,619</u>
Total Actuarial Accrued Liability	827,112	773,274
Actuarial Value of Assets (AVA)	1,125,355	1,086,386
Unfunded Actuarial Accrued Liability	(298,243)	(313,112)
Funded Ratio (AVA / AAL)	136.1%	140.5%

Liabilities and Funded Ratios by Benefit - Tier 3

	June 30, 2020	June 30, 2019
Pension		
Actuarial Present Value of Benefits		
Retirees and Beneficiaries	\$ 429,363	\$ 0
Vested Members	743,741	203,244
Active Members	<u>203,486,437</u>	<u>120,826,663</u>
Total Actuarial Present Value of Benefits	204,659,541	121,029,907
Actuarial Accrued Liability (AAL)		
All Inactive Members	1,173,104	203,244
Active Members	<u>22,066,495</u>	<u>7,753,481</u>
Total Actuarial Accrued Liability	23,239,599	7,956,725
Actuarial Value of Assets (AVA)	23,570,444	9,305,220
Unfunded Actuarial Accrued Liability	(330,845)	(1,348,495)
Funded Ratio (AVA / AAL)	101.4%	116.9%
Health		
Present Value of Benefits		
Retirees and Beneficiaries	0	0
Active Members	<u>2,785,857</u>	<u>1,814,082</u>
Total Present Value of Benefits	2,785,857	1,814,082
Actuarial Accrued Liability (AAL)		
All Inactive Members	0	0
Active Members	<u>353,563</u>	<u>136,597</u>
Total Actuarial Accrued Liability	353,563	136,597
Actuarial Value of Assets (AVA)	721,079	280,404
Unfunded Actuarial Accrued Liability	(367,516)	(143,807)
Funded Ratio (AVA / AAL)	203.9%	205.3%

The liabilities shown on this page are the liabilities for all Tier 3 members grouped together in the Risk Sharing group. These liabilities are NOT the liabilities for Asu Campus Police Tier 3 members.

Derivation of Experience (Gain)/Loss

	Tiers 1 & 2		Tier 3	
	Pension	Health	Pension	Health
(1) Unfunded Actuarial Accrued Liability as of June 30, 2019	22,919,288	(313,112)	(1,348,495)	(143,807)
(2) Normal Cost Developed in Last Valuation	741,149	24,816	4,806,265	73,059
(3) Actual Contributions	2,517,038	18,948	6,660,557	411,565
(4) Expected Interest On (1), (2), and (3)	1,636,958	(21,725)	13,589	(19,922)
(5) Expected Unfunded Actuarial Accrued Liability as of June 30, 2020 (1)+(2)-(3)+(4)	22,780,357	(328,969)	(3,189,198)	(502,235)
(6) Changes to UAAL Due to Assumptions, Methods and Benefits	0	0	0	0
(7) Change to UAAL Due to Actuarial (Gain)/Loss	<u>1,250,763</u>	<u>30,726</u>	<u>2,858,353</u>	<u>134,719</u>
(8) Unfunded Actuarial Accrued Liability as of June 30, 2020	24,031,120	(298,243)	(330,845)	(367,516)

Amortization of Unfunded Liabilities - Tiers 1 & 2

	Date Established	Outstanding Balance	Years Remaining	Amortization Rate
Pension	06/30/2019	23,100,878	16	30.33%
	06/30/2020	<u>1,511,335</u>	16	<u>2.47%</u>
	Total	24,612,213		32.80%
Health	06/30/2019	0	19	0.00%
	06/30/2020	<u>(298,243)</u>	20	<u>(0.44%)</u>
	Total	(298,243)		(0.44%)

Amortization of Unfunded Liabilities - Tier 3

	Date Established	Outstanding Balance	Years Remaining	Amortization Rate *
Pension	06/30/2018	166,947	8	0.03%
	06/30/2019	(1,419,864)	9	(0.24%)
	06/30/2020	<u>922,072</u>	10	<u>0.15%</u>
	Total	(330,845)		0.00%
Health	06/30/2018	(3,540)	8	0.00%
	06/30/2019	(129,816)	9	(0.02%)
	06/30/2020	<u>(234,160)</u>	10	<u>(0.04%)</u>
	Total	(367,516)		0.00%

* By Statute, negative amortization rates are not subtracted in Tier 3 rate calculations.

IV. ASSET SUPPORT

Statement of Changes in Fiduciary Net Position for Year Ended June 30, 2020 Market Value Basis

	Tiers 1 & 2		Tier 3	
	Pension	Health	Pension	Health
Additions				
Contributions				
Member Contributions	\$ 128,443,154	\$ 0	\$ 14,386,911	\$ 0
Employer Contributions	938,799,348	0	14,392,453	0
Health Insurance Contributions	<u>0</u>	<u>4,741,938</u>	<u>0</u>	<u>909,053</u>
Total Contributions	1,067,242,502	4,741,938	28,779,364	909,053
Investment Income				
Net Increase in Fair Value	58,711,963	1,945,052	350,525	8,778
Interest and Dividends	66,905,282	2,216,486	399,442	10,003
Other Income	26,056,951	1,568,972	155,567	7,081
Less Investment Expenses	<u>(49,802,841)</u>	<u>(1,555,022)</u>	<u>(297,336)</u>	<u>(7,018)</u>
Net Investment Income	101,871,355	4,175,488	608,198	18,844
Transfers In	379,476	0	155,830	0
Total Additions	1,169,493,333	8,917,426	29,543,392	927,897
Deductions				
Distributions to Members				
Benefit Payments	900,036,400	0	0	0
Health Insurance Subsidy	0	17,050,706	0	0
Refund of Contributions	<u>14,184,072</u>	<u>0</u>	<u>157,299</u>	<u>0</u>
Total Distributions	914,220,472	17,050,706	157,299	0
Administrative Expenses	8,356,791	339,564	49,892	1,532
Transfers Out	367,881	0	0	0
Other	0	0	0	0
Total Deductions	922,945,144	17,390,270	207,191	1,532
Net Increase / (Decrease)	246,548,189	(8,472,844)	29,336,201	926,365
Net Position Held in Trust				
Prior Valuation	7,810,990,750	336,551,716	18,922,750	554,433
Beginning of the Year Adjustment	(163)	163	163	(163)
End of the Year	8,057,538,776	328,079,035	48,259,114	1,480,635

Development of Pension Actuarial Value of Assets - Tiers 1 & 2

A. Investment Income

A1. Actual Investment Income	\$ 93,514,564
A2. Expected Amount for Immediate Recognition	575,689,672
A3. Amount Subject to Amortization	(482,175,108)

B. Amortization Schedule	Year Ended June 30						
	2020	2021	2022	2023	2024	2025	2026
2020 Experience (A3 / 7)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,160)
2019 Experience	(22,859,275)	(22,859,275)	(22,859,275)	(22,859,275)	(22,859,275)	(22,859,275)	
2018 Experience	(6,266,349)	(6,266,349)	(6,266,349)	(6,266,349)	(6,266,351)		
2017 Experience	33,380,149	33,380,149	33,380,149	33,380,148			
2016 Experience	(64,250,729)	(64,250,729)	(64,250,726)				
2015 Experience	(36,894,248)	(36,894,251)					
2014 Experience	33,458,496						
Total Amortization	(132,314,114)	(165,772,613)	(128,878,359)	(64,627,634)	(98,007,784)	(91,741,433)	(68,882,160)

C. Actuarial Value of Assets

	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	8,079,039,739	
C2. Noninvestment Net Cash Flow	153,033,625	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	8,675,448,922	
C4. Market Value of Assets, 06/30/2020	8,057,538,776	22,248,644
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	8,675,448,922	23,954,831

D. Rates of Return

D1. Market Value Rate of Return	1.2%
D2. Actuarial Value Rate of Return	5.4%

Development of Health Actuarial Value of Assets - Tiers 1 & 2

A. Investment Income

A1. Actual Investment Income	\$ 3,835,924
A2. Expected Amount for Immediate Recognition	24,126,918
A3. Amount Subject to Amortization	(20,290,994)

B. Amortization Schedule	Year Ended June 30						
	2020	2021	2022	2023	2024	2025	2026
2020 Experience (A3 / 7)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,716)
2019 Experience	(1,075,569)	(1,075,569)	(1,075,569)	(1,075,569)	(1,075,569)	(1,075,572)	
2018 Experience	(304,653)	(304,653)	(304,653)	(304,653)	(304,656)		
2017 Experience	1,532,136	1,532,136	1,532,136	1,532,136			
2016 Experience	(3,221,043)	(3,221,043)	(3,221,044)				
2015 Experience	(1,796,589)	(1,796,586)					
2014 Experience	1,653,381						
Total Amortization	(6,111,050)	(7,764,428)	(5,967,843)	(2,746,799)	(4,278,938)	(3,974,285)	(2,898,716)

C. Actuarial Value of Assets	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	350,002,781	
C2. Noninvestment Net Cash Flow	(12,308,768)	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	355,709,881	
C4. Market Value of Assets, 06/30/2020	328,079,035	1,037,939
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	355,709,881	1,125,355

D. Rates of Return

D1. Market Value Rate of Return	1.2%
D2. Actuarial Value Rate of Return	5.2%

Development of Pension Actuarial Value of Assets - Tiers 3

A. Investment Income	
A1. Actual Investment Income	\$ 558,306
A2. Expected Amount for Immediate Recognition	2,314,784
A3. Amount Subject to Amortization	(1,756,478)

B. Amortization Schedule	Year Ended June 30				
	2020	2021	2022	2023	2024
2020 Experience (A3 / 5)	(351,296)	(351,296)	(351,296)	(351,296)	(351,294)
2019 Experience	44,435	44,435	44,435	44,437	
2018 Experience	(370)	(370)	(371)		
2017 Experience	0	0			
2016 Experience	0				
Total Amortization	(307,231)	(307,231)	(307,232)	(306,859)	(351,294)

C. Actuarial Value of Assets	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	18,746,119	
C2. Noninvestment Net Cash Flow	28,777,895	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	49,531,567	
C4. Market Value of Assets, 06/30/2020	48,259,114	22,964,925
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	49,531,567	23,570,443

D. Rates of Return	
D1. Market Value Rate of Return	1.7%
D2. Actuarial Value Rate of Return	6.1%

Development of Health Actuarial Value of Assets - Tiers 3

A. Investment Income

A1. Actual Investment Income	\$ 17,312
A2. Expected Amount for Immediate Recognition	70,089
A3. Amount Subject to Amortization	(52,777)

B. Amortization Schedule	Year Ended June 30				
	2020	2021	2022	2023	2024
2020 Experience (A3 / 5)	(10,555)	(10,555)	(10,555)	(10,555)	(10,557)
2019 Experience	1,507	1,507	1,507	1,508	
2018 Experience	0	0	(2)		
2017 Experience	0	0			
2016 Experience	0				
Total Amortization	(9,048)	(9,048)	(9,050)	(9,047)	(10,557)

C. Actuarial Value of Assets	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	548,406	
C2. Noninvestment Net Cash Flow	909,053	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	1,518,500	
C4. Market Value of Assets, 06/30/2020	1,480,635	703,098
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	1,518,500	721,078

D. Rates of Return

D1. Market Value Rate of Return	1.7%
D2. Actuarial Value Rate of Return	6.1%

V. MEMBER STATISTICS

Valuation Data Summary

	June 30, 2020		June 30, 2019	
	Tiers 1 & 2	Tier 3	Tiers 1 & 2	Tier 3
Actives				
Number	56	18	61	12
Average Current Age	41.4	30.4	40.4	29.8
Average Age at Employment	29.4	29.3	29.4	29.1
Average Past Service	12.0	1.1	11.0	0.7
Average Annual Salary	\$84,587	\$54,182	\$79,955	\$49,354
Actives (transferred)				
Number	2	0	3	0
Average Current Age	33.8	N/A	32.9	N/A
Average Age at Employment	30.4	N/A	30.6	N/A
Average Past Service	3.4	N/A	2.3	N/A
Average Annual Salary	\$51,867	N/A	\$48,469	N/A
Retirees				
Number	29	0	28	0
Average Current Age	65.5	N/A	65.3	N/A
Average Annual Benefit	\$52,111	N/A	\$51,677	N/A
Drop Retirees				
Number	3	N/A	3	N/A
Average Current Age	52.4	N/A	51.4	N/A
Average Annual Benefit	\$62,926	N/A	\$62,926	N/A
Beneficiaries				
Number	6	0	6	0
Average Current Age	76.6	N/A	75.7	N/A
Average Annual Benefit	\$38,215	N/A	\$37,466	N/A
Disability Retirees				
Number	7	0	6	0
Average Current Age	56.8	N/A	54.8	N/A
Average Annual Benefit	\$37,717	N/A	\$37,876	N/A
Inactive / Vested				
Number	21	5	19	1
Average Current Age	43.7	32.7	43.6	45.7
Average Accumulated Contributions	\$6,736	\$2,370	\$5,795	\$697
Total Number	124	23	126	13
Former Members (transferred)	9	2	7	0

Counts and Pay Summary by Service - Tiers 1 & 2

Age	Past Service							Total Count	Total Pay	Average Pay
	0-4	5-9	10-14	15-19	20-24	25-29	30+			
<20	0	0	0	0	0	0	0	0	0	0
20 - 24	1	0	0	0	0	0	0	1	72,010	72,010
25 - 29	1	2	0	0	0	0	0	3	218,695	72,898
30 - 34	6	5	1	0	0	0	0	12	834,544	69,545
35 - 39	1	6	6	1	0	0	0	14	1,154,732	82,481
40 - 44	0	1	1	5	0	0	0	7	606,369	86,624
45 - 49	0	1	1	6	3	0	0	11	1,062,691	96,608
50 - 54	0	2	2	2	2	1	0	9	812,697	90,300
55 - 59	0	0	1	0	0	0	0	1	78,879	78,879
60 - 64	0	0	0	0	0	0	0	0	0	0
65+	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Total	9	17	12	14	5	1	0	58	4,840,617	83,459

Counts and Pay Summary by Service - Tier 3

Age	Past Service							Total Count	Total Pay	Average Pay
	0-4	5-9	10-14	15-19	20-24	25-29	30+			
15 - 19	0	0	0	0	0	0	0	0	0	0
20 - 24	3	0	0	0	0	0	0	3	164,031	54,677
25 - 29	7	0	0	0	0	0	0	7	350,777	50,111
30 - 34	5	0	0	0	0	0	0	5	254,319	50,864
35 - 39	1	0	0	0	0	0	0	1	64,721	64,721
40 - 44	1	0	0	0	0	0	0	1	59,551	59,551
45 - 49	1	0	0	0	0	0	0	1	81,881	81,881
50 - 54	0	0	0	0	0	0	0	0	0	0
55 - 59	0	0	0	0	0	0	0	0	0	0
60 - 64	0	0	0	0	0	0	0	0	0	0
65+	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Total	18	0	0	0	0	0	0	18	975,280	54,182

VI. ACTUARIAL ASSUMPTIONS AND METHODS

Interest Rate

This is the assumed earnings rate on System assets, compounded annually, net of investment and administrative expenses.

Tiers 1 & 2:

7.30% per year.

Tier 3:

7.00% per year.

Salary Increases

See table below. This is an annual increase for individual member’s salary. These rates, which are based on a 2017 experience study using actual plan experience, consist of 3.5% for wage inflation with the remaining portion for merit / seniority increases.

	Maricopa	Pima		Maricopa	Pima	
	County	County	Other	County	County	Other
Age	Police	Police	Police	Fire	Fire	Fire
20	7.50%	7.50%	7.50%	7.50%	7.50%	7.20%
25	7.14%	6.24%	6.60%	7.35%	6.36%	6.60%
30	6.00%	5.16%	5.25%	6.74%	5.48%	5.60%
35	4.77%	4.55%	4.15%	5.56%	4.83%	4.96%
40	3.90%	3.89%	3.60%	4.46%	4.03%	4.44%
45	3.54%	3.56%	3.50%	3.74%	3.60%	3.78%
50+	3.50%	3.50%	3.50%	3.50%	3.50%	3.50%

Inflation

2.50%.

Tier 3 Compensation Limit

\$110,000 for calendar 2020. Assumed increases of 2.00% per year thereafter.

Cost-of-Living Adjustment

1.75%.

Mortality Rates

These rates are used to project future decrements from the population due to death.

Active Lives:

PubS-2010 Employee mortality, loaded 110% for males and females, projected with future mortality improvements reflected generationally using 75% of scale MP-2019. 100% of active deaths are assumed to be in the line of duty.

Inactive Lives

PubS-2010 Healthy Retiree mortality, loaded 110% for males and females, projected with future mortality improvements reflected

generationally using 75% of scale MP-2019.

Beneficiaries:

PubS-2010 Survivor mortality, projected with future mortality improvements reflected generationally using 75% of scale MP-2019.

Disabled Lives:

PubS-2010 Disabled mortality, projected with future mortality improvements reflected generationally using 75% of scale MP-2019.

The mortality assumptions sufficiently accommodate anticipated future mortality improvements.

Retirement / DROP Rates

These rates are used to project future decrements from the active population due to retirement. The rates below are based on a 2017 experience study using actual plan experience.

Tier 1 – reaching age 62 before attaining 20 years of service:

Age-related rates based on age at retirement: 60% assumed at age 62, 50% assumed at ages 63 – 69, and 100% assumed at age 70. Rates are the same for all employers.

Tier 1 – reaching age 62 after attaining 20 years of service:

Service-related rates based on service at retirement:

	Maricopa County	Pima County	Other	Maricopa County	Pima County	Other
<u>Service</u>	<u>Police</u>	<u>Police</u>	<u>Police</u>	<u>Fire</u>	<u>Fire</u>	<u>Fire</u>
20	27%	24%	35%	14%	18%	23%
21	18%	19%	30%	14%	18%	18%
22	14%	14%	23%	7%	11%	11%
23	10%	10%	10%	7%	7%	8%
24	8%	7%	10%	7%	7%	5%
25	38%	32%	36%	22%	22%	30%
26	36%	32%	30%	26%	26%	30%
27	29%	22%	30%	19%	19%	30%
28	29%	22%	30%	32%	25%	25%
29	29%	22%	30%	30%	25%	16%
30	34%	35%	30%	30%	30%	32%
31	34%	35%	30%	30%	30%	35%
32	65%	65%	70%	55%	55%	60%
33	65%	65%	70%	55%	55%	60%
34+	100%	100%	100%	100%	100%	100%

60% are assumed to enter the DROP program while the remaining 40% are assumed to retire and commence benefits immediately.

Tiers 2 & 3:

Age-related rates based on age at retirement:

Age	Maricopa	Pima	Other	Maricopa	Pima	Other
	County	County		County	County	
	Police	Police	Police	Fire	Fire	Fire
53	38%	32%	36%	22%	22%	30%
54	36%	32%	30%	26%	26%	30%
55	29%	22%	30%	19%	19%	30%
56	29%	22%	30%	32%	25%	25%
57	29%	22%	30%	30%	25%	16%
58	34%	35%	30%	30%	30%	32%
59	34%	35%	30%	30%	30%	35%
60-63	65%	65%	70%	55%	55%	60%
64+	100%	100%	100%	100%	100%	100%

Termination Rate

These rates are used to project future decrements from the active population due to termination. Service-related rates based on service at termination are shown below. The rates below apply to members prior to retirement eligibility and are based on a 2017 experience study using actual plan experience.

Service	Maricopa	Pima	Other	Maricopa	Pima	Other
	County	County		County	County	
	Police	Police	Police	Fire	Fire	Fire
1	14.00%	16.00%	16.00%	7.00%	10.00%	9.50%
2	8.50%	9.00%	12.50%	4.50%	5.00%	9.00%
3	6.50%	7.50%	11.50%	3.70%	5.00%	7.50%
4	4.50%	6.00%	9.00%	3.00%	4.00%	7.50%
5	3.60%	6.00%	8.00%	2.50%	4.00%	6.50%
6	3.30%	4.50%	8.00%	1.70%	3.50%	4.50%
7	3.30%	4.50%	7.00%	1.70%	3.00%	4.00%
8	3.30%	3.20%	7.00%	1.70%	2.40%	3.50%
9	2.70%	3.20%	6.50%	1.70%	2.40%	3.50%
10	2.70%	3.20%	6.00%	1.50%	2.40%	3.00%
11	2.70%	3.20%	5.00%	1.10%	2.40%	2.70%
12	1.80%	1.40%	4.00%	0.70%	1.00%	2.00%
13	1.30%	1.40%	3.50%	0.70%	1.00%	2.00%
14	1.30%	1.40%	3.00%	0.70%	1.00%	1.70%
15	1.30%	1.00%	3.00%	0.60%	1.00%	1.20%
16	0.70%	1.00%	2.00%	0.50%	1.00%	1.20%
17	0.70%	1.00%	1.75%	0.50%	0.50%	1.20%
18	0.70%	1.00%	1.75%	0.40%	0.50%	1.20%
19	0.50%	1.00%	1.75%	0.40%	0.50%	1.20%
20+	0.50%	1.00%	1.75%	0.40%	0.50%	0.50%

Disability Rate

These rates are used to project future decrements from the active population due to disability. Sample age-related rates based on age at disability are provided below. These rates are based on a 2017 experience study using actual plan experience. 100% of disablements are assumed to be duty-related.

<u>Age</u>	<u>Maricopa</u>	<u>Pima</u>	<u>Other</u>	<u>Maricopa</u>	<u>Pima</u>	<u>Other</u>
	<u>County</u>	<u>County</u>		<u>County</u>	<u>County</u>	
	<u>Police</u>	<u>Police</u>	<u>Police</u>	<u>Fire</u>	<u>Fire</u>	<u>Fire</u>
20	0.08%	0.08%	0.10%	0.03%	0.03%	0.03%
25	0.08%	0.08%	0.10%	0.03%	0.03%	0.03%
30	0.17%	0.16%	0.20%	0.04%	0.03%	0.03%
35	0.22%	0.21%	0.26%	0.09%	0.07%	0.08%
40	0.36%	0.35%	0.44%	0.17%	0.16%	0.17%
45	0.51%	0.49%	0.62%	0.17%	0.43%	0.48%
50	0.78%	0.75%	0.95%	0.43%	0.59%	0.65%
55	1.02%	0.98%	1.23%	1.00%	1.01%	1.13%

Marital Status

For active members, 85% of males and 60% of females are assumed to be married. Actual marital status is used, where applicable, for inactive members.

Spouse’s Age

Males are assumed to be three years older than females.

Health Care Utilization

For active members, 70% of retirees are expected to utilize retiree health care. Actual utilization is used for inactive members.

Funding Method

Entry Age Normal Cost Method.

Actuarial Asset Method

Method described below. Note that during periods when investment performance exceeds (falls short) of the assumed rate, the actuarial value of assets will tend to be less (greater) than the market value of assets.

Tiers 1 & 2:

Each year the assumed investment income is recognized in full while the difference between actual and assumed investment income are smoothed over a 7-year period subject to a 20% corridor around the market value.

Tier 3:

Each year the assumed investment income is recognized in full while the difference between actual and assumed investment income are smoothed over a 5-year period subject to a 20% corridor around the market value.

Funding Policy Amortization Method

Tiers 1 & 2:

Any positive UAAL (assets less than liabilities) is amortized using a layered approach beginning with the June 30, 2020 valuation, with new amounts determined according to a Level Dollar method over a closed period of 15 years (phased into from current period of at most 30 years). Initial layer from June 30, 2019 valuation continues to be amortized according to a Level Percentage of Payroll method. Any negative UAAL (assets greater than liabilities) is amortized according to a Level Dollar method over an open period of 20 years.

Tier 3:

Any positive UAAL (assets less than liabilities) is amortized according to a Level Dollar method over a closed period of 10 years. No amortization is made of any negative UAAL (assets greater than liabilities).

Payroll Growth

3.50% per year. This is annual increase for total employer payroll.

Stabilization Reserve

Beginning with the June 30, 2007 valuation and with each subsequent valuation, if the actuarial value of assets exceeds the actuarial accrued liability, one half of this excess in each year is allocated to a Stabilization Reserve. This Reserve is excluded from the calculation of the employer contribution rates. The Reserve accumulates as long as the plan is overfunded. Once the plan becomes underfunded, the Stabilization Reserve will be used to dampen increases in the employer contribution rates.

Changes to Actuarial Assumptions and Methods Since the Prior Valuation

The amortization method was changed for Tiers 1 and 2 to use a layered amortization approach.

VII. DISCUSSION OF RISK

ASOP No. 51, Assessment and Disclosure of Risk Associated with Measuring Pension Obligations and Determining Pension Plan Contributions, states that the actuary should identify risks that, in the actuary's professional judgment, may reasonably be anticipated to significantly affect the plan's future financial condition.

Throughout this report, actuarial results are determined under various assumption scenarios. These results are based on the premise that all future plan experience will align with the plan's actuarial assumptions; however, there is no guarantee that actual plan experience will align with the plan's assumptions. Whenever possible, the recommended assumptions in this report reflect conservatism to allow for some margin of unfavorable future plan experience. However, it is still possible that actual plan experience will differ from anticipated experience in an unfavorable manner that will negatively impact the plan's funded position.

Below are examples of ways in which plan experience can deviate from assumptions and the potential impact of that deviation. Typically, this results in an actuarial gain or loss representing the current-year financial impact on the plan's unfunded liability of the experience differing from assumptions; this gain or loss is amortized over a period of time determined by the plan's amortization method. When assumptions are selected that adequately reflect plan experience, gains and losses typically offset one another in the long term, resulting in a relatively low impact on the plan's contribution requirements associated with plan experience. When assumptions are too optimistic, losses can accumulate over time and the plan's amortization payment could potentially grow to an unmanageable level.

- **Investment Return:** When the rate of return on the Actuarial Value of Assets falls short of the assumption, this produces a loss representing assumed investment earnings that were not realized. Further, it is unlikely that the plan will experience a scenario that matches the assumed return in each year as capital markets can be volatile from year to year. Therefore, contribution amounts can vary in the future.
- **Salary Increases:** When a plan participant experiences a salary increase that was greater than assumed, this produces a loss representing the cost of an increase in anticipated plan benefits for the participant as compared to the previous year. The total gain or loss associated with salary increases for the plan is the sum of salary gains and losses for all active participants.
- **Payroll Growth:** The plan's payroll growth assumption, if one is used, causes a predictable annual increase in the plan's amortization payment in order to produce an amortization payment that remains constant as a percentage of payroll if all assumptions are realized. If payroll does not increase according to the plan's payroll growth assumption, the plan's amortization payment can increase significantly as a percentage of payroll even if all assumptions other than the payroll growth assumption are realized.
- **Demographic Assumptions:** Actuarial results take into account various potential events that could happen to a plan participant, such as retirement, termination, disability, and death. Each of these potential events is assigned a liability based on the likelihood of the event and the financial consequence of the event for the plan. Accordingly, actuarial liabilities reflect a blend of financial consequences associated with various possible outcomes (such as retirement at one of various possible ages). Once the outcome is known (e.g. the participant retires) the liability is adjusted to reflect the known outcome. This adjustment

produces a gain or loss depending on whether the outcome was more or less favorable than other outcomes that could have occurred.

- **Contribution risk:** This risk results from the potential that actual employer contributions may deviate from actuarially determined contributions, which are determined in accordance with the Board’s funding policy. The funding policy is intended to result in contribution requirements that if paid when due, will result in a reasonable expectation that assets will accumulate to be sufficient to pay plan benefits when due. Contribution deficits, particularly large deficits and those that occur repeatedly, increase future contribution requirements and put the plan at risk for not being able to pay plan benefits when due.

Impact of Plan Maturity on Risk

For newer pension plans, most of the participants and associated liabilities are related to active members who have not yet reached retirement age. As pension plans continue in operation and active members reach retirement ages, liabilities begin to shift from being primarily related to active members to being shared amongst active and retired members. Plan maturity is a measure of the extent to which this shift has occurred. It is important to understand that plan maturity can have an impact on risk tolerance and the overall risk characteristics of the plan. For example, plans with a large amount of retired liability do not have as long of a time horizon to recover from losses (such as losses on investments due to lower than expected investment returns) as plans where the majority of the liability is attributable to active members. For this reason, less tolerance for investment risk may be warranted for highly mature plans with a substantial inactive liability. Similarly, mature plans paying substantial retirement benefits resulting in a small positive or net negative cash flow can be more sensitive to near term investment volatility, particularly if the size of the fund is shrinking, which can result in less assets being available for investment in the market.

To assist with determining the maturity of the plan, we have provided some relevant metrics in the table following titled “Plan Maturity Measures and Other Risk Metrics.” For a better understanding of the overall Plan and the impact of these risks, please refer to the consolidated PSPRS valuation report.

Plan Maturity Measures and Other Risk Metrics

	Tiers 1 & 2			Tier 3 ¹		
	06/30/2018	06/30/2019	06/30/2020	06/30/2018	06/30/2019	06/30/2020
Support Ratio						
Total Actives	67	64	58	419	944	1,408
Total Inactives	66	62	66	23	57	130
Actives / Inactives	101.5%	103.2%	87.9%	1,821.7%	1,656.1%	1,083.1%
Asset Volatility Ratio						
Market Value of Assets (MVA)		20,964,439	22,248,644		9,392,896	22,964,925
Total Annual Payroll		5,022,683	4,840,617		50,420,565	84,448,996
MVA / Total Annual Payroll		417.4%	459.6%		18.6%	27.2%
Accrued Liability (AL) Ratio						
Inactive Accrued Liability	24,911,637	27,507,565	29,028,241		203,244	1,173,104
Total Accrued Liability	39,772,303	44,603,161	47,985,951		7,956,725	23,239,599
Inactive AL / Total AL	62.6%	61.7%	60.5%		2.6%	5.0%
Funded Ratio						
Actuarial Value of Assets (AVA)	19,453,726	21,683,873	23,954,831	1,635,349	9,305,220	23,570,444
Total Accrued Liability	39,772,303	44,603,161	47,985,951	1,831,715	7,956,725	23,239,599
AVA / Total Accrued Liability	48.9%	48.6%	49.9%	89.3%	116.9%	101.4%
Net Cash Flow Ratio						
Net Cash Flow ²		947,316	1,036,679		7,281,178	13,192,598
Market Value of Assets (MVA)		20,964,439	22,248,644		9,392,896	22,964,925
Net Cash Flow / MVA		4.5%	4.7%		77.5%	57.4%

¹ Tier 3 results are shown for the Risk Sharing group, where applicable.

² Determined as total contributions minus benefit payments. Administrative expenses are typically included but are considered part of the net interest rate assumption for this plan.

VIII. SUMMARY OF CURRENT PLAN

The following is a summary of the benefit provisions provided in Title 38, Chapter 5, Article 4 of the Arizona Revised Statutes.

Membership

Full-time employees of an eligible group, prior to attaining age 65, who are engaged to work for more than six months in a calendar year.

Benefit Tiers

Benefits differ for members based on their hire date:

<u>Tier</u>	<u>Hire Date</u>
1	Hired before January 1, 2012
2	Hired on or after January 1, 2012 but before July 1, 2017
3	Hired on or after July 1, 2017

Compensation

Compensation is the amount including base salary, overtime pay, shift and military differential pay, compensatory time used in lieu of overtime pay, and holiday pay, paid to an employee on a regular payroll basis and longevity pay paid at least every six months for which contributions are made to the System. For Tier 3 members, compensation is limited by statutory cap (\$110,000 with adjustments by the Board).

Average Monthly Benefit Compensation

Tier 1:

The highest compensation paid to member during three consecutive years out of the last 20 years of Credited Service, divided by months.

Tier 2:

The highest compensation paid to member during five consecutive years out of the last 20 years of Credited Service, divided by months.

Tier 3:

The highest compensation paid to member during five consecutive years out of the last 15 years of Credited Service, divided by months.

Credited Service

Total periods of service, both before and after the member's date of participation, for which the member made contributions to the fund.

Normal Retirement Date

Tier 1:

First day of month following attainment of 1) 20 years of service or 2) 62nd birthday and completion of 15 years of service.

Tier 2:

First day of month following the attainment of age 52.5 and completion of 15 years of service.

Tier 3:

First day of month following the attainment of age 55 and completion of 15 years of service.

Benefit

Tier 1:

50% of Average Monthly Benefit Compensation, adjusted based on Credited Service as follows (maximum benefit of 80% of Average Monthly Benefit Compensation):

<u>Credited Service</u>	<u>Benefit Adjustment</u>
15 years, but less than 20	Reduced 4% per year less than 20
20 years, but less than 25	Plus 2% per year between 20 and 25
25+ years	Plus 2.5% per year above 20

Tier 2:

Benefit multiplier (below) times Average Monthly Benefit Compensation times Credited Service (maximum benefit of 80% of Average Monthly Benefit Compensation):

<u>Credited Service</u>	<u>Benefit Multiplier</u>
15 years, but less than 17	1.50%
17 years, but less than 19	1.75%
19 years, but less than 22	2.00%
22 years, but less than 25	2.25%
25+ years	2.50%

Tier 3:

Benefit multiplier (below) times Average Monthly Benefit Compensation times Credited Service (maximum benefit of 80% of Average Monthly Benefit Compensation):

<u>Credited Service</u>	<u>Benefit Multiplier</u>
15 years, but less than 17	1.50%
17 years, but less than 19	1.75%
19 years, but less than 22	2.00%
22 years, but less than 25	2.25%
25+ years	2.50%

Form of Benefit

For married retirees, an annuity payable for the life of the member with 80% continuing to the eligible spouse upon death. For unmarried retirees, the normal form is a single life annuity.

Early Retirement

Date	Only applicable to Tier 3 members: Attainment of age 52.5 and 15 years of Credited Service.
Benefit	Actuarial equivalent of Normal Retirement benefit.

Disability Benefit – Accidental (duty-related)

Eligibility	Total and permanent disability incurred in performance of duty.
Benefit Amount	A maximum of: a.) 50% of Average Monthly Benefit Compensation, and; b.) The monthly Normal Retirement pension that the member is entitled to receive if he or she retired immediately.

Disability Benefit – Ordinary (not duty-related)

Eligibility	Total and permanent disability not incurred in performance of duty.
Benefit Amount	Normal Retirement pension that the member is entitled to receive prorated on Credited Service (maximum 20 years) over 20.

Disability Benefit – Other

Temporary	Benefit equals 1/12 of 50% of compensation during year preceding date of disability. Payments terminate after 12 months.
Catastrophic	Benefit equals 90% of Average Monthly Benefit Compensation. After 60 months member receives greater of 62.5% Average Monthly Benefit Compensation and accrued normal pension.

Pre-Retirement Death Benefit

Service Incurred	100% of Average Monthly Benefit Compensation, reduced by child's pension.
Non-Service Incurred	80% of benefit based on calculation for accidental disability retirement.
Child's Pension	10% of pension for each child (maximum 20% paid) based on calculation for accidental disability retirement. Payable to dependent child under age 18 (23, if full-time student).
Guardian's Pension	Same as spouse's pension. Payable (along with child's pension) when no spouse is being paid and there is at least one child under 18 (23, if full-time student).

Vesting (Termination)

Vesting Service Requirement	Tier 1: 10 years of Credited Service.
-----------------------------	---

Tiers 2 & 3:
15 years of Credited Service.

Non-Vested Benefit

Tier 1:
Lump sum payment of accumulated contributions, plus additional amount based on years of Credited Service.

<u>Service</u>	<u>Additional % of Contributions</u>
Less than 5 years	0%
5 years	25%
6 years	40%
7 years	55%
8 years	70%
9 years	85%
10+ years	100%

Tiers 2 & 3:
Lump sum payment of accumulated contributions, with interest at rate determined by the Board.

Vested Benefit

Tier 1:
Deferred retirement annuity based on two times member's accumulated contributions, deferred to age 62. Member is not entitled to survivor benefits, benefit increases, or group health insurance subsidy.

Tiers 2 & 3:
Calculated same as normal retirement pension. Payable if contributions left in fund until reach age requirement. Member is entitled to survivor benefits, benefit increases, and group health insurance subsidy.

Cost-of-Living Adjustment

Payable to retired member or survivor of retired member

Tiers 1 & 2:
Compound cost-of-living adjustment on base benefit. First payment is made on July 1, 2018, with annual adjustments effective every July 1 thereafter.

Cost-of-living adjustment will be based on the average annual percentage change in the Metropolitan Phoenix-Mesa Consumer Price Index published by the United States Department of Labor, Bureau of Statistics. Maximum increase of 2%.

Tier 3:

Compound cost-of-living adjustment on base benefit beginning earlier of first calendar year after the 7th anniversary of retirement or when the retired member reaches 60 years of age.

A cost-of-living adjustment shall be paid on July 1 each year that the funded ratio for members hired on or after July 1, 2017 is 70% or more.

The cost-of-living adjustment will be based on the average annual percentage change in the Metropolitan Phoenix-Mesa Consumer Price Index published by the United States Department of Labor, Bureau of Statistics. The cost-of-living adjustment will not exceed:

- 2%, if funded ratio for members who are hired on or after July 1, 2017 is 90% or more;
- 1.5%, if funded ratio for members who are hired on or after July 1, 2017 is 80-90%;
- 1%, if funded ratio for members who are hired on or after July 1, 2017 is 70-80%.

Deferred Retirement Option Plan (DROP):

Eligibility	Tier 1 and 20 years of Credited Service.	
DRO Period	Maximum 60 months.	
Member Contributions	Cease upon DROP entry.	
Benefit Amount	Calculated based on Credited Service and average monthly compensation as of the beginning of the DROP period, credited to DROP participation account for DROP period.	
Interest on DROP Participation Account	<u>Beginning Year</u>	<u>Interest Rate</u>
	July 1, 2015	7.50%
	July 1, 2016	7.40%
	July 1, 2017	7.40%
	July 1, 2018	7.30%
	July 1, 2019	7.30%
Payment of DROP Participation Account	Payable as lump sum distribution to Public Safety Personnel Defined Contribution Retirement Plan at end of DROP period or at termination.	
Payment Monthly Benefit	System commences payment of benefit amount at the earlier of 1) the end of the DROP period and 2) at termination.	

Post-Retirement Health Insurance Subsidy

Eligibility Retired member or survivor who elect health coverage provided by the state or participating employer.

Maximum Subsidy Amounts (monthly)	<u>Member Only</u>		<u>With Dependents</u>
	Medicare Eligible	\$100	
One w/ Medicare	N/A		\$215
Not Medicare Eligible	\$150		\$260

Employee Contributions

Members hired before July 20, 2011:

7.65%

Members hired on/after July 20, 2011, but before July 1, 2017:

11.65%. Amounts in excess of 7.65% are not used to reduce the employer contribution (“maintenance of effort”).

Tier 3:

50% of total contribution, which is Normal Cost plus a level-dollar amortization of unfunded actuarial accrued liability over a closed period not to exceed 10 years.

Employer Contributions

Tiers 1 & 2:

Normal Cost plus amortization of unfunded actuarial accrued liability over a closed period not to exceed 20 years (subject to one-time election to extend to closed period not to exceed 30 years). Contribution will never be less than 8% of payroll.

Tier 3:

50% of total contribution, which is Normal Cost plus a level-dollar amortization of unfunded actuarial accrued liability over a closed period not to exceed 10 years.

Changes to Benefit Provisions Since the Prior Valuation

None.

IX. ACTUARIAL FUNDING POLICY

The purpose of this Actuarial Funding Policy is to record the funding objectives and policy set by the Board for the Arizona Public Safety Personnel Retirement System (PSPRS). The Board establishes this Funding Policy to help ensure the systematic funding of future benefit payments for members of the Retirement System.

This funding policy was reviewed by the Board annually for several years following initial adoption until the 2017 experience study. Subsequently, it shall be reviewed every five years in conjunction with the experience study, although some adjustments may be warranted sooner to properly reflect Tier 3 benefits and changes to amortization methodology.

Funding Objectives

1. Maintain adequate assets so that current plan assets plus future contributions and investment earnings are sufficient to fund all benefits expected to be paid to members and their beneficiaries.
2. Maintain stability of employer contribution rates, consistent with other funding objectives.
3. Maintain public policy goals of accountability and transparency. Each policy element is clear in intent and effect, and each should allow an assessment of whether, how and when the funding requirements of the plan will be met.
4. Promote intergenerational equity. Each generation of members and employers should incur the cost of benefits for the employees who provides services to them, rather than deferring those costs to future members and employers.
5. Provide a reasonable margin for adverse experience to help offset risks.
6. Continue progress of systematic reduction of the Unfunded Actuarial Accrued Liability (UAAL).

Elements of Actuarial Funding Policy

1. Actuarial Cost Method

- a. The Entry Age Normal level percent of pay actuarial cost method of valuation shall be used in determining the Actuarial Accrued Liability (AAL) and Normal Cost. Differences in the past between assumed experience and actual experience (“actuarial gains and losses”) shall become part of the AAL. The Normal Cost shall be determined on an individual basis for each active member.

2. Asset Smoothing Method

- a. The investment gains or losses of each valuation period, resulting from the difference between the actual investment return and assumed investment return, shall be recognized annually in level amounts over seven years in calculating the Actuarial Value of Assets.
- b. The Actuarial Value of Assets so determined shall be subject to a 20% corridor relative to the Market Value of Assets.

3. Amortization Method

- a. The Actuarial Value of Assets are subtracted from the computed AAL. Any unfunded amount is amortized as a level percent of payroll over a closed period. If the Actuarial Value of Assets exceeds the AAL, the excess is amortized over an open period of 20 years and applied as a credit to reduce the Normal Cost otherwise payable.

4. Funding Target

- a. The targeted funded ratio shall be 100%.
- b. The maximum amortization period shall be 30 years.
- c. If the funding ratio is between 100% and 120%, a minimum contribution equal to the Normal Cost will be made.

5. Risk Management

- a. Assumption Changes
 - i. The actuarial assumptions used shall be those last adopted by the PSPRS Board based on the most recent experience study and upon the advice and recommendation of the actuary. In accordance with best practices, the actuary shall conduct an experience study every five years. The results of the study shall be the basis for the actuarial assumption changes recommended to the PSPRS Board.
 - ii. The actuarial assumptions can be updated during the five-year period if significant plan design changes or other significant events occur, as advised by the actuary.
- b. Amortization Method
 - i. The amortization method, Level Percent Closed, will ensure full payment of the UAAL over a finite, systematically decreasing period not to exceed 30 years. The amortization period will be reviewed once the period reaches 15 years.
- c. Risk Measures
 - i. The following risk measures will be annually determined to provide quantifiable measurements of risk and their movement over time.
 1. Classic measures currently determined
 - Funded ratio (assets / liability)
 2. UAAL / Total Payroll
 - Measures the risk associated with contribution decreases relative impact on the ability to fund the UAAL. An increase in this measure indicates an increase in contribution risk.
 3. Total Liability / Total Payroll
 - Measures the risk associated with the ability to respond to liability experience through adjustments in contributions. An increase in this measure indicates an increase in experience risk.

X. GLOSSARY

Actuarial Accrued Liability – Computed differently under different funding methods, the actuarial accrued liability generally represents the portion of the actuarial present value of benefits attributable to service credit earned (or accrued) as of the valuation date.

Actuarial Present Value of Benefits – Amount which, together with future interest, is expected to be sufficient to pay all benefits to be paid in the future, regardless of when earned, as determined by the application of a particular set of actuarial assumptions; equivalent to the actuarial accrued liability plus the present value of future normal costs attributable to the members.

Actuarial Assumptions – Assumptions as to the occurrence of future events affecting pension costs. These assumptions include rates of investment earnings, changes in salary, rates of mortality, withdrawal, disablement, and retirement as well as statistics related to marriage and family composition.

Actuarial Cost Method – A method of determining the portion of the cost of a pension plan to be allocated to each year; sometimes referred to as the "actuarial funding method." Each cost method allocates a certain portion of the actuarial present value of benefits between the actuarial accrued liability and future normal costs.

Actuarial Equivalence – Series of payments with equal actuarial present values on a given date when valued using the same set of actuarial assumptions.

Actuarial Present Value - The amount of funds required as of a specified date to provide a payment or series of payments in the future. It is determined by discounting future payments at predetermined rates of interest, and by probabilities of payments between the specified date and the expected date of payment.

Actuarial Value of Assets – The value of cash, investments, and other property belonging to the pension plan as used by the actuary for the purpose of the actuarial valuation. This may correspond to market value of assets, or some modification using an asset valuation method to reduce the volatility of asset values.

Asset Gain (Loss) – That portion of the actuarial gain attributable to investment performance above (below) the expected rate of return in the actuarial assumptions.

Amortization – Paying off an interest-discounted amount with periodic payments of interest and (generally) principal, as opposed to paying off with a lump sum payment.

Amortization Payment – That portion of the pension plan contribution designated to pay interest and reduce the outstanding principal balance of unfunded actuarial accrued liability. If the amortization payment is less than the accrued interest on the unfunded actuarial accrued liability the outstanding principal balance will increase.

Assumed Earnings Rate – The interest rate used in developing present values to reflect the time value of money.

Decrements – Events which result in the termination of membership in the system such as retirement, disability, withdrawal, or death.

Entry Age Normal (EAN) Funding Method – A standard actuarial funding method whereby each member's normal costs (service costs) are generally level as a percentage of pay from entry age until retirement. The annual cost of benefits is comprised of the normal cost plus an amortization payment to reduce the UAL.

Experience Gain (Loss) – The difference between actual unfunded actuarial accrued liabilities and anticipated unfunded actuarial accrued liabilities during the period between two valuation dates. It is a measurement of the difference between actual and expected experience, and may be related to investment earnings above (or below) those expected or changes in the liability due to fewer (or greater) than expected numbers of retirements, deaths, disabilities, or withdrawals, or variances in pay increases relative to assumed pay increases. The effect of such gains (or losses) is to decrease (or increase) future costs.

Funded Ratio – A measure of the ratio of the actuarial value of assets to liabilities of the system. Typically, the assets used in the measure are the actuarial value of assets as determined by the asset valuation method. The funded ratio depends not only on the financial strength of the plan but also on the asset valuation method used to determine the assets and on the funding method used to determine the liabilities.

Market Value of Assets (MVA) – The value of assets as they would trade on an open market.

Normal Cost – Computed differently under different funding methods, generally that portion of the actuarial present value of benefits allocated to the current plan year.

Unfunded Actuarial Accrued Liability (UAAL) – The excess of the actuarial accrued liability over the valuation assets; sometimes referred to as "unfunded past service liability". UAL increases each time an actuarial loss occurs and when new benefits are added without being fully funded initially and decreases when actuarial gains occur.

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**ARIZONA PUBLIC SAFETY PERSONNEL
RETIREMENT SYSTEM**

NAU CAMPUS POLICE (056)

ACTUARIAL VALUATION
AS OF JUNE 30, 2020

CONTRIBUTIONS APPLICABLE TO THE
PLAN/FISCAL YEAR ENDING JUNE 30, 2022



FOSTER & FOSTER
ACTUARIES AND CONSULTANTS

December 2020

Board of Trustees
Arizona Public Safety Personnel Retirement System
Phoenix, AZ

Re: Actuarial Valuation Report as of June 30, 2020 for NAU Campus Police (056)

Dear Members of the Board:

We are pleased to present to the Board this report of the annual actuarial valuation of the Arizona Public Safety Personnel Retirement System (PSPRS). The valuation was performed to determine whether the assets and contributions are sufficient to provide the prescribed benefits and to develop the appropriate funding requirements for the applicable plan year.

This report was prepared at the request of the Board and is intended for use by PSPRS and those designated or approved by the Board. It documents the valuation of the consolidated plan and provides summary information for PSPRS participating employers. This report may be provided to parties other than PSPRS only in its entirety and only with the permission of the Board. Foster & Foster is not responsible for the unauthorized use of this report.

The valuation has been conducted in accordance with generally accepted actuarial principles and practices, including the applicable Actuarial Standards of Practice as issued by the Actuarial Standards Board, and reflects laws and regulations issued to date pursuant to the provisions of Title 38, Chapter 5, Article 4 of the Arizona Revised Statutes, as well as applicable federal laws and regulations. In our opinion, the assumptions used in this valuation, as adopted by the Board of Trustees, represent reasonable expectations of anticipated plan experience. Future actuarial measurements may differ significantly from the current measurements presented in this report for a variety of reasons including changes in applicable laws, changes in plan provisions, changes in assumptions, or plan experience differing from expectations. Due to the limited scope of the valuation, we did not perform an analysis of the potential range of such future measurements.

The computed contribution rates shown in the "Contribution Results" section should be considered minimum contribution rates that comply with the Board's funding policy and Arizona Statutes. Users of this report should be aware that contributions made at that rate do not guarantee benefit security. Given the importance of benefit security to any retirement system, we suggest that contributions to the System in excess of those presented in this report be considered.

The funding percentages and unfunded accrued liability as measured based on the actuarial value of assets will differ from similar measures based on the market value of assets. These measures, as provided, are appropriate for determining the adequacy of future contributions, but may not be appropriate for the purpose of settling a portion or all of the Plan's liabilities.

In conducting the valuation, we have relied on personnel, plan design, and asset information supplied by PSPRS through June 30, 2020 and the actuarial assumptions and methods described in the Actuarial Assumptions section of this report. While we cannot verify the accuracy of all this information, the supplied information was reviewed for consistency and reasonableness. As a result of this review, we have no reason to doubt the substantial accuracy of the information and believe that it has produced appropriate results. This information, along with any adjustments or modifications, is summarized in various sections of this report.

This valuation assumes the continuing ability of the participating employers to make the contributions necessary to fund this plan. A determination regarding whether or not the participating employers are actually able to do so is outside our scope of expertise. Consequently, we did not perform such an analysis.


The undersigned are familiar with the immediate and long-term aspects of pension valuations and meet the Qualification Standards of the American Academy of Actuaries necessary to render the actuarial opinions contained herein. All sections of this report are considered an integral part of the actuarial opinions.

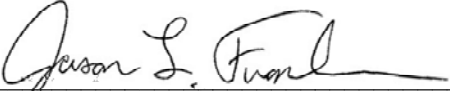
To our knowledge, no associate of Foster & Foster, Inc. working on valuations of the program has any direct financial interest or indirect material interest in the Arizona Public Safety Personnel Retirement System, nor does anyone at Foster & Foster, Inc. act as a member of the Board of Trustees of the Arizona Public Safety Personnel Retirement System. Thus, there is no relationship existing that might affect our capacity to prepare and certify this actuarial report.

If there are any questions, concerns, or comments about any of the items contained in this report, please contact us at 239-433-5500.

Respectfully Submitted,

Foster & Foster, Inc.

By: 
Bradley R. Heinrichs, FSA, EA, MAAA

By: 
Jason L. Franken, FSA, EA, MAAA


By: 
Paul M. Baugher, FSA, EA, MAAA

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I. SUMMARY OF REPORT

The regular annual actuarial valuation of the Arizona Public Safety Personnel Retirement System for the NAU Campus Police, performed as of June 30, 2020, has been completed and the results are presented in this Report. The purpose of this valuation is to:

- Compute the liabilities associated with benefits likely to be paid on behalf of current retired and active members. This information is contained in the section entitled “Liability Support.”
- Compare accumulated assets with the liabilities to assess the funded condition. This information is contained in the section entitled “Liability Support.”
- Compute the employers’ recommended contribution rates for the Fiscal Year beginning July 1, 2021. This information is contained in the section entitled “Contribution Results.”

1. Key Valuation Results

The funded status as of June 30, 2020 and the employer contribution amounts applicable to the plan/fiscal year ending June 30, 2022 are as follows:

	Tier 1 & Tier 2 Members			Tier 3 Members *		
	Pension	Health	Total	Pension	Health	Total
Employer Contribution Rate	48.62%	0.06%	48.68%	9.05%	0.13%	9.18%
Funded Status	41.2%	125.3%	42.7%	101.4%	203.9%	103.0%

2. Comparison of Key Results to Prior Year

The chart below compares the results from this valuation with the results of the prior year’s valuation (as of June 30, 2019):

Contribution Rate

Valuation Date	Tier 1 & Tier 2 Members			Tier 3 Members *		
	Pension	Health	Total	Pension	Health	Total
June 30, 2019	53.36%	0.24%	53.60%	9.21%	0.14%	9.35%
June 30, 2020	48.62%	0.06%	48.68%	9.05%	0.13%	9.18%

Funded Status

Valuation Date	Tier 1 & Tier 2 Members			Tier 3 Members		
	Pension	Health	Total	Pension	Health	Total
June 30, 2019	38.8%	116.3%	40.3%	116.9%	205.3%	118.4%
June 30, 2020	41.2%	125.3%	42.7%	101.4%	203.9%	103.0%

* The Tier 3 rates shown are the calculated rates as of the valuation date and do not reflect any Legacy costs that the employer must also contribute.

3. Reasons for Change

Changes in the results from the prior year’s valuation can be illustrated in the following tables along with high-level explanations for the entire System below:

Contribution Rate

	Tier 1 & Tier 2		Tier 3 Members	
	Pension	Health	Pension	Health
Contribution Rate Last Valuation	53.36%	0.24%	9.21%	0.14%
Asset Experience	0.56%	0.03%	0.02%	0.00%
Payroll Base	(6.00%)	0.03%	0.02%	(0.02%)
Liability Experience	(1.57%)	(0.16%)	(0.15%)	0.00%
Assumption/Method Change	0.97%	(0.05%)	0.00%	0.00%
Other	<u>1.30%</u>	<u>(0.03%)</u>	<u>(0.05%)</u>	<u>0.01%</u>
Contribution Rate This Valuation	48.62%	0.06%	9.05%	0.13%

Funded Status

	Tier 1 & Tier 2		Tier 3 Members	
	Pension	Health	Pension	Health
Funded Status Last Valuation	38.8%	116.3%	116.9%	205.3%
Asset Experience	(0.7%)	(2.5%)	(0.6%)	(1.2%)
Liability Experience	0.8%	14.0%	4.1%	5.4%
Assumption/Method Change	0.0%	0.0%	0.0%	0.0%
Other	<u>2.3%</u>	<u>(2.5%)</u>	<u>(19.0%)</u>	<u>(5.6%)</u>
Funded Status This Valuation	41.2%	125.3%	101.4%	203.9%

Assets Experience – Asset gains and losses (relative to the assumed earnings rate) are smoothed over seven years for Tiers 1 and 2 and over five years for Tier 3. The return on the market value of assets for the year ending June 30, 2020 was 1.2% for Tiers 1 and 2 and 1.7% for Tier 3. On a smoothed, actuarial value of assets basis, however, the average return was 5.4% for Tiers 1 and 2 and 6.1% for Tier 3. This fell short of the 2019 assumed earnings rate for Tiers 1 and 2 of 7.3% and for Tier 3 of 7.0%.

Liability Experience – Experience overall was unfavorable, driven by less than expected inactive mortality and turnover.

Payroll Base – Under the current amortization policy for Tiers 1 and 2, the contribution rate is developed as a level percentage of payroll. The payroll is expected to increase each year in line with the growth assumption (currently 3.50%). To the extent that actual payroll is lower/greater than expected, the contribution rate will increase/decrease as a result.

Assumption / Method Change – The amortization method for Tiers 1 and 2 was updated to use a layered approach. New bases will be amortized on a Level Dollar basis while the 2019 base will continue to be amortized on a Level Percentage of Payroll basis.

Other – This is the combination of all other factors that could impact liabilities year-over-year, with the primary sources being changes resulting from an updated understanding of some data components provided by staff and changes in member data. Note that Tier 3 experience will stabilize as the group matures.

4. Looking Ahead

The continuing effect of prior asset losses was dampened by the asset smoothing reflected in the actuarial value of assets. There remain unrecognized investment losses that will, in the absence of other gains, put upward pressure on the contribution rate next year.

If the June 30, 2020 pension valuation results were based on the market value of assets instead of the actuarial value of assets, the pension funded percentage for Tiers 1 and 2 would be 38.3% (instead of 41.2%) and the pension employer contribution requirement would be 50.89% of payroll (instead of 48.62%).

5. Conclusion

The funded status for Tiers 1 and 2 will continue to improve if assumptions are met and contributions at least equal to the rates determined for each employer are made to the fund. The recent adoption of a layered amortization approach along with a plan to systematically lower the payroll growth assumption was an excellent step to improve funding and ensure the Plan is on a viable path.

The funded status for Tier 3 will stabilize as the population continues to grow, as contributions appear sufficient to keep the liabilities fully funded.

II. CONTRIBUTION RESULTS

Contribution Requirements

Development of Employer Contributions - Tiers 1 & 2 Members				
Valuation Date	June 30, 2020		June 30, 2019	
Applicable to Fiscal Year Ending	2022		2021	
	Rate	Dollar	Rate	Dollar
Pension				
Normal Cost				
Total Normal Cost	17.64%	\$ 190,725	18.08%	\$ 169,975
Employee Cost	<u>(7.65%)</u>	<u>(82,713)</u>	<u>(7.65%)</u>	<u>(71,931)</u>
Employer (Net) Normal Cost	9.99%	108,012	10.43%	98,044
Amortization of Unfunded Liability	<u>38.63%</u>	<u>417,671</u>	<u>42.93%</u>	<u>432,409</u>
Total Employer Cost (Pension)	48.62%	525,683	53.36%	530,453
Health				
Normal Cost	0.40%	4,325	0.46%	4,323
Amortization of Unfunded Liability	<u>(0.34%)</u>	<u>(3,676)</u>	<u>(0.22%)</u>	<u>(2,216)</u>
Total Employer Cost (Health)	0.06%	649	0.24%	2,107
Total Employer Cost (Pension + Health)	48.68%	526,332	53.60%	532,560
Total Minimum Contribution Requirement (if applicable)	0.00%		0.00%	
Alternate Contribution Rate (ACR) *	38.63%		42.93%	
Underlying Payroll (as of valuation date)		1,044,647		940,272

* The Alternate Contribution Rate is the sum of the positive amortization rates for Tiers 1 & 2 Pension and Health and is charged when retirees return to active status.

The results above are shown both prior to and after the application of the statutory minimum contribution requirement of 8% of payroll (5% of payroll if the actual employer contribution is less than 5% for the 2006/2007 Fiscal Year) and are based on the current amortization schedule approved by the Board of Trustees for your individual plan (see "Actuarial Assumptions and Methods").

A.R.S. 38-843, subsection I allows for the employer to request a one-time increase in the amortization period up to a maximum of 30 years. The costs below are provided to assist with that decision, where needed. If the current approved amortization period is greater than those below, that request has already been made for this plan and the following is provided to facilitate earlier payoff, if desired.

	Rate	Dollar
Total Pension Employer Cost (25-year amortization)	38.56%	416,896
Total Pension Employer Cost (30-year amortization)	35.67%	385,663

Development of Employer Contributions – Tier 3 Members

Valuation Date	June 30, 2020	June 30, 2019
Applicable to Fiscal Year Ending	2022	2021

Defined Benefit (DB) Retirement Plan

	Rate	Dollar	Rate	Dollar
Pension				
Total Normal Cost	18.10%	\$ 90,258	18.41%	\$ 51,491
Amortization of Unfunded Liability	<u>0.00%</u>	<u>0</u>	<u>0.00%</u>	<u>0</u>
Total Pension Cost	18.10%	90,258	18.41%	51,491
Employee (EE) Pension Cost	9.05%	45,129	9.21%	25,746
Employer (ER) Pension Cost	9.05%	45,129	9.21%	25,746
Health				
Total Normal Cost	0.25%	1,247	0.28%	783
Amortization of Unfunded Liability	<u>0.00%</u>	<u>0</u>	<u>0.00%</u>	<u>0</u>
Total Health Cost	0.25%	1,247	0.28%	783
Employee (EE) Health Cost	0.13%	624	0.14%	392
Employer (ER) Health Cost	0.13%	624	0.14%	392
Total				
Total Calculated Tier 3 Required EE/ER Individual Cost	9.18%	45,753	9.35%	26,138
Board Approved Tier 3 Required EE/ER Individual Cost ¹	9.94%	49,567	9.94%	27,801
ER Legacy Cost of Tiers 1 & 2 Amort of Unfunded Liabilities ²	38.63%	192,634	42.93%	128,624
Total Calculated Tier 3 Required ER Defined Benefit Cost	47.81%	238,387	52.28%	154,762
Total Board Approved Tier 3 Required ER Defined Benefit Cost	48.57%	242,201	52.87%	156,425
Underlying Payroll (as of valuation date)		481,800		279,692

¹ The Board decided to keep Tier 3 rates level (as calculated with the June 30, 2019 valuation) for the fiscal year ending June 30, 2022.

² Pursuant to ARS § 38-843(B), the amortization of positive unfunded liabilities for Tiers 1 & 2 shall be applied to all Tier 3 payroll on a level percent basis. However, while it is statutorily required to present the rates in this manner, these are the minimums where alternate methods for paying down that unfunded liability is at the discretion of each employer. Further, to understand the effects of reform in relation to Tier 3, compare the total rate of Tier 3 before application of those legacy costs.

Development of Employer Contributions – Tier 3 Members

Valuation Date	June 30, 2020	June 30, 2019
Applicable to Fiscal Year Ending	2022	2021

Defined Contribution (DC) Retirement Plan

	Rate	Dollar	Rate	Dollar
Tier 2 & 3 DB / Non-Social Security				
Employee Cost	3.00%		3.00%	
Employer Cost ¹	3.00%		3.00%	
Tier 3 DC Only				
Employee Cost	9.00%	\$ 11,521	9.00%	\$ 15,328
Employee Disability Program Cost	<u>0.88%</u>	<u>1,126</u>	<u>1.41%</u>	<u>2,401</u>
Total Employee Cost	9.88%	12,647	10.41%	17,729
Employer Cost	9.00%	11,521	9.00%	15,328
Employer Disability Program Cost	<u>0.88%</u>	<u>1,126</u>	<u>1.41%</u>	<u>2,401</u>
Total Employer Cost (before Legacy)	9.88%	12,647	10.41%	17,729
ER Legacy Cost of Tiers 1 & 2 Amort of Unfunded Liabilities ²	38.63%	49,449	42.93%	73,116
Total Employer Cost	48.51%	62,096	53.34%	90,845
Underlying Payroll (as of valuation date)		123,677		158,991

¹ Employer rate is 4% for Tier 2 members for a period of time depending on the individual's membership date.

² Pursuant to ARS § 38-843(B), the amortization of positive unfunded liabilities for Tiers 1 & 2 shall be applied to all Tier 3 payroll on a level percent basis. However, while it is statutorily required to present the rates in this manner, these are the minimums where alternate methods for paying down that unfunded liability is at the discretion of each employer. Further, to understand the effects of reform in relation to Tier 3, compare the total rate of Tier 3 before application of those legacy costs.

Contribution Rate Summary

	Tier 1		Tier 2		Tier 3		
Membership Date On or After	7/1/1968	7/20/2011	1/1/2012		7/1/2017		
Participates in Social Security	N/A	N/A	Yes	No	Yes	No	N/A
Available Retirement Plan ¹	DB Only	DB Only	DB Only	Hybrid	DB Only	Hybrid	DC Only
Employee Contribution Rate							
PSPRS DB Rate	7.65%	11.65%	11.65%	11.65%	9.94%	9.94%	
PSPRS DC Rate				3.00%		3.00%	9.00%
PSPDCRP Disability Program Rate							0.88%
Total EE Contribution Rate	7.65%	11.65%	11.65%	14.65%	9.94%	12.94%	9.88%
Employer Contribution Rate							
PSPRS DB Normal Cost	10.39%	10.39%	10.39%	10.39%	9.94%	9.94%	
PSPRS DB Tier 1 & 2 Legacy Cost ²	38.29%	38.29%	38.29%	38.29%	38.63%	38.63%	38.63%
PSPRS DC Rate ³				4.00%		3.00%	9.00%
PSPDCRP Disability Program Rate							0.88%
Total ER Contribution Rate	48.68%	48.68%	48.68%	52.68%	48.57%	51.57%	48.51%

¹ Employers that pay into Social Security on behalf of their members do not participate in the Hybrid Plan.

² Per statute (ARS § 38-843(B)), any positive unfunded liability for Tiers 1 and 2 is to be applied to all Tier 3 (DB and DC) payrolls.

³ The 4.00% employer match for Tier 2 Hybrid members is for a short period of time depending on the membership date of the employee at which point the rate will change to 3.00% (ARS § 38-868(C)).

Exhibit summarizes employee and employer contributions based on Statute and the results of June 30, 2020 actuarial valuation. Pension and health components are combined, where applicable.

Impact of Additional Contributions

	Additional Contribution (000s)										
	\$0	\$100	\$200	\$300	\$400	\$500	\$600	\$700	\$800	\$900	\$1,000
Impact On											
Funded Status 06/30/2020	41.2%	41.9%	42.7%	43.5%	44.2%	45.0%	45.7%	46.5%	47.3%	48.0%	48.8%
FYE 2022 Contribution Rate	48.68%	48.09%	47.50%	46.91%	46.32%	45.73%	45.14%	44.56%	43.97%	43.38%	42.79%

Table shows the hypothetical change in the funded status and contribution rate from the June 30, 2020 actuarial valuation results for Tiers 1 & 2 if an additional contribution of the amount shown had been made to the Fund on June 30, 2020. This illustration can help estimate the impact of contributing additional monies to the fund in the future.

Historical Summary of Employer Rates

	Valuation Date June 30	Fiscal Year Ending June 30	Normal Cost	Pension		Health		Total
				Unfunded Amortization	Total	Normal Cost	Unfunded Amortization	
TIERS 1 & 2	2018	2020	12.06%	53.55%	65.61%	0.32%	0.00%	0.32%
	2019	2021	10.43%	42.93%	53.36%	0.46%	(0.22%)	0.24%
	2020	2022	9.99%	38.63%	48.62%	0.40%	(0.34%)	0.06%
TIER 3 ^{1, 2}	2018	2020	9.68%	0.00%	9.68%	0.26%	0.00%	0.26%
	2019	2021	9.68%	0.00%	9.68%	0.26%	0.00%	0.26%
	2020 ²	2022	9.05%	0.00%	9.05%	0.13%	0.00%	0.13%
	2020	2022	9.68%	0.00%	9.68%	0.26%	0.00%	0.26%

¹ Rates shown are Board approved EE/ER rates, unless otherwise noted. Does not reflect Legacy costs that the employer must also contribute.

² Rates shown are calculated EE/ER rates

III. LIABILITY SUPPORT

Liabilities and Funded Ratios by Benefit - Tiers 1 & 2

	June 30, 2020	June 30, 2019
Pension		
Actuarial Present Value of Benefits		
Retirees and Beneficiaries	\$ 7,937,514	\$ 7,463,719
DROP Members	563,987	1,280,714
Vested Members	72,573	73,104
Active Members	<u>5,901,291</u>	<u>5,376,343</u>
Total Actuarial Present Value of Benefits	14,475,365	14,193,880
Actuarial Accrued Liability (AAL)		
All Inactive Members	8,574,074	8,817,537
Active Members	<u>4,601,922</u>	<u>4,266,092</u>
Total Actuarial Accrued Liability	13,175,996	13,083,629
Actuarial Value of Assets (AVA)	5,426,664	5,072,272
Unfunded Actuarial Accrued Liability		
Gross Unfunded Actuarial Accrued Liability	7,749,332	8,011,357
Stabilization Reserve	<u>0</u>	<u>0</u>
Net Unfunded Actuarial Accrued Liability	7,749,332	8,011,357
Funded Ratio (AVA / AAL)	41.2%	38.8%
Health		
Present Value of Benefits		
Retirees and Beneficiaries	\$ 123,554	\$ 127,468
DROP Members	10,496	18,649
Active Members	<u>136,037</u>	<u>139,760</u>
Total Present Value of Benefits	270,087	285,877
Actuarial Accrued Liability (AAL)		
All Inactive Members	134,050	146,117
Active Members	<u>109,789</u>	<u>113,411</u>
Total Actuarial Accrued Liability	243,839	259,528
Actuarial Value of Assets (AVA)	305,598	301,766
Unfunded Actuarial Accrued Liability	(61,759)	(42,238)
Funded Ratio (AVA / AAL)	125.3%	116.3%

Liabilities and Funded Ratios by Benefit - Tier 3

	June 30, 2020	June 30, 2019
Pension		
Actuarial Present Value of Benefits		
Retirees and Beneficiaries	\$ 429,363	\$ 0
Vested Members	743,741	203,244
Active Members	<u>203,486,437</u>	<u>120,826,663</u>
Total Actuarial Present Value of Benefits	204,659,541	121,029,907
Actuarial Accrued Liability (AAL)		
All Inactive Members	1,173,104	203,244
Active Members	<u>22,066,495</u>	<u>7,753,481</u>
Total Actuarial Accrued Liability	23,239,599	7,956,725
Actuarial Value of Assets (AVA)	23,570,444	9,305,220
Unfunded Actuarial Accrued Liability	(330,845)	(1,348,495)
Funded Ratio (AVA / AAL)	101.4%	116.9%
Health		
Present Value of Benefits		
Retirees and Beneficiaries	0	0
Active Members	<u>2,785,857</u>	<u>1,814,082</u>
Total Present Value of Benefits	2,785,857	1,814,082
Actuarial Accrued Liability (AAL)		
All Inactive Members	0	0
Active Members	<u>353,563</u>	<u>136,597</u>
Total Actuarial Accrued Liability	353,563	136,597
Actuarial Value of Assets (AVA)	721,079	280,404
Unfunded Actuarial Accrued Liability	(367,516)	(143,807)
Funded Ratio (AVA / AAL)	203.9%	205.3%

The liabilities shown on this page are the liabilities for all Tier 3 members grouped together in the Risk Sharing group. These liabilities are NOT the liabilities for Nau Campus Police Tier 3 members.

Derivation of Experience (Gain)/Loss

	Tiers 1 & 2		Tier 3	
	Pension	Health	Pension	Health
(1) Unfunded Actuarial Accrued Liability as of June 30, 2019	8,011,357	(42,238)	(1,348,495)	(143,807)
(2) Normal Cost Developed in Last Valuation	98,044	4,323	4,806,265	73,059
(3) Actual Contributions	993,866	3,290	6,660,557	411,565
(4) Expected Interest On (1), (2), and (3)	556,349	(2,886)	13,589	(19,922)
(5) Expected Unfunded Actuarial Accrued Liability as of June 30, 2020 (1)+(2)-(3)+(4)	7,671,884	(44,091)	(3,189,198)	(502,235)
(6) Changes to UAAL Due to Assumptions, Methods and Benefits	0	0	0	0
(7) Change to UAAL Due to Actuarial (Gain)/Loss	<u>77,448</u>	<u>(17,668)</u>	<u>2,858,353</u>	<u>134,719</u>
(8) Unfunded Actuarial Accrued Liability as of June 30, 2020	7,749,332	(61,759)	(330,845)	(367,516)

Amortization of Unfunded Liabilities - Tiers 1 & 2

	Date Established	Outstanding Balance	Years Remaining	Amortization Rate
Pension	06/30/2019	7,840,939	16	38.41%
	06/30/2020	<u>35,415</u>	16	<u>0.22%</u>
	Total	7,876,354		38.63%
Health	06/30/2019	0	19	0.00%
	06/30/2020	<u>(61,759)</u>	20	<u>(0.34%)</u>
	Total	(61,759)		(0.34%)

Amortization of Unfunded Liabilities - Tier 3

	Date Established	Outstanding Balance	Years Remaining	Amortization Rate *
Pension	06/30/2018	166,947	8	0.03%
	06/30/2019	(1,419,864)	9	(0.24%)
	06/30/2020	<u>922,072</u>	10	<u>0.15%</u>
	Total	(330,845)		0.00%
Health	06/30/2018	(3,540)	8	0.00%
	06/30/2019	(129,816)	9	(0.02%)
	06/30/2020	<u>(234,160)</u>	10	<u>(0.04%)</u>
	Total	(367,516)		0.00%

* By Statute, negative amortization rates are not subtracted in Tier 3 rate calculations.

IV. ASSET SUPPORT

Statement of Changes in Fiduciary Net Position for Year Ended June 30, 2020 Market Value Basis

	Tiers 1 & 2		Tier 3	
	Pension	Health	Pension	Health
Additions				
Contributions				
Member Contributions	\$ 128,443,154	\$ 0	\$ 14,386,911	\$ 0
Employer Contributions	938,799,348	0	14,392,453	0
Health Insurance Contributions	<u>0</u>	<u>4,741,938</u>	<u>0</u>	<u>909,053</u>
Total Contributions	1,067,242,502	4,741,938	28,779,364	909,053
Investment Income				
Net Increase in Fair Value	58,711,963	1,945,052	350,525	8,778
Interest and Dividends	66,905,282	2,216,486	399,442	10,003
Other Income	26,056,951	1,568,972	155,567	7,081
Less Investment Expenses	<u>(49,802,841)</u>	<u>(1,555,022)</u>	<u>(297,336)</u>	<u>(7,018)</u>
Net Investment Income	101,871,355	4,175,488	608,198	18,844
Transfers In	379,476	0	155,830	0
Total Additions	1,169,493,333	8,917,426	29,543,392	927,897
Deductions				
Distributions to Members				
Benefit Payments	900,036,400	0	0	0
Health Insurance Subsidy	0	17,050,706	0	0
Refund of Contributions	<u>14,184,072</u>	<u>0</u>	<u>157,299</u>	<u>0</u>
Total Distributions	914,220,472	17,050,706	157,299	0
Administrative Expenses	8,356,791	339,564	49,892	1,532
Transfers Out	367,881	0	0	0
Other	0	0	0	0
Total Deductions	922,945,144	17,390,270	207,191	1,532
Net Increase / (Decrease)	246,548,189	(8,472,844)	29,336,201	926,365
Net Position Held in Trust				
Prior Valuation	7,810,990,750	336,551,716	18,922,750	554,433
Beginning of the Year Adjustment	(163)	163	163	(163)
End of the Year	8,057,538,776	328,079,035	48,259,114	1,480,635

Development of Pension Actuarial Value of Assets - Tiers 1 & 2

A. Investment Income	
A1. Actual Investment Income	\$ 93,514,564
A2. Expected Amount for Immediate Recognition	575,689,672
A3. Amount Subject to Amortization	(482,175,108)

B. Amortization Schedule	Year Ended June 30						
	2020	2021	2022	2023	2024	2025	2026
2020 Experience (A3 / 7)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,160)
2019 Experience	(22,859,275)	(22,859,275)	(22,859,275)	(22,859,275)	(22,859,275)	(22,859,275)	
2018 Experience	(6,266,349)	(6,266,349)	(6,266,349)	(6,266,349)	(6,266,351)		
2017 Experience	33,380,149	33,380,149	33,380,149	33,380,148			
2016 Experience	(64,250,729)	(64,250,729)	(64,250,726)				
2015 Experience	(36,894,248)	(36,894,251)					
2014 Experience	33,458,496						
Total Amortization	(132,314,114)	(165,772,613)	(128,878,359)	(64,627,634)	(98,007,784)	(91,741,433)	(68,882,160)

C. Actuarial Value of Assets	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	8,079,039,739	
C2. Noninvestment Net Cash Flow	153,033,625	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	8,675,448,922	
C4. Market Value of Assets, 06/30/2020	8,057,538,776	5,040,149
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	8,675,448,922	5,426,664

D. Rates of Return	
D1. Market Value Rate of Return	1.2%
D2. Actuarial Value Rate of Return	5.4%

Development of Health Actuarial Value of Assets - Tiers 1 & 2

A. Investment Income

A1. Actual Investment Income	\$ 3,835,924
A2. Expected Amount for Immediate Recognition	24,126,918
A3. Amount Subject to Amortization	(20,290,994)

B. Amortization Schedule	Year Ended June 30						
	2020	2021	2022	2023	2024	2025	2026
2020 Experience (A3 / 7)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,716)
2019 Experience	(1,075,569)	(1,075,569)	(1,075,569)	(1,075,569)	(1,075,569)	(1,075,572)	
2018 Experience	(304,653)	(304,653)	(304,653)	(304,653)	(304,656)		
2017 Experience	1,532,136	1,532,136	1,532,136	1,532,136			
2016 Experience	(3,221,043)	(3,221,043)	(3,221,044)				
2015 Experience	(1,796,589)	(1,796,586)					
2014 Experience	1,653,381						
Total Amortization	(6,111,050)	(7,764,428)	(5,967,843)	(2,746,799)	(4,278,938)	(3,974,285)	(2,898,716)

C. Actuarial Value of Assets	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	350,002,781	
C2. Noninvestment Net Cash Flow	(12,308,768)	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	355,709,881	
C4. Market Value of Assets, 06/30/2020	328,079,035	281,860
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	355,709,881	305,598

D. Rates of Return

D1. Market Value Rate of Return	1.2%
D2. Actuarial Value Rate of Return	5.2%

Development of Pension Actuarial Value of Assets - Tiers 3

A. Investment Income

A1. Actual Investment Income	\$ 558,306
A2. Expected Amount for Immediate Recognition	2,314,784
A3. Amount Subject to Amortization	(1,756,478)

B. Amortization Schedule	Year Ended June 30				
	2020	2021	2022	2023	2024
2020 Experience (A3 / 5)	(351,296)	(351,296)	(351,296)	(351,296)	(351,294)
2019 Experience	44,435	44,435	44,435	44,437	
2018 Experience	(370)	(370)	(371)		
2017 Experience	0	0			
2016 Experience	0				
Total Amortization	(307,231)	(307,231)	(307,232)	(306,859)	(351,294)

C. Actuarial Value of Assets	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	18,746,119	
C2. Noninvestment Net Cash Flow	28,777,895	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	49,531,567	
C4. Market Value of Assets, 06/30/2020	48,259,114	22,964,925
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	49,531,567	23,570,443

D. Rates of Return

D1. Market Value Rate of Return	1.7%
D2. Actuarial Value Rate of Return	6.1%

Development of Health Actuarial Value of Assets - Tiers 3

A. Investment Income

A1. Actual Investment Income	\$ 17,312
A2. Expected Amount for Immediate Recognition	70,089
A3. Amount Subject to Amortization	(52,777)

B. Amortization Schedule	Year Ended June 30				
	2020	2021	2022	2023	2024
2020 Experience (A3 / 5)	(10,555)	(10,555)	(10,555)	(10,555)	(10,557)
2019 Experience	1,507	1,507	1,507	1,508	
2018 Experience	0	0	(2)		
2017 Experience	0	0			
2016 Experience	0				
Total Amortization	(9,048)	(9,048)	(9,050)	(9,047)	(10,557)

C. Actuarial Value of Assets	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	548,406	
C2. Noninvestment Net Cash Flow	909,053	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	1,518,500	
C4. Market Value of Assets, 06/30/2020	1,480,635	703,098
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	1,518,500	721,078

D. Rates of Return

D1. Market Value Rate of Return	1.7%
D2. Actuarial Value Rate of Return	6.1%

V. MEMBER STATISTICS

Valuation Data Summary

	June 30, 2020		June 30, 2019	
	Tiers 1 & 2	Tier 3	Tiers 1 & 2	Tier 3
Actives				
Number	12	8	13	5
Average Current Age	38.1	26.3	39.0	25.6
Average Age at Employment	24.5	25.0	25.9	24.7
Average Past Service	13.6	1.3	13.1	0.9
Average Annual Salary	\$76,856	\$56,545	\$72,328	\$55,938
Actives (transferred)				
Number	1	0	0	0
Average Current Age	27.1	N/A	N/A	N/A
Average Age at Employment	22.4	N/A	N/A	N/A
Average Past Service	4.7	N/A	N/A	N/A
Average Annual Salary	\$78,007	N/A	N/A	N/A
Retirees				
Number	12	0	12	0
Average Current Age	68.4	N/A	68.1	N/A
Average Annual Benefit	\$52,849	N/A	\$50,159	N/A
Drop Retirees				
Number	1	N/A	1	N/A
Average Current Age	63.0	N/A	57.9	N/A
Average Annual Benefit	\$42,140	N/A	\$65,829	N/A
Beneficiaries				
Number	1	0	1	0
Average Current Age	71.1	N/A	70.1	N/A
Average Annual Benefit	\$42,455	N/A	\$41,623	N/A
Disability Retirees				
Number	0	0	0	0
Average Current Age	N/A	N/A	N/A	N/A
Average Annual Benefit	N/A	N/A	N/A	N/A
Inactive / Vested				
Number	2	0	2	1
Average Current Age	31.9	N/A	30.9	24.3
Average Accumulated Contributions	\$27,845	N/A	\$27,845	\$2,088
Total Number	29	8	29	6
Former Members (transferred)	1	1	2	0

Counts and Pay Summary by Service - Tiers 1 & 2

Age	Past Service							Total Count	Total Pay	Average Pay
	0-4	5-9	10-14	15-19	20-24	25-29	30+			
<20	0	0	0	0	0	0	0	0	0	0
20 - 24	0	0	0	0	0	0	0	0	0	0
25 - 29	3	0	0	0	0	0	0	3	209,252	69,751
30 - 34	1	1	0	0	0	0	0	2	135,429	67,715
35 - 39	0	0	2	0	0	0	0	2	152,397	76,199
40 - 44	0	0	1	2	0	0	0	3	211,082	70,361
45 - 49	0	0	0	1	2	0	0	3	292,121	97,374
50 - 54	0	0	0	0	0	0	0	0	0	0
55 - 59	0	0	0	0	0	0	0	0	0	0
60 - 64	0	0	0	0	0	0	0	0	0	0
65+	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Total	4	1	3	3	2	0	0	13	1,000,281	76,945

Counts and Pay Summary by Service - Tier 3

Age	Past Service							Total Count	Total Pay	Average Pay
	0-4	5-9	10-14	15-19	20-24	25-29	30+			
15 - 19	0	0	0	0	0	0	0	0	0	0
20 - 24	2	0	0	0	0	0	0	2	117,640	58,820
25 - 29	5	0	0	0	0	0	0	5	276,191	55,238
30 - 34	1	0	0	0	0	0	0	1	58,532	58,532
35 - 39	0	0	0	0	0	0	0	0	0	0
40 - 44	0	0	0	0	0	0	0	0	0	0
45 - 49	0	0	0	0	0	0	0	0	0	0
50 - 54	0	0	0	0	0	0	0	0	0	0
55 - 59	0	0	0	0	0	0	0	0	0	0
60 - 64	0	0	0	0	0	0	0	0	0	0
65+	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Total	8	0	0	0	0	0	0	8	452,363	56,545

VI. ACTUARIAL ASSUMPTIONS AND METHODS

Interest Rate

This is the assumed earnings rate on System assets, compounded annually, net of investment and administrative expenses.

Tiers 1 & 2:

7.30% per year.

Tier 3:

7.00% per year.

Salary Increases

See table below. This is an annual increase for individual member’s salary. These rates, which are based on a 2017 experience study using actual plan experience, consist of 3.5% for wage inflation with the remaining portion for merit / seniority increases.

	Maricopa	Pima		Maricopa	Pima	
	County	County	Other	County	County	Other
Age	Police	Police	Police	Fire	Fire	Fire
20	7.50%	7.50%	7.50%	7.50%	7.50%	7.20%
25	7.14%	6.24%	6.60%	7.35%	6.36%	6.60%
30	6.00%	5.16%	5.25%	6.74%	5.48%	5.60%
35	4.77%	4.55%	4.15%	5.56%	4.83%	4.96%
40	3.90%	3.89%	3.60%	4.46%	4.03%	4.44%
45	3.54%	3.56%	3.50%	3.74%	3.60%	3.78%
50+	3.50%	3.50%	3.50%	3.50%	3.50%	3.50%

Inflation

2.50%.

Tier 3 Compensation Limit

\$110,000 for calendar 2020. Assumed increases of 2.00% per year thereafter.

Cost-of-Living Adjustment

1.75%.

Mortality Rates

These rates are used to project future decrements from the population due to death.

Active Lives:

PubS-2010 Employee mortality, loaded 110% for males and females, projected with future mortality improvements reflected generationally using 75% of scale MP-2019. 100% of active deaths are assumed to be in the line of duty.

Inactive Lives

PubS-2010 Healthy Retiree mortality, loaded 110% for males and females, projected with future mortality improvements reflected

generationally using 75% of scale MP-2019.

Beneficiaries:

PubS-2010 Survivor mortality, projected with future mortality improvements reflected generationally using 75% of scale MP-2019.

Disabled Lives:

PubS-2010 Disabled mortality, projected with future mortality improvements reflected generationally using 75% of scale MP-2019.

The mortality assumptions sufficiently accommodate anticipated future mortality improvements.

Retirement / DROP Rates

These rates are used to project future decrements from the active population due to retirement. The rates below are based on a 2017 experience study using actual plan experience.

Tier 1 – reaching age 62 before attaining 20 years of service:

Age-related rates based on age at retirement: 60% assumed at age 62, 50% assumed at ages 63 – 69, and 100% assumed at age 70. Rates are the same for all employers.

Tier 1 – reaching age 62 after attaining 20 years of service:

Service-related rates based on service at retirement:

	Maricopa County	Pima County	Other	Maricopa County	Pima County	Other
<u>Service</u>	<u>Police</u>	<u>Police</u>	<u>Police</u>	<u>Fire</u>	<u>Fire</u>	<u>Fire</u>
20	27%	24%	35%	14%	18%	23%
21	18%	19%	30%	14%	18%	18%
22	14%	14%	23%	7%	11%	11%
23	10%	10%	10%	7%	7%	8%
24	8%	7%	10%	7%	7%	5%
25	38%	32%	36%	22%	22%	30%
26	36%	32%	30%	26%	26%	30%
27	29%	22%	30%	19%	19%	30%
28	29%	22%	30%	32%	25%	25%
29	29%	22%	30%	30%	25%	16%
30	34%	35%	30%	30%	30%	32%
31	34%	35%	30%	30%	30%	35%
32	65%	65%	70%	55%	55%	60%
33	65%	65%	70%	55%	55%	60%
34+	100%	100%	100%	100%	100%	100%

60% are assumed to enter the DROP program while the remaining 40% are assumed to retire and commence benefits immediately.

Tiers 2 & 3:

Age-related rates based on age at retirement:

<u>Age</u>	Maricopa	Pima	Other	Maricopa	Pima	Other
	County	County		County	County	
	<u>Police</u>	<u>Police</u>	<u>Police</u>	<u>Fire</u>	<u>Fire</u>	<u>Fire</u>
53	38%	32%	36%	22%	22%	30%
54	36%	32%	30%	26%	26%	30%
55	29%	22%	30%	19%	19%	30%
56	29%	22%	30%	32%	25%	25%
57	29%	22%	30%	30%	25%	16%
58	34%	35%	30%	30%	30%	32%
59	34%	35%	30%	30%	30%	35%
60-63	65%	65%	70%	55%	55%	60%
64+	100%	100%	100%	100%	100%	100%

Termination Rate

These rates are used to project future decrements from the active population due to termination. Service-related rates based on service at termination are shown below. The rates below apply to members prior to retirement eligibility and are based on a 2017 experience study using actual plan experience.

<u>Service</u>	Maricopa	Pima	Other	Maricopa	Pima	Other
	County	County		County	County	
	<u>Police</u>	<u>Police</u>	<u>Police</u>	<u>Fire</u>	<u>Fire</u>	<u>Fire</u>
1	14.00%	16.00%	16.00%	7.00%	10.00%	9.50%
2	8.50%	9.00%	12.50%	4.50%	5.00%	9.00%
3	6.50%	7.50%	11.50%	3.70%	5.00%	7.50%
4	4.50%	6.00%	9.00%	3.00%	4.00%	7.50%
5	3.60%	6.00%	8.00%	2.50%	4.00%	6.50%
6	3.30%	4.50%	8.00%	1.70%	3.50%	4.50%
7	3.30%	4.50%	7.00%	1.70%	3.00%	4.00%
8	3.30%	3.20%	7.00%	1.70%	2.40%	3.50%
9	2.70%	3.20%	6.50%	1.70%	2.40%	3.50%
10	2.70%	3.20%	6.00%	1.50%	2.40%	3.00%
11	2.70%	3.20%	5.00%	1.10%	2.40%	2.70%
12	1.80%	1.40%	4.00%	0.70%	1.00%	2.00%
13	1.30%	1.40%	3.50%	0.70%	1.00%	2.00%
14	1.30%	1.40%	3.00%	0.70%	1.00%	1.70%
15	1.30%	1.00%	3.00%	0.60%	1.00%	1.20%
16	0.70%	1.00%	2.00%	0.50%	1.00%	1.20%
17	0.70%	1.00%	1.75%	0.50%	0.50%	1.20%
18	0.70%	1.00%	1.75%	0.40%	0.50%	1.20%
19	0.50%	1.00%	1.75%	0.40%	0.50%	1.20%
20+	0.50%	1.00%	1.75%	0.40%	0.50%	0.50%

Disability Rate

These rates are used to project future decrements from the active population due to disability. Sample age-related rates based on age at disability are provided below. These rates are based on a 2017 experience study using actual plan experience. 100% of disablements are assumed to be duty-related.

	Maricopa	Pima		Maricopa	Pima	
	County	County	Other	County	County	Other
Age	Police	Police	Police	Fire	Fire	Fire
20	0.08%	0.08%	0.10%	0.03%	0.03%	0.03%
25	0.08%	0.08%	0.10%	0.03%	0.03%	0.03%
30	0.17%	0.16%	0.20%	0.04%	0.03%	0.03%
35	0.22%	0.21%	0.26%	0.09%	0.07%	0.08%
40	0.36%	0.35%	0.44%	0.17%	0.16%	0.17%
45	0.51%	0.49%	0.62%	0.17%	0.43%	0.48%
50	0.78%	0.75%	0.95%	0.43%	0.59%	0.65%
55	1.02%	0.98%	1.23%	1.00%	1.01%	1.13%

Marital Status

For active members, 85% of males and 60% of females are assumed to be married. Actual marital status is used, where applicable, for inactive members.

Spouse’s Age

Males are assumed to be three years older than females.

Health Care Utilization

For active members, 70% of retirees are expected to utilize retiree health care. Actual utilization is used for inactive members.

Funding Method

Entry Age Normal Cost Method.

Actuarial Asset Method

Method described below. Note that during periods when investment performance exceeds (falls short) of the assumed rate, the actuarial value of assets will tend to be less (greater) than the market value of assets.

Tiers 1 & 2:

Each year the assumed investment income is recognized in full while the difference between actual and assumed investment income are smoothed over a 7-year period subject to a 20% corridor around the market value.

Tier 3:

Each year the assumed investment income is recognized in full while the difference between actual and assumed investment income are smoothed over a 5-year period subject to a 20% corridor around the market value.

Funding Policy Amortization Method

Tiers 1 & 2:

Any positive UAAL (assets less than liabilities) is amortized using a layered approach beginning with the June 30, 2020 valuation, with new amounts determined according to a Level Dollar method over a closed period of 15 years (phased into from current period of at most 30 years). Initial layer from June 30, 2019 valuation continues to be amortized according to a Level Percentage of Payroll method. Any negative UAAL (assets greater than liabilities) is amortized according to a Level Dollar method over an open period of 20 years.

Tier 3:

Any positive UAAL (assets less than liabilities) is amortized according to a Level Dollar method over a closed period of 10 years. No amortization is made of any negative UAAL (assets greater than liabilities).

Payroll Growth

3.50% per year. This is annual increase for total employer payroll.

Stabilization Reserve

Beginning with the June 30, 2007 valuation and with each subsequent valuation, if the actuarial value of assets exceeds the actuarial accrued liability, one half of this excess in each year is allocated to a Stabilization Reserve. This Reserve is excluded from the calculation of the employer contribution rates. The Reserve accumulates as long as the plan is overfunded. Once the plan becomes underfunded, the Stabilization Reserve will be used to dampen increases in the employer contribution rates.

Changes to Actuarial Assumptions and Methods Since the Prior Valuation

The amortization method was changed for Tiers 1 and 2 to use a layered amortization approach.

VII. DISCUSSION OF RISK

ASOP No. 51, Assessment and Disclosure of Risk Associated with Measuring Pension Obligations and Determining Pension Plan Contributions, states that the actuary should identify risks that, in the actuary's professional judgment, may reasonably be anticipated to significantly affect the plan's future financial condition.

Throughout this report, actuarial results are determined under various assumption scenarios. These results are based on the premise that all future plan experience will align with the plan's actuarial assumptions; however, there is no guarantee that actual plan experience will align with the plan's assumptions. Whenever possible, the recommended assumptions in this report reflect conservatism to allow for some margin of unfavorable future plan experience. However, it is still possible that actual plan experience will differ from anticipated experience in an unfavorable manner that will negatively impact the plan's funded position.

Below are examples of ways in which plan experience can deviate from assumptions and the potential impact of that deviation. Typically, this results in an actuarial gain or loss representing the current-year financial impact on the plan's unfunded liability of the experience differing from assumptions; this gain or loss is amortized over a period of time determined by the plan's amortization method. When assumptions are selected that adequately reflect plan experience, gains and losses typically offset one another in the long term, resulting in a relatively low impact on the plan's contribution requirements associated with plan experience. When assumptions are too optimistic, losses can accumulate over time and the plan's amortization payment could potentially grow to an unmanageable level.

- **Investment Return:** When the rate of return on the Actuarial Value of Assets falls short of the assumption, this produces a loss representing assumed investment earnings that were not realized. Further, it is unlikely that the plan will experience a scenario that matches the assumed return in each year as capital markets can be volatile from year to year. Therefore, contribution amounts can vary in the future.
- **Salary Increases:** When a plan participant experiences a salary increase that was greater than assumed, this produces a loss representing the cost of an increase in anticipated plan benefits for the participant as compared to the previous year. The total gain or loss associated with salary increases for the plan is the sum of salary gains and losses for all active participants.
- **Payroll Growth:** The plan's payroll growth assumption, if one is used, causes a predictable annual increase in the plan's amortization payment in order to produce an amortization payment that remains constant as a percentage of payroll if all assumptions are realized. If payroll does not increase according to the plan's payroll growth assumption, the plan's amortization payment can increase significantly as a percentage of payroll even if all assumptions other than the payroll growth assumption are realized.
- **Demographic Assumptions:** Actuarial results take into account various potential events that could happen to a plan participant, such as retirement, termination, disability, and death. Each of these potential events is assigned a liability based on the likelihood of the event and the financial consequence of the event for the plan. Accordingly, actuarial liabilities reflect a blend of financial consequences associated with various possible outcomes (such as retirement at one of various possible ages). Once the outcome is known (e.g. the participant retires) the liability is adjusted to reflect the known outcome. This adjustment

produces a gain or loss depending on whether the outcome was more or less favorable than other outcomes that could have occurred.

- **Contribution risk:** This risk results from the potential that actual employer contributions may deviate from actuarially determined contributions, which are determined in accordance with the Board’s funding policy. The funding policy is intended to result in contribution requirements that if paid when due, will result in a reasonable expectation that assets will accumulate to be sufficient to pay plan benefits when due. Contribution deficits, particularly large deficits and those that occur repeatedly, increase future contribution requirements and put the plan at risk for not being able to pay plan benefits when due.

Impact of Plan Maturity on Risk

For newer pension plans, most of the participants and associated liabilities are related to active members who have not yet reached retirement age. As pension plans continue in operation and active members reach retirement ages, liabilities begin to shift from being primarily related to active members to being shared amongst active and retired members. Plan maturity is a measure of the extent to which this shift has occurred. It is important to understand that plan maturity can have an impact on risk tolerance and the overall risk characteristics of the plan. For example, plans with a large amount of retired liability do not have as long of a time horizon to recover from losses (such as losses on investments due to lower than expected investment returns) as plans where the majority of the liability is attributable to active members. For this reason, less tolerance for investment risk may be warranted for highly mature plans with a substantial inactive liability. Similarly, mature plans paying substantial retirement benefits resulting in a small positive or net negative cash flow can be more sensitive to near term investment volatility, particularly if the size of the fund is shrinking, which can result in less assets being available for investment in the market.

To assist with determining the maturity of the plan, we have provided some relevant metrics in the table following titled “Plan Maturity Measures and Other Risk Metrics.” For a better understanding of the overall Plan and the impact of these risks, please refer to the consolidated PSPRS valuation report.

Plan Maturity Measures and Other Risk Metrics

	Tiers 1 & 2			Tier 3 ¹		
	06/30/2018	06/30/2019	06/30/2020	06/30/2018	06/30/2019	06/30/2020
Support Ratio						
Total Actives	14	13	13	419	944	1,408
Total Inactives	18	16	16	23	57	130
Actives / Inactives	77.8%	81.3%	81.3%	1,821.7%	1,656.1%	1,083.1%
Asset Volatility Ratio						
Market Value of Assets (MVA)		4,903,983	5,040,149		9,392,896	22,964,925
Total Annual Payroll		940,272	1,000,281		50,420,565	84,448,996
MVA / Total Annual Payroll		521.5%	503.9%		18.6%	27.2%
Accrued Liability (AL) Ratio						
Inactive Accrued Liability	8,712,123	8,817,537	8,574,074		203,244	1,173,104
Total Accrued Liability	12,516,171	13,083,629	13,175,996		7,956,725	23,239,599
Inactive AL / Total AL	69.6%	67.4%	65.1%		2.6%	5.0%
Funded Ratio						
Actuarial Value of Assets (AVA)	4,511,291	5,072,272	5,426,664	1,635,349	9,305,220	23,570,444
Total Accrued Liability	12,516,171	13,083,629	13,175,996	1,831,715	7,956,725	23,239,599
AVA / Total Accrued Liability	36.0%	38.8%	41.2%	89.3%	116.9%	101.4%
Net Cash Flow Ratio						
Net Cash Flow ²		266,666	75,798		7,281,178	13,192,598
Market Value of Assets (MVA)		4,903,983	5,040,149		9,392,896	22,964,925
Net Cash Flow / MVA		5.4%	1.5%		77.5%	57.4%

¹ Tier 3 results are shown for the Risk Sharing group, where applicable.

² Determined as total contributions minus benefit payments. Administrative expenses are typically included but are considered part of the net interest rate assumption for this plan.

VIII. SUMMARY OF CURRENT PLAN

The following is a summary of the benefit provisions provided in Title 38, Chapter 5, Article 4 of the Arizona Revised Statutes.

Membership Full-time employees of an eligible group, prior to attaining age 65, who are engaged to work for more than six months in a calendar year.

Benefit Tiers Benefits differ for members based on their hire date:

<u>Tier</u>	<u>Hire Date</u>
1	Hired before January 1, 2012
2	Hired on or after January 1, 2012 but before July 1, 2017
3	Hired on or after July 1, 2017

Compensation Compensation is the amount including base salary, overtime pay, shift and military differential pay, compensatory time used in lieu of overtime pay, and holiday pay, paid to an employee on a regular payroll basis and longevity pay paid at least every six months for which contributions are made to the System. For Tier 3 members, compensation is limited by statutory cap (\$110,000 with adjustments by the Board).

Average Monthly Benefit Compensation **Tier 1:**
The highest compensation paid to member during three consecutive years out of the last 20 years of Credited Service, divided by months.

Tier 2:
The highest compensation paid to member during five consecutive years out of the last 20 years of Credited Service, divided by months.

Tier 3:
The highest compensation paid to member during five consecutive years out of the last 15 years of Credited Service, divided by months.

Credited Service Total periods of service, both before and after the member's date of participation, for which the member made contributions to the fund.

Normal Retirement Date **Tier 1:**
First day of month following attainment of 1) 20 years of service or 2) 62nd birthday and completion of 15 years of service.

Tier 2:

First day of month following the attainment of age 52.5 and completion of 15 years of service.

Tier 3:

First day of month following the attainment of age 55 and completion of 15 years of service.

Benefit

Tier 1:

50% of Average Monthly Benefit Compensation, adjusted based on Credited Service as follows (maximum benefit of 80% of Average Monthly Benefit Compensation):

<u>Credited Service</u>	<u>Benefit Adjustment</u>
15 years, but less than 20	Reduced 4% per year less than 20
20 years, but less than 25	Plus 2% per year between 20 and 25
25+ years	Plus 2.5% per year above 20

Tier 2:

Benefit multiplier (below) times Average Monthly Benefit Compensation times Credited Service (maximum benefit of 80% of Average Monthly Benefit Compensation):

<u>Credited Service</u>	<u>Benefit Multiplier</u>
15 years, but less than 17	1.50%
17 years, but less than 19	1.75%
19 years, but less than 22	2.00%
22 years, but less than 25	2.25%
25+ years	2.50%

Tier 3:

Benefit multiplier (below) times Average Monthly Benefit Compensation times Credited Service (maximum benefit of 80% of Average Monthly Benefit Compensation):

<u>Credited Service</u>	<u>Benefit Multiplier</u>
15 years, but less than 17	1.50%
17 years, but less than 19	1.75%
19 years, but less than 22	2.00%
22 years, but less than 25	2.25%
25+ years	2.50%

Form of Benefit

For married retirees, an annuity payable for the life of the member with 80% continuing to the eligible spouse upon death. For unmarried retirees, the normal form is a single life annuity.

Early Retirement

Date **Only applicable to Tier 3 members:**
Attainment of age 52.5 and 15 years of Credited Service.

Benefit Actuarial equivalent of Normal Retirement benefit.

Disability Benefit – Accidental (duty-related)

Eligibility Total and permanent disability incurred in performance of duty.

Benefit Amount A maximum of:
a.) 50% of Average Monthly Benefit Compensation, and;
b.) The monthly Normal Retirement pension that the member is entitled to receive if he or she retired immediately.

Disability Benefit – Ordinary (not duty-related)

Eligibility Total and permanent disability not incurred in performance of duty.

Benefit Amount Normal Retirement pension that the member is entitled to receive prorated on Credited Service (maximum 20 years) over 20.

Disability Benefit – Other

Temporary Benefit equals 1/12 of 50% of compensation during year preceding date of disability. Payments terminate after 12 months.

Catastrophic Benefit equals 90% of Average Monthly Benefit Compensation. After 60 months member receives greater of 62.5% Average Monthly Benefit Compensation and accrued normal pension.

Pre-Retirement Death Benefit

Service Incurred 100% of Average Monthly Benefit Compensation, reduced by child's pension.

Non-Service Incurred 80% of benefit based on calculation for accidental disability retirement.

Child's Pension 10% of pension for each child (maximum 20% paid) based on calculation for accidental disability retirement. Payable to dependent child under age 18 (23, if full-time student).

Guardian's Pension Same as spouse's pension. Payable (along with child's pension) when no spouse is being paid and there is at least one child under 18 (23, if full-time student).

Vesting (Termination)

Vesting Service Requirement **Tier 1:**
10 years of Credited Service.

Tiers 2 & 3:
15 years of Credited Service.

Non-Vested Benefit

Tier 1:
Lump sum payment of accumulated contributions, plus additional amount based on years of Credited Service.

<u>Service</u>	<u>Additional % of Contributions</u>
Less than 5 years	0%
5 years	25%
6 years	40%
7 years	55%
8 years	70%
9 years	85%
10+ years	100%

Tiers 2 & 3:
Lump sum payment of accumulated contributions, with interest at rate determined by the Board.

Vested Benefit

Tier 1:
Deferred retirement annuity based on two times member's accumulated contributions, deferred to age 62. Member is not entitled to survivor benefits, benefit increases, or group health insurance subsidy.

Tiers 2 & 3:
Calculated same as normal retirement pension. Payable if contributions left in fund until reach age requirement. Member is entitled to survivor benefits, benefit increases, and group health insurance subsidy.

Cost-of-Living Adjustment

Payable to retired member or survivor of retired member

Tiers 1 & 2:
Compound cost-of-living adjustment on base benefit. First payment is made on July 1, 2018, with annual adjustments effective every July 1 thereafter.

Cost-of-living adjustment will be based on the average annual percentage change in the Metropolitan Phoenix-Mesa Consumer Price Index published by the United States Department of Labor, Bureau of Statistics. Maximum increase of 2%.

Tier 3:

Compound cost-of-living adjustment on base benefit beginning earlier of first calendar year after the 7th anniversary of retirement or when the retired member reaches 60 years of age.

A cost-of-living adjustment shall be paid on July 1 each year that the funded ratio for members hired on or after July 1, 2017 is 70% or more.

The cost-of-living adjustment will be based on the average annual percentage change in the Metropolitan Phoenix-Mesa Consumer Price Index published by the United States Department of Labor, Bureau of Statistics. The cost-of-living adjustment will not exceed:

- 2%, if funded ratio for members who are hired on or after July 1, 2017 is 90% or more;
- 1.5%, if funded ratio for members who are hired on or after July 1, 2017 is 80-90%;
- 1%, if funded ratio for members who are hired on or after July 1, 2017 is 70-80%.

Deferred Retirement Option Plan (DROP):

Eligibility	Tier 1 and 20 years of Credited Service.	
DRO Period	Maximum 60 months.	
Member Contributions	Cease upon DROP entry.	
Benefit Amount	Calculated based on Credited Service and average monthly compensation as of the beginning of the DROP period, credited to DROP participation account for DROP period.	
Interest on DROP Participation Account	<u>Beginning Year</u>	<u>Interest Rate</u>
	July 1, 2015	7.50%
	July 1, 2016	7.40%
	July 1, 2017	7.40%
	July 1, 2018	7.30%
	July 1, 2019	7.30%
Payment of DROP Participation Account	Payable as lump sum distribution to Public Safety Personnel Defined Contribution Retirement Plan at end of DROP period or at termination.	
Payment Monthly Benefit	System commences payment of benefit amount at the earlier of 1) the end of the DROP period and 2) at termination.	

Post-Retirement Health Insurance Subsidy

Eligibility Retired member or survivor who elect health coverage provided by the state or participating employer.

Maximum Subsidy Amounts (monthly)		<u>Member Only</u>	<u>With Dependents</u>
	Medicare Eligible	\$100	\$170
	One w/ Medicare	N/A	\$215
	Not Medicare Eligible	\$150	\$260

Employee Contributions

Members hired before July 20, 2011:

7.65%

Members hired on/after July 20, 2011, but before July 1, 2017:

11.65%. Amounts in excess of 7.65% are not used to reduce the employer contribution (“maintenance of effort”).

Tier 3:

50% of total contribution, which is Normal Cost plus a level-dollar amortization of unfunded actuarial accrued liability over a closed period not to exceed 10 years.

Employer Contributions

Tiers 1 & 2:

Normal Cost plus amortization of unfunded actuarial accrued liability over a closed period not to exceed 20 years (subject to one-time election to extend to closed period not to exceed 30 years). Contribution will never be less than 8% of payroll.

Tier 3:

50% of total contribution, which is Normal Cost plus a level-dollar amortization of unfunded actuarial accrued liability over a closed period not to exceed 10 years.

Changes to Benefit Provisions Since the Prior Valuation

None.

IX. ACTUARIAL FUNDING POLICY

The purpose of this Actuarial Funding Policy is to record the funding objectives and policy set by the Board for the Arizona Public Safety Personnel Retirement System (PSPRS). The Board establishes this Funding Policy to help ensure the systematic funding of future benefit payments for members of the Retirement System.

This funding policy was reviewed by the Board annually for several years following initial adoption until the 2017 experience study. Subsequently, it shall be reviewed every five years in conjunction with the experience study, although some adjustments may be warranted sooner to properly reflect Tier 3 benefits and changes to amortization methodology.

Funding Objectives

1. Maintain adequate assets so that current plan assets plus future contributions and investment earnings are sufficient to fund all benefits expected to be paid to members and their beneficiaries.
2. Maintain stability of employer contribution rates, consistent with other funding objectives.
3. Maintain public policy goals of accountability and transparency. Each policy element is clear in intent and effect, and each should allow an assessment of whether, how and when the funding requirements of the plan will be met.
4. Promote intergenerational equity. Each generation of members and employers should incur the cost of benefits for the employees who provides services to them, rather than deferring those costs to future members and employers.
5. Provide a reasonable margin for adverse experience to help offset risks.
6. Continue progress of systematic reduction of the Unfunded Actuarial Accrued Liability (UAAL).

Elements of Actuarial Funding Policy

1. Actuarial Cost Method

- a. The Entry Age Normal level percent of pay actuarial cost method of valuation shall be used in determining the Actuarial Accrued Liability (AAL) and Normal Cost. Differences in the past between assumed experience and actual experience (“actuarial gains and losses”) shall become part of the AAL. The Normal Cost shall be determined on an individual basis for each active member.

2. Asset Smoothing Method

- a. The investment gains or losses of each valuation period, resulting from the difference between the actual investment return and assumed investment return, shall be recognized annually in level amounts over seven years in calculating the Actuarial Value of Assets.
- b. The Actuarial Value of Assets so determined shall be subject to a 20% corridor relative to the Market Value of Assets.

3. Amortization Method

- a. The Actuarial Value of Assets are subtracted from the computed AAL. Any unfunded amount is amortized as a level percent of payroll over a closed period. If the Actuarial Value of Assets exceeds the AAL, the excess is amortized over an open period of 20 years and applied as a credit to reduce the Normal Cost otherwise payable.

4. Funding Target

- a. The targeted funded ratio shall be 100%.
- b. The maximum amortization period shall be 30 years.
- c. If the funding ratio is between 100% and 120%, a minimum contribution equal to the Normal Cost will be made.

5. Risk Management

- a. Assumption Changes
 - i. The actuarial assumptions used shall be those last adopted by the PSPRS Board based on the most recent experience study and upon the advice and recommendation of the actuary. In accordance with best practices, the actuary shall conduct an experience study every five years. The results of the study shall be the basis for the actuarial assumption changes recommended to the PSPRS Board.
 - ii. The actuarial assumptions can be updated during the five-year period if significant plan design changes or other significant events occur, as advised by the actuary.
- b. Amortization Method
 - i. The amortization method, Level Percent Closed, will ensure full payment of the UAAL over a finite, systematically decreasing period not to exceed 30 years. The amortization period will be reviewed once the period reaches 15 years.
- c. Risk Measures
 - i. The following risk measures will be annually determined to provide quantifiable measurements of risk and their movement over time.
 1. Classic measures currently determined
 - Funded ratio (assets / liability)
 2. UAAL / Total Payroll
 - Measures the risk associated with contribution decreases relative impact on the ability to fund the UAAL. An increase in this measure indicates an increase in contribution risk.
 3. Total Liability / Total Payroll
 - Measures the risk associated with the ability to respond to liability experience through adjustments in contributions. An increase in this measure indicates an increase in experience risk.

X. GLOSSARY

Actuarial Accrued Liability – Computed differently under different funding methods, the actuarial accrued liability generally represents the portion of the actuarial present value of benefits attributable to service credit earned (or accrued) as of the valuation date.

Actuarial Present Value of Benefits – Amount which, together with future interest, is expected to be sufficient to pay all benefits to be paid in the future, regardless of when earned, as determined by the application of a particular set of actuarial assumptions; equivalent to the actuarial accrued liability plus the present value of future normal costs attributable to the members.

Actuarial Assumptions – Assumptions as to the occurrence of future events affecting pension costs. These assumptions include rates of investment earnings, changes in salary, rates of mortality, withdrawal, disablement, and retirement as well as statistics related to marriage and family composition.

Actuarial Cost Method – A method of determining the portion of the cost of a pension plan to be allocated to each year; sometimes referred to as the "actuarial funding method." Each cost method allocates a certain portion of the actuarial present value of benefits between the actuarial accrued liability and future normal costs.

Actuarial Equivalence – Series of payments with equal actuarial present values on a given date when valued using the same set of actuarial assumptions.

Actuarial Present Value - The amount of funds required as of a specified date to provide a payment or series of payments in the future. It is determined by discounting future payments at predetermined rates of interest, and by probabilities of payments between the specified date and the expected date of payment.

Actuarial Value of Assets – The value of cash, investments, and other property belonging to the pension plan as used by the actuary for the purpose of the actuarial valuation. This may correspond to market value of assets, or some modification using an asset valuation method to reduce the volatility of asset values.

Asset Gain (Loss) – That portion of the actuarial gain attributable to investment performance above (below) the expected rate of return in the actuarial assumptions.

Amortization – Paying off an interest-discounted amount with periodic payments of interest and (generally) principal, as opposed to paying off with a lump sum payment.

Amortization Payment – That portion of the pension plan contribution designated to pay interest and reduce the outstanding principal balance of unfunded actuarial accrued liability. If the amortization payment is less than the accrued interest on the unfunded actuarial accrued liability the outstanding principal balance will increase.

Assumed Earnings Rate – The interest rate used in developing present values to reflect the time value of money.

Decrements – Events which result in the termination of membership in the system such as retirement, disability, withdrawal, or death.

Entry Age Normal (EAN) Funding Method – A standard actuarial funding method whereby each member's normal costs (service costs) are generally level as a percentage of pay from entry age until retirement. The annual cost of benefits is comprised of the normal cost plus an amortization payment to reduce the UAL.

Experience Gain (Loss) – The difference between actual unfunded actuarial accrued liabilities and anticipated unfunded actuarial accrued liabilities during the period between two valuation dates. It is a measurement of the difference between actual and expected experience, and may be related to investment earnings above (or below) those expected or changes in the liability due to fewer (or greater) than expected numbers of retirements, deaths, disabilities, or withdrawals, or variances in pay increases relative to assumed pay increases. The effect of such gains (or losses) is to decrease (or increase) future costs.

Funded Ratio – A measure of the ratio of the actuarial value of assets to liabilities of the system. Typically, the assets used in the measure are the actuarial value of assets as determined by the asset valuation method. The funded ratio depends not only on the financial strength of the plan but also on the asset valuation method used to determine the assets and on the funding method used to determine the liabilities.

Market Value of Assets (MVA) – The value of assets as they would trade on an open market.

Normal Cost – Computed differently under different funding methods, generally that portion of the actuarial present value of benefits allocated to the current plan year.

Unfunded Actuarial Accrued Liability (UAAL) – The excess of the actuarial accrued liability over the valuation assets; sometimes referred to as "unfunded past service liability". UAL increases each time an actuarial loss occurs and when new benefits are added without being fully funded initially and decreases when actuarial gains occur.

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**ARIZONA PUBLIC SAFETY PERSONNEL
RETIREMENT SYSTEM**

U OF A CAMPUS POLICE (045)

ACTUARIAL VALUATION
AS OF JUNE 30, 2020

CONTRIBUTIONS APPLICABLE TO THE
PLAN/FISCAL YEAR ENDING JUNE 30, 2022



FOSTER & FOSTER
ACTUARIES AND CONSULTANTS

December 2020

Board of Trustees
Arizona Public Safety Personnel Retirement System
Phoenix, AZ

Re: Actuarial Valuation Report as of June 30, 2020 for U of A Campus Police (045)

Dear Members of the Board:

We are pleased to present to the Board this report of the annual actuarial valuation of the Arizona Public Safety Personnel Retirement System (PSPRS). The valuation was performed to determine whether the assets and contributions are sufficient to provide the prescribed benefits and to develop the appropriate funding requirements for the applicable plan year.

This report was prepared at the request of the Board and is intended for use by PSPRS and those designated or approved by the Board. It documents the valuation of the consolidated plan and provides summary information for PSPRS participating employers. This report may be provided to parties other than PSPRS only in its entirety and only with the permission of the Board. Foster & Foster is not responsible for the unauthorized use of this report.

The valuation has been conducted in accordance with generally accepted actuarial principles and practices, including the applicable Actuarial Standards of Practice as issued by the Actuarial Standards Board, and reflects laws and regulations issued to date pursuant to the provisions of Title 38, Chapter 5, Article 4 of the Arizona Revised Statutes, as well as applicable federal laws and regulations. In our opinion, the assumptions used in this valuation, as adopted by the Board of Trustees, represent reasonable expectations of anticipated plan experience. Future actuarial measurements may differ significantly from the current measurements presented in this report for a variety of reasons including changes in applicable laws, changes in plan provisions, changes in assumptions, or plan experience differing from expectations. Due to the limited scope of the valuation, we did not perform an analysis of the potential range of such future measurements.

The computed contribution rates shown in the "Contribution Results" section should be considered minimum contribution rates that comply with the Board's funding policy and Arizona Statutes. Users of this report should be aware that contributions made at that rate do not guarantee benefit security. Given the importance of benefit security to any retirement system, we suggest that contributions to the System in excess of those presented in this report be considered.

The funding percentages and unfunded accrued liability as measured based on the actuarial value of assets will differ from similar measures based on the market value of assets. These measures, as provided, are appropriate for determining the adequacy of future contributions, but may not be appropriate for the purpose of settling a portion or all of the Plan's liabilities.

In conducting the valuation, we have relied on personnel, plan design, and asset information supplied by PSPRS through June 30, 2020 and the actuarial assumptions and methods described in the Actuarial Assumptions section of this report. While we cannot verify the accuracy of all this information, the supplied information was reviewed for consistency and reasonableness. As a result of this review, we have no reason to doubt the substantial accuracy of the information and believe that it has produced appropriate results. This information, along with any adjustments or modifications, is summarized in various sections of this report.

This valuation assumes the continuing ability of the participating employers to make the contributions necessary to fund this plan. A determination regarding whether or not the participating employers are actually able to do so is outside our scope of expertise. Consequently, we did not perform such an analysis.


The undersigned are familiar with the immediate and long-term aspects of pension valuations and meet the Qualification Standards of the American Academy of Actuaries necessary to render the actuarial opinions contained herein. All sections of this report are considered an integral part of the actuarial opinions.

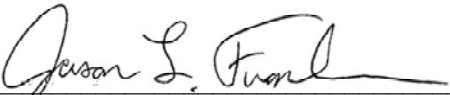
To our knowledge, no associate of Foster & Foster, Inc. working on valuations of the program has any direct financial interest or indirect material interest in the Arizona Public Safety Personnel Retirement System, nor does anyone at Foster & Foster, Inc. act as a member of the Board of Trustees of the Arizona Public Safety Personnel Retirement System. Thus, there is no relationship existing that might affect our capacity to prepare and certify this actuarial report.

If there are any questions, concerns, or comments about any of the items contained in this report, please contact us at 239-433-5500.

Respectfully Submitted,

Foster & Foster, Inc.

By: 
Bradley R. Heinrichs, FSA, EA, MAAA

By: 
Jason L. Franken, FSA, EA, MAAA

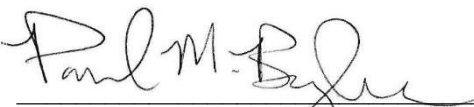
By: 
Paul M. Baugher, FSA, EA, MAAA

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I. SUMMARY OF REPORT

The regular annual actuarial valuation of the Arizona Public Safety Personnel Retirement System for the U of A Campus Police, performed as of June 30, 2020, has been completed and the results are presented in this Report. The purpose of this valuation is to:

- Compute the liabilities associated with benefits likely to be paid on behalf of current retired and active members. This information is contained in the section entitled “Liability Support.”
- Compare accumulated assets with the liabilities to assess the funded condition. This information is contained in the section entitled “Liability Support.”
- Compute the employers’ recommended contribution rates for the Fiscal Year beginning July 1, 2021. This information is contained in the section entitled “Contribution Results.”

1. Key Valuation Results

The funded status as of June 30, 2020 and the employer contribution amounts applicable to the plan/fiscal year ending June 30, 2022 are as follows:

	Tier 1 & Tier 2 Members			Tier 3 Members *		
	Pension	Health	Total	Pension	Health	Total
Employer Contribution Rate	48.53%	0.63%	49.16%	9.05%	0.13%	9.18%
Funded Status	54.0%	93.3%	54.7%	101.4%	203.9%	103.0%

2. Comparison of Key Results to Prior Year

The chart below compares the results from this valuation with the results of the prior year’s valuation (as of June 30, 2019):

Contribution Rate

Valuation Date	Tier 1 & Tier 2 Members			Tier 3 Members *		
	Pension	Health	Total	Pension	Health	Total
June 30, 2019	49.41%	0.71%	50.12%	9.21%	0.14%	9.35%
June 30, 2020	48.53%	0.63%	49.16%	9.05%	0.13%	9.18%

Funded Status

Valuation Date	Tier 1 & Tier 2 Members			Tier 3 Members		
	Pension	Health	Total	Pension	Health	Total
June 30, 2019	51.1%	90.1%	51.9%	116.9%	205.3%	118.4%
June 30, 2020	54.0%	93.3%	54.7%	101.4%	203.9%	103.0%

* The Tier 3 rates shown are the calculated rates as of the valuation date and do not reflect any Legacy costs that the employer must also contribute.

3. Reasons for Change

Changes in the results from the prior year’s valuation can be illustrated in the following tables along with high-level explanations for the entire System below:

	Contribution Rate			
	Tier 1 & Tier 2		Tier 3 Members	
	Pension	Health	Pension	Health
Contribution Rate Last Valuation	49.41%	0.71%	9.21%	0.14%
Asset Experience	0.87%	0.03%	0.02%	0.00%
Payroll Base	0.20%	0.00%	0.02%	(0.02%)
Liability Experience	(5.85%)	(0.15%)	(0.15%)	0.00%
Assumption/Method Change	0.29%	0.00%	0.00%	0.00%
Other	<u>3.61%</u>	<u>0.04%</u>	<u>(0.05%)</u>	<u>0.01%</u>
Contribution Rate This Valuation	48.53%	0.63%	9.05%	0.13%

	Funded Status			
	Tier 1 & Tier 2		Tier 3 Members	
	Pension	Health	Pension	Health
Funded Status Last Valuation	51.1%	90.1%	116.9%	205.3%
Asset Experience	(0.9%)	(1.9%)	(0.6%)	(1.2%)
Liability Experience	3.2%	6.7%	4.1%	5.4%
Assumption/Method Change	0.0%	0.0%	0.0%	0.0%
Other	<u>0.6%</u>	<u>(1.6%)</u>	<u>(19.0%)</u>	<u>(5.6%)</u>
Funded Status This Valuation	54.0%	93.3%	101.4%	203.9%

Assets Experience – Asset gains and losses (relative to the assumed earnings rate) are smoothed over seven years for Tiers 1 and 2 and over five years for Tier 3. The return on the market value of assets for the year ending June 30, 2020 was 1.2% for Tiers 1 and 2 and 1.7% for Tier 3. On a smoothed, actuarial value of assets basis, however, the average return was 5.4% for Tiers 1 and 2 and 6.1% for Tier 3. This fell short of the 2019 assumed earnings rate for Tiers 1 and 2 of 7.3% and for Tier 3 of 7.0%.

Liability Experience – Experience overall was unfavorable, driven by less than expected inactive mortality and turnover.

Payroll Base – Under the current amortization policy for Tiers 1 and 2, the contribution rate is developed as a level percentage of payroll. The payroll is expected to increase each year in line with the growth assumption (currently 3.50%). To the extent that actual payroll is lower/greater than expected, the contribution rate will increase/decrease as a result.

Assumption / Method Change – The amortization method for Tiers 1 and 2 was updated to use a layered approach. New bases will be amortized on a Level Dollar basis while the 2019 base will continue to be amortized on a Level Percentage of Payroll basis.

Other – This is the combination of all other factors that could impact liabilities year-over-year, with the primary sources being changes resulting from an updated understanding of some data components provided by staff and changes in member data. Note that Tier 3 experience will stabilize as the group matures.

4. Looking Ahead

The continuing effect of prior asset losses was dampened by the asset smoothing reflected in the actuarial value of assets. There remain unrecognized investment losses that will, in the absence of other gains, put upward pressure on the contribution rate next year.

If the June 30, 2020 pension valuation results were based on the market value of assets instead of the actuarial value of assets, the pension funded percentage for Tiers 1 and 2 would be 50.1% (instead of 54.0%) and the pension employer contribution requirement would be 52.11% of payroll (instead of 48.53%).

5. Conclusion

The funded status for Tiers 1 and 2 will continue to improve if assumptions are met and contributions at least equal to the rates determined for each employer are made to the fund. The recent adoption of a layered amortization approach along with a plan to systematically lower the payroll growth assumption was an excellent step to improve funding and ensure the Plan is on a viable path.

The funded status for Tier 3 will stabilize as the population continues to grow, as contributions appear sufficient to keep the liabilities fully funded.

II. CONTRIBUTION RESULTS

Contribution Requirements

Development of Employer Contributions - Tiers 1 & 2 Members				
Valuation Date	June 30, 2020		June 30, 2019	
Applicable to Fiscal Year Ending	2022		2021	
	Rate	Dollar	Rate	Dollar
Pension				
Normal Cost				
Total Normal Cost	20.35%	\$ 682,013	21.87%	\$ 757,644
Employee Cost	<u>(7.65%)</u>	<u>(256,383)</u>	<u>(7.65%)</u>	<u>(265,068)</u>
Employer (Net) Normal Cost	12.70%	425,630	14.22%	492,576
Amortization of Unfunded Liability	<u>35.83%</u>	<u>1,200,813</u>	<u>35.19%</u>	<u>1,306,158</u>
Total Employer Cost (Pension)	48.53%	1,626,443	49.41%	1,798,734
Health				
Normal Cost	0.53%	17,763	0.58%	20,000
Amortization of Unfunded Liability	<u>0.10%</u>	<u>3,351</u>	<u>0.13%</u>	<u>4,825</u>
Total Employer Cost (Health)	0.63%	21,114	0.71%	24,825
Total Employer Cost (Pension + Health)	49.16%	1,647,557	50.12%	1,823,559
Total Minimum Contribution Requirement (if applicable)	0.00%		0.00%	
Alternate Contribution Rate (ACR) *	35.93%		35.32%	
Underlying Payroll (as of valuation date)		3,238,084		3,464,941

* The Alternate Contribution Rate is the sum of the positive amortization rates for Tiers 1 & 2 Pension and Health and is charged when retirees return to active status.

The results above are shown both prior to and after the application of the statutory minimum contribution requirement of 8% of payroll (5% of payroll if the actual employer contribution is less than 5% for the 2006/2007 Fiscal Year) and are based on the current amortization schedule approved by the Board of Trustees for your individual plan (see "Actuarial Assumptions and Methods").

A.R.S. 38-843, subsection I allows for the employer to request a one-time increase in the amortization period up to a maximum of 30 years. The costs below are provided to assist with that decision, where needed. If the current approved amortization period is greater than those below, that request has already been made for this plan and the following is provided to facilitate earlier payoff, if desired.

	Rate	Dollar
Total Pension Employer Cost (25-year amortization)	39.77%	1,332,926
Total Pension Employer Cost (30-year amortization)	37.09%	1,243,132

Development of Employer Contributions – Tier 3 Members

Valuation Date	June 30, 2020	June 30, 2019
Applicable to Fiscal Year Ending	2022	2021

Defined Benefit (DB) Retirement Plan

	Rate	Dollar	Rate	Dollar
Pension				
Total Normal Cost	18.10%	\$ 98,364	18.41%	\$ 37,062
Amortization of Unfunded Liability	<u>0.00%</u>	<u>0</u>	<u>0.00%</u>	<u>0</u>
Total Pension Cost	18.10%	98,364	18.41%	37,062
Employee (EE) Pension Cost	9.05%	49,182	9.21%	18,531
Employer (ER) Pension Cost	9.05%	49,182	9.21%	18,531
Health				
Total Normal Cost	0.25%	1,359	0.28%	564
Amortization of Unfunded Liability	<u>0.00%</u>	<u>0</u>	<u>0.00%</u>	<u>0</u>
Total Health Cost	0.25%	1,359	0.28%	564
Employee (EE) Health Cost	0.13%	680	0.14%	282
Employer (ER) Health Cost	0.13%	680	0.14%	282
Total				
Total Calculated Tier 3 Required EE/ER Individual Cost	9.18%	49,862	9.35%	18,813
Board Approved Tier 3 Required EE/ER Individual Cost ¹	9.94%	54,019	9.94%	20,010
ER Legacy Cost of Tiers 1 & 2 Amort of Unfunded Liabilities ²	35.93%	195,261	35.32%	76,168
Total Calculated Tier 3 Required ER Defined Benefit Cost	45.11%	245,123	44.67%	94,981
Total Board Approved Tier 3 Required ER Defined Benefit Cost	45.87%	249,279	45.26%	96,178
Underlying Payroll (as of valuation date)		525,070		201,312

¹ The Board decided to keep Tier 3 rates level (as calculated with the June 30, 2019 valuation) for the fiscal year ending June 30, 2022.

² Pursuant to ARS § 38-843(B), the amortization of positive unfunded liabilities for Tiers 1 & 2 shall be applied to all Tier 3 payroll on a level percent basis. However, while it is statutorily required to present the rates in this manner, these are the minimums where alternate methods for paying down that unfunded liability is at the discretion of each employer. Further, to understand the effects of reform in relation to Tier 3, compare the total rate of Tier 3 before application of those legacy costs.

Development of Employer Contributions – Tier 3 Members

Valuation Date	June 30, 2020	June 30, 2019
Applicable to Fiscal Year Ending	2022	2021

Defined Contribution (DC) Retirement Plan

	Rate	Dollar	Rate	Dollar
Tier 2 & 3 DB / Non-Social Security				
Employee Cost	3.00%		3.00%	
Employer Cost ¹	3.00%		3.00%	
Tier 3 DC Only				
Employee Cost	9.00%	\$ 11,328	9.00%	\$ 10,421
Employee Disability Program Cost	<u>0.88%</u>	<u>1,108</u>	<u>1.41%</u>	<u>1,633</u>
Total Employee Cost	9.88%	12,436	10.41%	12,054
Employer Cost	9.00%	11,328	9.00%	10,421
Employer Disability Program Cost	<u>0.88%</u>	<u>1,108</u>	<u>1.41%</u>	<u>1,633</u>
Total Employer Cost (before Legacy)	9.88%	12,436	10.41%	12,054
ER Legacy Cost of Tiers 1 & 2 Amort of Unfunded Liabilities ²	35.93%	45,223	35.32%	40,897
Total Employer Cost	45.81%	57,659	45.73%	52,951
Underlying Payroll (as of valuation date)		121,607		108,092

¹ Employer rate is 4% for Tier 2 members for a period of time depending on the individual's membership date.

² Pursuant to ARS § 38-843(B), the amortization of positive unfunded liabilities for Tiers 1 & 2 shall be applied to all Tier 3 payroll on a level percent basis. However, while it is statutorily required to present the rates in this manner, these are the minimums where alternate methods for paying down that unfunded liability is at the discretion of each employer. Further, to understand the effects of reform in relation to Tier 3, compare the total rate of Tier 3 before application of those legacy costs.

Contribution Rate Summary

	Tier 1		Tier 2		Tier 3		
Membership Date On or After	7/1/1968	7/20/2011	1/1/2012		7/1/2017		
Participates in Social Security	N/A	N/A	Yes	No	Yes	No	N/A
Available Retirement Plan ¹	DB Only	DB Only	DB Only	Hybrid	DB Only	Hybrid	DC Only
Employee Contribution Rate							
PSPRS DB Rate	7.65%	11.65%	11.65%	11.65%	9.94%	9.94%	
PSPRS DC Rate				3.00%		3.00%	9.00%
PSPDCRP Disability Program Rate							0.88%
Total EE Contribution Rate	7.65%	11.65%	11.65%	14.65%	9.94%	12.94%	9.88%
Employer Contribution Rate							
PSPRS DB Normal Cost	13.23%	13.23%	13.23%	13.23%	9.94%	9.94%	
PSPRS DB Tier 1 & 2 Legacy Cost ²	35.93%	35.93%	35.93%	35.93%	35.93%	35.93%	35.93%
PSPRS DC Rate ³				4.00%		3.00%	9.00%
PSPDCRP Disability Program Rate							0.88%
Total ER Contribution Rate	49.16%	49.16%	49.16%	53.16%	45.87%	48.87%	45.81%

¹ Employers that pay into Social Security on behalf of their members do not participate in the Hybrid Plan.

² Per statute (ARS § 38-843(B)), any positive unfunded liability for Tiers 1 and 2 is to be applied to all Tier 3 (DB and DC) payrolls.

³ The 4.00% employer match for Tier 2 Hybrid members is for a short period of time depending on the membership date of the employee at which point the rate will change to 3.00% (ARS § 38-868(C)).

Exhibit summarizes employee and employer contributions based on Statute and the results of June 30, 2020 actuarial valuation. Pension and health components are combined, where applicable.

Impact of Additional Contributions

	Additional Contribution (000s)											
	\$0	\$100	\$200	\$300	\$400	\$500	\$600	\$700	\$800	\$900	\$1,000	
Impact On												
Funded Status 06/30/2020	54.0%	54.2%	54.5%	54.8%	55.0%	55.3%	55.6%	55.8%	56.1%	56.4%	56.7%	
FYE 2022 Contribution Rate	49.16%	48.91%	48.66%	48.41%	48.16%	47.91%	47.66%	47.41%	47.16%	46.91%	46.66%	

Table shows the hypothetical change in the funded status and contribution rate from the June 30, 2020 actuarial valuation results for Tiers 1 & 2 if an additional contribution of the amount shown had been made to the Fund on June 30, 2020. This illustration can help estimate the impact of contributing additional monies to the fund in the future.

Historical Summary of Employer Rates

	Valuation Date June 30	Fiscal Year Ending June 30	Normal Cost	Pension		Health		Total
				Unfunded Amortization	Total	Normal Cost	Unfunded Amortization	
TIERS 1 & 2	2018	2020	14.15%	34.37%	48.52%	0.38%	0.37%	0.75%
	2019	2021	14.22%	35.19%	49.41%	0.58%	0.13%	0.71%
	2020	2022	12.70%	35.83%	48.53%	0.53%	0.10%	0.63%
TIER 3 ^{1, 2}	2018	2020	9.68%	0.00%	9.68%	0.26%	0.00%	0.26%
	2019	2021	9.68%	0.00%	9.68%	0.26%	0.00%	0.26%
	2020 ²	2022	9.05%	0.00%	9.05%	0.13%	0.00%	0.13%
	2020	2022	9.68%	0.00%	9.68%	0.26%	0.00%	0.26%

¹ Rates shown are Board approved EE/ER rates, unless otherwise noted. Does not reflect Legacy costs that the employer must also contribute.

² Rates shown are calculated EE/ER rates

III. LIABILITY SUPPORT

Liabilities and Funded Ratios by Benefit - Tiers 1 & 2

	June 30, 2020	June 30, 2019
Pension		
Actuarial Present Value of Benefits		
Retirees and Beneficiaries	\$ 16,647,617	\$ 16,197,530
DROP Members	3,609,833	4,320,033
Vested Members	759,541	343,581
Active Members	<u>20,958,843</u>	<u>20,887,054</u>
Total Actuarial Present Value of Benefits	41,975,834	41,748,198
Actuarial Accrued Liability (AAL)		
All Inactive Members	21,016,991	20,861,144
Active Members	<u>15,907,240</u>	<u>15,154,373</u>
Total Actuarial Accrued Liability	36,924,231	36,015,517
Actuarial Value of Assets (AVA)	19,920,697	18,402,015
Unfunded Actuarial Accrued Liability		
Gross Unfunded Actuarial Accrued Liability	17,003,534	17,613,502
Stabilization Reserve	<u>0</u>	<u>0</u>
Net Unfunded Actuarial Accrued Liability	17,003,534	17,613,502
Funded Ratio (AVA / AAL)	54.0%	51.1%
Health		
Present Value of Benefits		
Retirees and Beneficiaries	\$ 330,262	\$ 337,926
DROP Members	52,443	56,457
Active Members	<u>482,714</u>	<u>490,276</u>
Total Present Value of Benefits	865,419	884,659
Actuarial Accrued Liability (AAL)		
All Inactive Members	382,705	394,383
Active Members	<u>368,552</u>	<u>353,992</u>
Total Actuarial Accrued Liability	751,257	748,375
Actuarial Value of Assets (AVA)	700,676	674,263
Unfunded Actuarial Accrued Liability	50,581	74,112
Funded Ratio (AVA / AAL)	93.3%	90.1%

Liabilities and Funded Ratios by Benefit - Tier 3

	June 30, 2020	June 30, 2019
Pension		
Actuarial Present Value of Benefits		
Retirees and Beneficiaries	\$ 429,363	\$ 0
Vested Members	743,741	203,244
Active Members	<u>203,486,437</u>	<u>120,826,663</u>
Total Actuarial Present Value of Benefits	204,659,541	121,029,907
Actuarial Accrued Liability (AAL)		
All Inactive Members	1,173,104	203,244
Active Members	<u>22,066,495</u>	<u>7,753,481</u>
Total Actuarial Accrued Liability	23,239,599	7,956,725
Actuarial Value of Assets (AVA)	23,570,444	9,305,220
Unfunded Actuarial Accrued Liability	(330,845)	(1,348,495)
Funded Ratio (AVA / AAL)	101.4%	116.9%
Health		
Present Value of Benefits		
Retirees and Beneficiaries	0	0
Active Members	<u>2,785,857</u>	<u>1,814,082</u>
Total Present Value of Benefits	2,785,857	1,814,082
Actuarial Accrued Liability (AAL)		
All Inactive Members	0	0
Active Members	<u>353,563</u>	<u>136,597</u>
Total Actuarial Accrued Liability	353,563	136,597
Actuarial Value of Assets (AVA)	721,079	280,404
Unfunded Actuarial Accrued Liability	(367,516)	(143,807)
Funded Ratio (AVA / AAL)	203.9%	205.3%

The liabilities shown on this page are the liabilities for all Tier 3 members grouped together in the Risk Sharing group. These liabilities are NOT the liabilities for U Of A Campus Police Tier 3 members.

Derivation of Experience (Gain)/Loss

	Tiers 1 & 2		Tier 3	
	Pension	Health	Pension	Health
(1) Unfunded Actuarial Accrued Liability as of June 30, 2019	17,613,502	74,112	(1,348,495)	(143,807)
(2) Normal Cost Developed in Last Valuation	492,576	20,000	4,806,265	73,059
(3) Actual Contributions	1,806,665	25,643	6,660,557	411,565
(4) Expected Interest On (1), (2), and (3)	1,256,962	5,951	13,589	(19,922)
(5) Expected Unfunded Actuarial Accrued Liability as of June 30, 2020 (1)+(2)-(3)+(4)	17,556,375	74,420	(3,189,198)	(502,235)
(6) Changes to UAAL Due to Assumptions, Methods and Benefits	0	0	0	0
(7) Change to UAAL Due to Actuarial (Gain)/Loss	<u>(552,841)</u>	<u>(23,839)</u>	<u>2,858,353</u>	<u>134,719</u>
(8) Unfunded Actuarial Accrued Liability as of June 30, 2020	17,003,534	50,581	(330,845)	(367,516)

Amortization of Unfunded Liabilities - Tiers 1 & 2

	Date Established	Outstanding Balance	Years Remaining	Amortization Rate
Pension	06/30/2019	17,591,688	16	36.61%
	06/30/2020	<u>(299,340)</u>	16	<u>(0.78%)</u>
	Total	17,292,348		35.83%
Health	06/30/2019	63,881	16	0.13%
	06/30/2020	<u>(13,300)</u>	16	<u>(0.03%)</u>
	Total	50,581		0.10%

Amortization of Unfunded Liabilities - Tier 3

	Date Established	Outstanding Balance	Years Remaining	Amortization Rate *
Pension	06/30/2018	166,947	8	0.03%
	06/30/2019	(1,419,864)	9	(0.24%)
	06/30/2020	<u>922,072</u>	10	<u>0.15%</u>
	Total	(330,845)		0.00%
Health	06/30/2018	(3,540)	8	0.00%
	06/30/2019	(129,816)	9	(0.02%)
	06/30/2020	<u>(234,160)</u>	10	<u>(0.04%)</u>
	Total	(367,516)		0.00%

* By Statute, negative amortization rates are not subtracted in Tier 3 rate calculations.

IV. ASSET SUPPORT

Statement of Changes in Fiduciary Net Position for Year Ended June 30, 2020 Market Value Basis

	Tiers 1 & 2		Tier 3	
	Pension	Health	Pension	Health
Additions				
Contributions				
Member Contributions	\$ 128,443,154	\$ 0	\$ 14,386,911	\$ 0
Employer Contributions	938,799,348	0	14,392,453	0
Health Insurance Contributions	<u>0</u>	<u>4,741,938</u>	<u>0</u>	<u>909,053</u>
Total Contributions	1,067,242,502	4,741,938	28,779,364	909,053
Investment Income				
Net Increase in Fair Value	58,711,963	1,945,052	350,525	8,778
Interest and Dividends	66,905,282	2,216,486	399,442	10,003
Other Income	26,056,951	1,568,972	155,567	7,081
Less Investment Expenses	<u>(49,802,841)</u>	<u>(1,555,022)</u>	<u>(297,336)</u>	<u>(7,018)</u>
Net Investment Income	101,871,355	4,175,488	608,198	18,844
Transfers In	379,476	0	155,830	0
Total Additions	1,169,493,333	8,917,426	29,543,392	927,897
Deductions				
Distributions to Members				
Benefit Payments	900,036,400	0	0	0
Health Insurance Subsidy	0	17,050,706	0	0
Refund of Contributions	<u>14,184,072</u>	<u>0</u>	<u>157,299</u>	<u>0</u>
Total Distributions	914,220,472	17,050,706	157,299	0
Administrative Expenses	8,356,791	339,564	49,892	1,532
Transfers Out	367,881	0	0	0
Other	0	0	0	0
Total Deductions	922,945,144	17,390,270	207,191	1,532
Net Increase / (Decrease)	246,548,189	(8,472,844)	29,336,201	926,365
Net Position Held in Trust				
Prior Valuation	7,810,990,750	336,551,716	18,922,750	554,433
Beginning of the Year Adjustment	(163)	163	163	(163)
End of the Year	8,057,538,776	328,079,035	48,259,114	1,480,635

Development of Pension Actuarial Value of Assets - Tiers 1 & 2

A. Investment Income

A1. Actual Investment Income	\$ 93,514,564
A2. Expected Amount for Immediate Recognition	575,689,672
A3. Amount Subject to Amortization	(482,175,108)

B. Amortization Schedule	Year Ended June 30						
	2020	2021	2022	2023	2024	2025	2026
2020 Experience (A3 / 7)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,158)	(68,882,160)
2019 Experience	(22,859,275)	(22,859,275)	(22,859,275)	(22,859,275)	(22,859,275)	(22,859,275)	
2018 Experience	(6,266,349)	(6,266,349)	(6,266,349)	(6,266,349)	(6,266,351)		
2017 Experience	33,380,149	33,380,149	33,380,149	33,380,148			
2016 Experience	(64,250,729)	(64,250,729)	(64,250,726)				
2015 Experience	(36,894,248)	(36,894,251)					
2014 Experience	33,458,496						
Total Amortization	(132,314,114)	(165,772,613)	(128,878,359)	(64,627,634)	(98,007,784)	(91,741,433)	(68,882,160)

C. Actuarial Value of Assets	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	8,079,039,739	
C2. Noninvestment Net Cash Flow	153,033,625	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	8,675,448,922	
C4. Market Value of Assets, 06/30/2020	8,057,538,776	18,501,843
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	8,675,448,922	19,920,697

D. Rates of Return

D1. Market Value Rate of Return	1.2%
D2. Actuarial Value Rate of Return	5.4%

Development of Health Actuarial Value of Assets - Tiers 1 & 2

A. Investment Income

A1. Actual Investment Income	\$ 3,835,924
A2. Expected Amount for Immediate Recognition	24,126,918
A3. Amount Subject to Amortization	(20,290,994)

B. Amortization Schedule	Year Ended June 30						
	2020	2021	2022	2023	2024	2025	2026
2020 Experience (A3 / 7)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,713)	(2,898,716)
2019 Experience	(1,075,569)	(1,075,569)	(1,075,569)	(1,075,569)	(1,075,569)	(1,075,572)	
2018 Experience	(304,653)	(304,653)	(304,653)	(304,653)	(304,656)		
2017 Experience	1,532,136	1,532,136	1,532,136	1,532,136			
2016 Experience	(3,221,043)	(3,221,043)	(3,221,044)				
2015 Experience	(1,796,589)	(1,796,586)					
2014 Experience	1,653,381						
Total Amortization	(6,111,050)	(7,764,428)	(5,967,843)	(2,746,799)	(4,278,938)	(3,974,285)	(2,898,716)

C. Actuarial Value of Assets	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	350,002,781	
C2. Noninvestment Net Cash Flow	(12,308,768)	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	355,709,881	
C4. Market Value of Assets, 06/30/2020	328,079,035	646,249
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	355,709,881	700,676

D. Rates of Return

D1. Market Value Rate of Return	1.2%
D2. Actuarial Value Rate of Return	5.2%

Development of Pension Actuarial Value of Assets - Tiers 3

A. Investment Income

A1. Actual Investment Income	\$ 558,306
A2. Expected Amount for Immediate Recognition	2,314,784
A3. Amount Subject to Amortization	(1,756,478)

B. Amortization Schedule	Year Ended June 30				
	2020	2021	2022	2023	2024
2020 Experience (A3 / 5)	(351,296)	(351,296)	(351,296)	(351,296)	(351,294)
2019 Experience	44,435	44,435	44,435	44,437	
2018 Experience	(370)	(370)	(371)		
2017 Experience	0	0			
2016 Experience	0				
Total Amortization	(307,231)	(307,231)	(307,232)	(306,859)	(351,294)

C. Actuarial Value of Assets	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	18,746,119	
C2. Noninvestment Net Cash Flow	28,777,895	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	49,531,567	
C4. Market Value of Assets, 06/30/2020	48,259,114	22,964,925
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	49,531,567	23,570,443

D. Rates of Return

D1. Market Value Rate of Return	1.7%
D2. Actuarial Value Rate of Return	6.1%

Development of Health Actuarial Value of Assets - Tiers 3

A. Investment Income

A1. Actual Investment Income	\$ 17,312
A2. Expected Amount for Immediate Recognition	70,089
A3. Amount Subject to Amortization	(52,777)

B. Amortization Schedule	Year Ended June 30				
	2020	2021	2022	2023	2024
2020 Experience (A3 / 5)	(10,555)	(10,555)	(10,555)	(10,555)	(10,557)
2019 Experience	1,507	1,507	1,507	1,508	
2018 Experience	0	0	(2)		
2017 Experience	0	0			
2016 Experience	0				
Total Amortization	(9,048)	(9,048)	(9,050)	(9,047)	(10,557)

C. Actuarial Value of Assets	Total	Employer
C1. Actuarial Value of Assets, 06/30/2019	548,406	
C2. Noninvestment Net Cash Flow	909,053	
C3. Preliminary Actuarial Value of Assets, 06/30/2020 (A2 + B + C1 + C2)	1,518,500	
C4. Market Value of Assets, 06/30/2020	1,480,635	703,098
C5. Final Actuarial Value of Assets, 06/30/2020 (C3 Within 20% Corridor of C4)	1,518,500	721,078

D. Rates of Return

D1. Market Value Rate of Return	1.7%
D2. Actuarial Value Rate of Return	6.1%

V. MEMBER STATISTICS

Valuation Data Summary

	June 30, 2020		June 30, 2019	
	Tiers 1 & 2	Tier 3	Tiers 1 & 2	Tier 3
Actives				
Number	40	10	44	4
Average Current Age	44.6	27.7	43.5	31.5
Average Age at Employment	28.7	26.7	28.9	30.9
Average Past Service	15.9	1.0	14.6	0.6
Average Annual Salary	\$72,547	\$49,470	\$72,842	\$50,328
Actives (transferred)				
Number	5	0	5	0
Average Current Age	31.7	N/A	31.3	N/A
Average Age at Employment	26.8	N/A	24.8	N/A
Average Past Service	4.9	N/A	6.5	N/A
Average Annual Salary	\$62,865	N/A	\$51,978	N/A
Retirees				
Number	16	0	15	0
Average Current Age	64.0	N/A	63.5	N/A
Average Annual Benefit	\$46,137	N/A	\$43,696	N/A
Drop Retirees				
Number	3	N/A	3	N/A
Average Current Age	53.0	N/A	56.6	N/A
Average Annual Benefit	\$63,679	N/A	\$74,016	N/A
Beneficiaries				
Number	6	0	8	0
Average Current Age	68.9	N/A	71.6	N/A
Average Annual Benefit	\$42,326	N/A	\$40,698	N/A
Disability Retirees				
Number	7	0	7	0
Average Current Age	58.7	N/A	57.8	N/A
Average Annual Benefit	\$40,354	N/A	\$39,563	N/A
Inactive / Vested				
Number	17	0	16	1
Average Current Age	42.3	N/A	42.0	46.3
Average Accumulated Contributions	\$13,996	N/A	\$14,034	\$2,028
Total Number	94	10	98	5
Former Members (transferred)	5	1	3	0

Counts and Pay Summary by Service - Tiers 1 & 2

Age	Past Service							Total Count	Total Pay	Average Pay
	0-4	5-9	10-14	15-19	20-24	25-29	30+			
<20	0	0	0	0	0	0	0	0	0	0
20 - 24	0	0	0	0	0	0	0	0	0	0
25 - 29	1	2	0	0	0	0	0	3	208,332	69,444
30 - 34	0	5	0	0	0	0	0	5	315,085	63,017
35 - 39	2	1	10	1	0	0	0	14	925,222	66,087
40 - 44	0	2	0	1	1	0	0	4	286,866	71,717
45 - 49	0	0	2	2	1	0	0	5	438,507	87,701
50 - 54	0	1	0	3	2	1	0	7	501,953	71,708
55 - 59	0	0	0	3	0	0	3	6	475,504	79,251
60 - 64	0	0	0	1	0	0	0	1	64,724	64,724
65+	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Total	3	11	12	11	4	1	3	45	3,216,193	71,471

Counts and Pay Summary by Service - Tier 3

Age	Past Service							Total Count	Total Pay	Average Pay
	0-4	5-9	10-14	15-19	20-24	25-29	30+			
15 - 19	0	0	0	0	0	0	0	0	0	0
20 - 24	5	0	0	0	0	0	0	5	242,615	48,523
25 - 29	1	0	0	0	0	0	0	1	52,701	52,701
30 - 34	3	0	0	0	0	0	0	3	148,135	49,378
35 - 39	1	0	0	0	0	0	0	1	51,250	51,250
40 - 44	0	0	0	0	0	0	0	0	0	0
45 - 49	0	0	0	0	0	0	0	0	0	0
50 - 54	0	0	0	0	0	0	0	0	0	0
55 - 59	0	0	0	0	0	0	0	0	0	0
60 - 64	0	0	0	0	0	0	0	0	0	0
65+	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Total	10	0	0	0	0	0	0	10	494,701	49,470

VI. ACTUARIAL ASSUMPTIONS AND METHODS

Interest Rate

This is the assumed earnings rate on System assets, compounded annually, net of investment and administrative expenses.

Tiers 1 & 2:

7.30% per year.

Tier 3:

7.00% per year.

Salary Increases

See table below. This is an annual increase for individual member's salary. These rates, which are based on a 2017 experience study using actual plan experience, consist of 3.5% for wage inflation with the remaining portion for merit / seniority increases.

	Maricopa	Pima		Maricopa	Pima	
	County	County	Other	County	County	Other
Age	Police	Police	Police	Fire	Fire	Fire
20	7.50%	7.50%	7.50%	7.50%	7.50%	7.20%
25	7.14%	6.24%	6.60%	7.35%	6.36%	6.60%
30	6.00%	5.16%	5.25%	6.74%	5.48%	5.60%
35	4.77%	4.55%	4.15%	5.56%	4.83%	4.96%
40	3.90%	3.89%	3.60%	4.46%	4.03%	4.44%
45	3.54%	3.56%	3.50%	3.74%	3.60%	3.78%
50+	3.50%	3.50%	3.50%	3.50%	3.50%	3.50%

Inflation

2.50%.

Tier 3 Compensation Limit

\$110,000 for calendar 2020. Assumed increases of 2.00% per year thereafter.

Cost-of-Living Adjustment

1.75%.

Mortality Rates

These rates are used to project future decrements from the population due to death.

Active Lives:

PubS-2010 Employee mortality, loaded 110% for males and females, projected with future mortality improvements reflected generationally using 75% of scale MP-2019. 100% of active deaths are assumed to be in the line of duty.

Inactive Lives

PubS-2010 Healthy Retiree mortality, loaded 110% for males and females, projected with future mortality improvements reflected

generationally using 75% of scale MP-2019.

Beneficiaries:

PubS-2010 Survivor mortality, projected with future mortality improvements reflected generationally using 75% of scale MP-2019.

Disabled Lives:

PubS-2010 Disabled mortality, projected with future mortality improvements reflected generationally using 75% of scale MP-2019.

The mortality assumptions sufficiently accommodate anticipated future mortality improvements.

Retirement / DROP Rates

These rates are used to project future decrements from the active population due to retirement. The rates below are based on a 2017 experience study using actual plan experience.

Tier 1 – reaching age 62 before attaining 20 years of service:

Age-related rates based on age at retirement: 60% assumed at age 62, 50% assumed at ages 63 – 69, and 100% assumed at age 70. Rates are the same for all employers.

Tier 1 – reaching age 62 after attaining 20 years of service:

Service-related rates based on service at retirement:

	Maricopa County	Pima County	Other	Maricopa County	Pima County	Other
<u>Service</u>	<u>Police</u>	<u>Police</u>	<u>Police</u>	<u>Fire</u>	<u>Fire</u>	<u>Fire</u>
20	27%	24%	35%	14%	18%	23%
21	18%	19%	30%	14%	18%	18%
22	14%	14%	23%	7%	11%	11%
23	10%	10%	10%	7%	7%	8%
24	8%	7%	10%	7%	7%	5%
25	38%	32%	36%	22%	22%	30%
26	36%	32%	30%	26%	26%	30%
27	29%	22%	30%	19%	19%	30%
28	29%	22%	30%	32%	25%	25%
29	29%	22%	30%	30%	25%	16%
30	34%	35%	30%	30%	30%	32%
31	34%	35%	30%	30%	30%	35%
32	65%	65%	70%	55%	55%	60%
33	65%	65%	70%	55%	55%	60%
34+	100%	100%	100%	100%	100%	100%

60% are assumed to enter the DROP program while the remaining 40% are assumed to retire and commence benefits immediately.

Tiers 2 & 3:

Age-related rates based on age at retirement:

<u>Age</u>	Maricopa	Pima	Other	Maricopa	Pima	Other
	County	County		County	County	
	<u>Police</u>	<u>Police</u>	<u>Police</u>	<u>Fire</u>	<u>Fire</u>	<u>Fire</u>
53	38%	32%	36%	22%	22%	30%
54	36%	32%	30%	26%	26%	30%
55	29%	22%	30%	19%	19%	30%
56	29%	22%	30%	32%	25%	25%
57	29%	22%	30%	30%	25%	16%
58	34%	35%	30%	30%	30%	32%
59	34%	35%	30%	30%	30%	35%
60-63	65%	65%	70%	55%	55%	60%
64+	100%	100%	100%	100%	100%	100%

Termination Rate

These rates are used to project future decrements from the active population due to termination. Service-related rates based on service at termination are shown below. The rates below apply to members prior to retirement eligibility and are based on a 2017 experience study using actual plan experience.

<u>Service</u>	Maricopa	Pima	Other	Maricopa	Pima	Other
	County	County		County	County	
	<u>Police</u>	<u>Police</u>	<u>Police</u>	<u>Fire</u>	<u>Fire</u>	<u>Fire</u>
1	14.00%	16.00%	16.00%	7.00%	10.00%	9.50%
2	8.50%	9.00%	12.50%	4.50%	5.00%	9.00%
3	6.50%	7.50%	11.50%	3.70%	5.00%	7.50%
4	4.50%	6.00%	9.00%	3.00%	4.00%	7.50%
5	3.60%	6.00%	8.00%	2.50%	4.00%	6.50%
6	3.30%	4.50%	8.00%	1.70%	3.50%	4.50%
7	3.30%	4.50%	7.00%	1.70%	3.00%	4.00%
8	3.30%	3.20%	7.00%	1.70%	2.40%	3.50%
9	2.70%	3.20%	6.50%	1.70%	2.40%	3.50%
10	2.70%	3.20%	6.00%	1.50%	2.40%	3.00%
11	2.70%	3.20%	5.00%	1.10%	2.40%	2.70%
12	1.80%	1.40%	4.00%	0.70%	1.00%	2.00%
13	1.30%	1.40%	3.50%	0.70%	1.00%	2.00%
14	1.30%	1.40%	3.00%	0.70%	1.00%	1.70%
15	1.30%	1.00%	3.00%	0.60%	1.00%	1.20%
16	0.70%	1.00%	2.00%	0.50%	1.00%	1.20%
17	0.70%	1.00%	1.75%	0.50%	0.50%	1.20%
18	0.70%	1.00%	1.75%	0.40%	0.50%	1.20%
19	0.50%	1.00%	1.75%	0.40%	0.50%	1.20%
20+	0.50%	1.00%	1.75%	0.40%	0.50%	0.50%

Disability Rate

These rates are used to project future decrements from the active population due to disability. Sample age-related rates based on age at disability are provided below. These rates are based on a 2017 experience study using actual plan experience. 100% of disablements are assumed to be duty-related.

	Maricopa	Pima		Maricopa	Pima	
	County	County	Other	County	County	Other
Age	Police	Police	Police	Fire	Fire	Fire
20	0.08%	0.08%	0.10%	0.03%	0.03%	0.03%
25	0.08%	0.08%	0.10%	0.03%	0.03%	0.03%
30	0.17%	0.16%	0.20%	0.04%	0.03%	0.03%
35	0.22%	0.21%	0.26%	0.09%	0.07%	0.08%
40	0.36%	0.35%	0.44%	0.17%	0.16%	0.17%
45	0.51%	0.49%	0.62%	0.17%	0.43%	0.48%
50	0.78%	0.75%	0.95%	0.43%	0.59%	0.65%
55	1.02%	0.98%	1.23%	1.00%	1.01%	1.13%

Marital Status

For active members, 85% of males and 60% of females are assumed to be married. Actual marital status is used, where applicable, for inactive members.

Spouse’s Age

Males are assumed to be three years older than females.

Health Care Utilization

For active members, 70% of retirees are expected to utilize retiree health care. Actual utilization is used for inactive members.

Funding Method

Entry Age Normal Cost Method.

Actuarial Asset Method

Method described below. Note that during periods when investment performance exceeds (falls short) of the assumed rate, the actuarial value of assets will tend to be less (greater) than the market value of assets.

Tiers 1 & 2:

Each year the assumed investment income is recognized in full while the difference between actual and assumed investment income are smoothed over a 7-year period subject to a 20% corridor around the market value.

Tier 3:

Each year the assumed investment income is recognized in full while the difference between actual and assumed investment income are smoothed over a 5-year period subject to a 20% corridor around the market value.

Funding Policy Amortization Method

Tiers 1 & 2:

Any positive UAAL (assets less than liabilities) is amortized using a layered approach beginning with the June 30, 2020 valuation, with new amounts determined according to a Level Dollar method over a closed period of 15 years (phased into from current period of at most 30 years). Initial layer from June 30, 2019 valuation continues to be amortized according to a Level Percentage of Payroll method. Any negative UAAL (assets greater than liabilities) is amortized according to a Level Dollar method over an open period of 20 years.

Tier 3:

Any positive UAAL (assets less than liabilities) is amortized according to a Level Dollar method over a closed period of 10 years. No amortization is made of any negative UAAL (assets greater than liabilities).

Payroll Growth

3.50% per year. This is annual increase for total employer payroll.

Stabilization Reserve

Beginning with the June 30, 2007 valuation and with each subsequent valuation, if the actuarial value of assets exceeds the actuarial accrued liability, one half of this excess in each year is allocated to a Stabilization Reserve. This Reserve is excluded from the calculation of the employer contribution rates. The Reserve accumulates as long as the plan is overfunded. Once the plan becomes underfunded, the Stabilization Reserve will be used to dampen increases in the employer contribution rates.

Changes to Actuarial Assumptions and Methods Since the Prior Valuation

The amortization method was changed for Tiers 1 and 2 to use a layered amortization approach.

VII. DISCUSSION OF RISK

ASOP No. 51, Assessment and Disclosure of Risk Associated with Measuring Pension Obligations and Determining Pension Plan Contributions, states that the actuary should identify risks that, in the actuary's professional judgment, may reasonably be anticipated to significantly affect the plan's future financial condition.

Throughout this report, actuarial results are determined under various assumption scenarios. These results are based on the premise that all future plan experience will align with the plan's actuarial assumptions; however, there is no guarantee that actual plan experience will align with the plan's assumptions. Whenever possible, the recommended assumptions in this report reflect conservatism to allow for some margin of unfavorable future plan experience. However, it is still possible that actual plan experience will differ from anticipated experience in an unfavorable manner that will negatively impact the plan's funded position.

Below are examples of ways in which plan experience can deviate from assumptions and the potential impact of that deviation. Typically, this results in an actuarial gain or loss representing the current-year financial impact on the plan's unfunded liability of the experience differing from assumptions; this gain or loss is amortized over a period of time determined by the plan's amortization method. When assumptions are selected that adequately reflect plan experience, gains and losses typically offset one another in the long term, resulting in a relatively low impact on the plan's contribution requirements associated with plan experience. When assumptions are too optimistic, losses can accumulate over time and the plan's amortization payment could potentially grow to an unmanageable level.

- **Investment Return:** When the rate of return on the Actuarial Value of Assets falls short of the assumption, this produces a loss representing assumed investment earnings that were not realized. Further, it is unlikely that the plan will experience a scenario that matches the assumed return in each year as capital markets can be volatile from year to year. Therefore, contribution amounts can vary in the future.
- **Salary Increases:** When a plan participant experiences a salary increase that was greater than assumed, this produces a loss representing the cost of an increase in anticipated plan benefits for the participant as compared to the previous year. The total gain or loss associated with salary increases for the plan is the sum of salary gains and losses for all active participants.
- **Payroll Growth:** The plan's payroll growth assumption, if one is used, causes a predictable annual increase in the plan's amortization payment in order to produce an amortization payment that remains constant as a percentage of payroll if all assumptions are realized. If payroll does not increase according to the plan's payroll growth assumption, the plan's amortization payment can increase significantly as a percentage of payroll even if all assumptions other than the payroll growth assumption are realized.
- **Demographic Assumptions:** Actuarial results take into account various potential events that could happen to a plan participant, such as retirement, termination, disability, and death. Each of these potential events is assigned a liability based on the likelihood of the event and the financial consequence of the event for the plan. Accordingly, actuarial liabilities reflect a blend of financial consequences associated with various possible outcomes (such as retirement at one of various possible ages). Once the outcome is known (e.g. the participant retires) the liability is adjusted to reflect the known outcome. This adjustment

produces a gain or loss depending on whether the outcome was more or less favorable than other outcomes that could have occurred.

- **Contribution risk:** This risk results from the potential that actual employer contributions may deviate from actuarially determined contributions, which are determined in accordance with the Board’s funding policy. The funding policy is intended to result in contribution requirements that if paid when due, will result in a reasonable expectation that assets will accumulate to be sufficient to pay plan benefits when due. Contribution deficits, particularly large deficits and those that occur repeatedly, increase future contribution requirements and put the plan at risk for not being able to pay plan benefits when due.

Impact of Plan Maturity on Risk

For newer pension plans, most of the participants and associated liabilities are related to active members who have not yet reached retirement age. As pension plans continue in operation and active members reach retirement ages, liabilities begin to shift from being primarily related to active members to being shared amongst active and retired members. Plan maturity is a measure of the extent to which this shift has occurred. It is important to understand that plan maturity can have an impact on risk tolerance and the overall risk characteristics of the plan. For example, plans with a large amount of retired liability do not have as long of a time horizon to recover from losses (such as losses on investments due to lower than expected investment returns) as plans where the majority of the liability is attributable to active members. For this reason, less tolerance for investment risk may be warranted for highly mature plans with a substantial inactive liability. Similarly, mature plans paying substantial retirement benefits resulting in a small positive or net negative cash flow can be more sensitive to near term investment volatility, particularly if the size of the fund is shrinking, which can result in less assets being available for investment in the market.

To assist with determining the maturity of the plan, we have provided some relevant metrics in the table following titled “Plan Maturity Measures and Other Risk Metrics.” For a better understanding of the overall Plan and the impact of these risks, please refer to the consolidated PSPRS valuation report.

Plan Maturity Measures and Other Risk Metrics

	Tiers 1 & 2			Tier 3 ¹		
	06/30/2018	06/30/2019	06/30/2020	06/30/2018	06/30/2019	06/30/2020
Support Ratio						
Total Actives	51	49	45	419	944	1,408
Total Inactives	53	49	49	23	57	130
Actives / Inactives	96.2%	100.0%	91.8%	1,821.7%	1,656.1%	1,083.1%
Asset Volatility Ratio						
Market Value of Assets (MVA)		17,791,467	18,501,843		9,392,896	22,964,925
Total Annual Payroll		3,464,941	3,216,193		50,420,565	84,448,996
MVA / Total Annual Payroll		513.5%	575.3%		18.6%	27.2%
Accrued Liability (AL) Ratio						
Inactive Accrued Liability	19,911,298	20,861,144	21,016,991		203,244	1,173,104
Total Accrued Liability	33,585,947	36,015,517	36,924,231		7,956,725	23,239,599
Inactive AL / Total AL	59.3%	57.9%	56.9%		2.6%	5.0%
Funded Ratio						
Actuarial Value of Assets (AVA)	16,791,354	18,402,015	19,920,697	1,635,349	9,305,220	23,570,444
Total Accrued Liability	33,585,947	36,015,517	36,924,231	1,831,715	7,956,725	23,239,599
AVA / Total Accrued Liability	50.0%	51.1%	54.0%	89.3%	116.9%	101.4%
Net Cash Flow Ratio						
Net Cash Flow ²		494,741	288,638		7,281,178	13,192,598
Market Value of Assets (MVA)		17,791,467	18,501,843		9,392,896	22,964,925
Net Cash Flow / MVA		2.8%	1.6%		77.5%	57.4%

¹ Tier 3 results are shown for the Risk Sharing group, where applicable.

² Determined as total contributions minus benefit payments. Administrative expenses are typically included but are considered part of the net interest rate assumption for this plan.

VIII. SUMMARY OF CURRENT PLAN

The following is a summary of the benefit provisions provided in Title 38, Chapter 5, Article 4 of the Arizona Revised Statutes.

Membership Full-time employees of an eligible group, prior to attaining age 65, who are engaged to work for more than six months in a calendar year.

Benefit Tiers Benefits differ for members based on their hire date:

<u>Tier</u>	<u>Hire Date</u>
1	Hired before January 1, 2012
2	Hired on or after January 1, 2012 but before July 1, 2017
3	Hired on or after July 1, 2017

Compensation Compensation is the amount including base salary, overtime pay, shift and military differential pay, compensatory time used in lieu of overtime pay, and holiday pay, paid to an employee on a regular payroll basis and longevity pay paid at least every six months for which contributions are made to the System. For Tier 3 members, compensation is limited by statutory cap (\$110,000 with adjustments by the Board).

Average Monthly Benefit Compensation **Tier 1:**
The highest compensation paid to member during three consecutive years out of the last 20 years of Credited Service, divided by months.

Tier 2:
The highest compensation paid to member during five consecutive years out of the last 20 years of Credited Service, divided by months.

Tier 3:
The highest compensation paid to member during five consecutive years out of the last 15 years of Credited Service, divided by months.

Credited Service Total periods of service, both before and after the member's date of participation, for which the member made contributions to the fund.

Normal Retirement Date **Tier 1:**
First day of month following attainment of 1) 20 years of service or 2) 62nd birthday and completion of 15 years of service.

Tier 2:

First day of month following the attainment of age 52.5 and completion of 15 years of service.

Tier 3:

First day of month following the attainment of age 55 and completion of 15 years of service.

Benefit

Tier 1:

50% of Average Monthly Benefit Compensation, adjusted based on Credited Service as follows (maximum benefit of 80% of Average Monthly Benefit Compensation):

<u>Credited Service</u>	<u>Benefit Adjustment</u>
15 years, but less than 20	Reduced 4% per year less than 20
20 years, but less than 25	Plus 2% per year between 20 and 25
25+ years	Plus 2.5% per year above 20

Tier 2:

Benefit multiplier (below) times Average Monthly Benefit Compensation times Credited Service (maximum benefit of 80% of Average Monthly Benefit Compensation):

<u>Credited Service</u>	<u>Benefit Multiplier</u>
15 years, but less than 17	1.50%
17 years, but less than 19	1.75%
19 years, but less than 22	2.00%
22 years, but less than 25	2.25%
25+ years	2.50%

Tier 3:

Benefit multiplier (below) times Average Monthly Benefit Compensation times Credited Service (maximum benefit of 80% of Average Monthly Benefit Compensation):

<u>Credited Service</u>	<u>Benefit Multiplier</u>
15 years, but less than 17	1.50%
17 years, but less than 19	1.75%
19 years, but less than 22	2.00%
22 years, but less than 25	2.25%
25+ years	2.50%

Form of Benefit

For married retirees, an annuity payable for the life of the member with 80% continuing to the eligible spouse upon death. For unmarried retirees, the normal form is a single life annuity.

Early Retirement

Date	Only applicable to Tier 3 members: Attainment of age 52.5 and 15 years of Credited Service.
Benefit	Actuarial equivalent of Normal Retirement benefit.

Disability Benefit – Accidental (duty-related)

Eligibility	Total and permanent disability incurred in performance of duty.
Benefit Amount	A maximum of: a.) 50% of Average Monthly Benefit Compensation, and; b.) The monthly Normal Retirement pension that the member is entitled to receive if he or she retired immediately.

Disability Benefit – Ordinary (not duty-related)

Eligibility	Total and permanent disability not incurred in performance of duty.
Benefit Amount	Normal Retirement pension that the member is entitled to receive prorated on Credited Service (maximum 20 years) over 20.

Disability Benefit – Other

Temporary	Benefit equals 1/12 of 50% of compensation during year preceding date of disability. Payments terminate after 12 months.
Catastrophic	Benefit equals 90% of Average Monthly Benefit Compensation. After 60 months member receives greater of 62.5% Average Monthly Benefit Compensation and accrued normal pension.

Pre-Retirement Death Benefit

Service Incurred	100% of Average Monthly Benefit Compensation, reduced by child's pension.
Non-Service Incurred	80% of benefit based on calculation for accidental disability retirement.
Child's Pension	10% of pension for each child (maximum 20% paid) based on calculation for accidental disability retirement. Payable to dependent child under age 18 (23, if full-time student).
Guardian's Pension	Same as spouse's pension. Payable (along with child's pension) when no spouse is being paid and there is at least one child under 18 (23, if full-time student).

Vesting (Termination)

Vesting Service Requirement	Tier 1: 10 years of Credited Service.
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Tiers 2 & 3:
15 years of Credited Service.

Non-Vested Benefit

Tier 1:
Lump sum payment of accumulated contributions, plus additional amount based on years of Credited Service.

<u>Service</u>	<u>Additional % of Contributions</u>
Less than 5 years	0%
5 years	25%
6 years	40%
7 years	55%
8 years	70%
9 years	85%
10+ years	100%

Tiers 2 & 3:
Lump sum payment of accumulated contributions, with interest at rate determined by the Board.

Vested Benefit

Tier 1:
Deferred retirement annuity based on two times member's accumulated contributions, deferred to age 62. Member is not entitled to survivor benefits, benefit increases, or group health insurance subsidy.

Tiers 2 & 3:
Calculated same as normal retirement pension. Payable if contributions left in fund until reach age requirement. Member is entitled to survivor benefits, benefit increases, and group health insurance subsidy.

Cost-of-Living Adjustment

Payable to retired member or survivor of retired member

Tiers 1 & 2:
Compound cost-of-living adjustment on base benefit. First payment is made on July 1, 2018, with annual adjustments effective every July 1 thereafter.

Cost-of-living adjustment will be based on the average annual percentage change in the Metropolitan Phoenix-Mesa Consumer Price Index published by the United States Department of Labor, Bureau of Statistics. Maximum increase of 2%.

Tier 3:

Compound cost-of-living adjustment on base benefit beginning earlier of first calendar year after the 7th anniversary of retirement or when the retired member reaches 60 years of age.

A cost-of-living adjustment shall be paid on July 1 each year that the funded ratio for members hired on or after July 1, 2017 is 70% or more.

The cost-of-living adjustment will be based on the average annual percentage change in the Metropolitan Phoenix-Mesa Consumer Price Index published by the United States Department of Labor, Bureau of Statistics. The cost-of-living adjustment will not exceed:

- 2%, if funded ratio for members who are hired on or after July 1, 2017 is 90% or more;
- 1.5%, if funded ratio for members who are hired on or after July 1, 2017 is 80-90%;
- 1%, if funded ratio for members who are hired on or after July 1, 2017 is 70-80%.

Deferred Retirement Option Plan (DROP):

Eligibility	Tier 1 and 20 years of Credited Service.	
DROP Period	Maximum 60 months.	
Member Contributions	Cease upon DROP entry.	
Benefit Amount	Calculated based on Credited Service and average monthly compensation as of the beginning of the DROP period, credited to DROP participation account for DROP period.	
Interest on DROP Participation Account	<u>Beginning Year</u>	<u>Interest Rate</u>
	July 1, 2015	7.50%
	July 1, 2016	7.40%
	July 1, 2017	7.40%
	July 1, 2018	7.30%
	July 1, 2019	7.30%
Payment of DROP Participation Account	Payable as lump sum distribution to Public Safety Personnel Defined Contribution Retirement Plan at end of DROP period or at termination.	
Payment Monthly Benefit	System commences payment of benefit amount at the earlier of 1) the end of the DROP period and 2) at termination.	

Post-Retirement Health Insurance Subsidy

Eligibility Retired member or survivor who elect health coverage provided by the state or participating employer.

Maximum Subsidy Amounts (monthly)		<u>Member Only</u>	<u>With Dependents</u>
	Medicare Eligible	\$100	\$170
	One w/ Medicare	N/A	\$215
	Not Medicare Eligible	\$150	\$260

Employee Contributions

Members hired before July 20, 2011:

7.65%

Members hired on/after July 20, 2011, but before July 1, 2017:

11.65%. Amounts in excess of 7.65% are not used to reduce the employer contribution (“maintenance of effort”).

Tier 3:

50% of total contribution, which is Normal Cost plus a level-dollar amortization of unfunded actuarial accrued liability over a closed period not to exceed 10 years.

Employer Contributions

Tiers 1 & 2:

Normal Cost plus amortization of unfunded actuarial accrued liability over a closed period not to exceed 20 years (subject to one-time election to extend to closed period not to exceed 30 years). Contribution will never be less than 8% of payroll.

Tier 3:

50% of total contribution, which is Normal Cost plus a level-dollar amortization of unfunded actuarial accrued liability over a closed period not to exceed 10 years.

Changes to Benefit Provisions Since the Prior Valuation

None.

IX. ACTUARIAL FUNDING POLICY

The purpose of this Actuarial Funding Policy is to record the funding objectives and policy set by the Board for the Arizona Public Safety Personnel Retirement System (PSPRS). The Board establishes this Funding Policy to help ensure the systematic funding of future benefit payments for members of the Retirement System.

This funding policy was reviewed by the Board annually for several years following initial adoption until the 2017 experience study. Subsequently, it shall be reviewed every five years in conjunction with the experience study, although some adjustments may be warranted sooner to properly reflect Tier 3 benefits and changes to amortization methodology.

Funding Objectives

1. Maintain adequate assets so that current plan assets plus future contributions and investment earnings are sufficient to fund all benefits expected to be paid to members and their beneficiaries.
2. Maintain stability of employer contribution rates, consistent with other funding objectives.
3. Maintain public policy goals of accountability and transparency. Each policy element is clear in intent and effect, and each should allow an assessment of whether, how and when the funding requirements of the plan will be met.
4. Promote intergenerational equity. Each generation of members and employers should incur the cost of benefits for the employees who provides services to them, rather than deferring those costs to future members and employers.
5. Provide a reasonable margin for adverse experience to help offset risks.
6. Continue progress of systematic reduction of the Unfunded Actuarial Accrued Liability (UAAL).

Elements of Actuarial Funding Policy

1. Actuarial Cost Method

- a. The Entry Age Normal level percent of pay actuarial cost method of valuation shall be used in determining the Actuarial Accrued Liability (AAL) and Normal Cost. Differences in the past between assumed experience and actual experience (“actuarial gains and losses”) shall become part of the AAL. The Normal Cost shall be determined on an individual basis for each active member.

2. Asset Smoothing Method

- a. The investment gains or losses of each valuation period, resulting from the difference between the actual investment return and assumed investment return, shall be recognized annually in level amounts over seven years in calculating the Actuarial Value of Assets.
- b. The Actuarial Value of Assets so determined shall be subject to a 20% corridor relative to the Market Value of Assets.

3. Amortization Method

- a. The Actuarial Value of Assets are subtracted from the computed AAL. Any unfunded amount is amortized as a level percent of payroll over a closed period. If the Actuarial Value of Assets exceeds the AAL, the excess is amortized over an open period of 20 years and applied as a credit to reduce the Normal Cost otherwise payable.

4. Funding Target

- a. The targeted funded ratio shall be 100%.
- b. The maximum amortization period shall be 30 years.
- c. If the funding ratio is between 100% and 120%, a minimum contribution equal to the Normal Cost will be made.

5. Risk Management

- a. Assumption Changes
 - i. The actuarial assumptions used shall be those last adopted by the PSPRS Board based on the most recent experience study and upon the advice and recommendation of the actuary. In accordance with best practices, the actuary shall conduct an experience study every five years. The results of the study shall be the basis for the actuarial assumption changes recommended to the PSPRS Board.
 - ii. The actuarial assumptions can be updated during the five-year period if significant plan design changes or other significant events occur, as advised by the actuary.
- b. Amortization Method
 - i. The amortization method, Level Percent Closed, will ensure full payment of the UAAL over a finite, systematically decreasing period not to exceed 30 years. The amortization period will be reviewed once the period reaches 15 years.
- c. Risk Measures
 - i. The following risk measures will be annually determined to provide quantifiable measurements of risk and their movement over time.
 1. Classic measures currently determined
 - Funded ratio (assets / liability)
 2. UAAL / Total Payroll
 - Measures the risk associated with contribution decreases relative impact on the ability to fund the UAAL. An increase in this measure indicates an increase in contribution risk.
 3. Total Liability / Total Payroll
 - Measures the risk associated with the ability to respond to liability experience through adjustments in contributions. An increase in this measure indicates an increase in experience risk.

X. GLOSSARY

Actuarial Accrued Liability – Computed differently under different funding methods, the actuarial accrued liability generally represents the portion of the actuarial present value of benefits attributable to service credit earned (or accrued) as of the valuation date.

Actuarial Present Value of Benefits – Amount which, together with future interest, is expected to be sufficient to pay all benefits to be paid in the future, regardless of when earned, as determined by the application of a particular set of actuarial assumptions; equivalent to the actuarial accrued liability plus the present value of future normal costs attributable to the members.

Actuarial Assumptions – Assumptions as to the occurrence of future events affecting pension costs. These assumptions include rates of investment earnings, changes in salary, rates of mortality, withdrawal, disablement, and retirement as well as statistics related to marriage and family composition.

Actuarial Cost Method – A method of determining the portion of the cost of a pension plan to be allocated to each year; sometimes referred to as the "actuarial funding method." Each cost method allocates a certain portion of the actuarial present value of benefits between the actuarial accrued liability and future normal costs.

Actuarial Equivalence – Series of payments with equal actuarial present values on a given date when valued using the same set of actuarial assumptions.

Actuarial Present Value - The amount of funds required as of a specified date to provide a payment or series of payments in the future. It is determined by discounting future payments at predetermined rates of interest, and by probabilities of payments between the specified date and the expected date of payment.

Actuarial Value of Assets – The value of cash, investments, and other property belonging to the pension plan as used by the actuary for the purpose of the actuarial valuation. This may correspond to market value of assets, or some modification using an asset valuation method to reduce the volatility of asset values.

Asset Gain (Loss) – That portion of the actuarial gain attributable to investment performance above (below) the expected rate of return in the actuarial assumptions.

Amortization – Paying off an interest-discounted amount with periodic payments of interest and (generally) principal, as opposed to paying off with a lump sum payment.

Amortization Payment – That portion of the pension plan contribution designated to pay interest and reduce the outstanding principal balance of unfunded actuarial accrued liability. If the amortization payment is less than the accrued interest on the unfunded actuarial accrued liability the outstanding principal balance will increase.

Assumed Earnings Rate – The interest rate used in developing present values to reflect the time value of money.

Decrements – Events which result in the termination of membership in the system such as retirement, disability, withdrawal, or death.

Entry Age Normal (EAN) Funding Method – A standard actuarial funding method whereby each member's normal costs (service costs) are generally level as a percentage of pay from entry age until retirement. The annual cost of benefits is comprised of the normal cost plus an amortization payment to reduce the UAL.

Experience Gain (Loss) – The difference between actual unfunded actuarial accrued liabilities and anticipated unfunded actuarial accrued liabilities during the period between two valuation dates. It is a measurement of the difference between actual and expected experience, and may be related to investment earnings above (or below) those expected or changes in the liability due to fewer (or greater) than expected numbers of retirements, deaths, disabilities, or withdrawals, or variances in pay increases relative to assumed pay increases. The effect of such gains (or losses) is to decrease (or increase) future costs.

Funded Ratio – A measure of the ratio of the actuarial value of assets to liabilities of the system. Typically, the assets used in the measure are the actuarial value of assets as determined by the asset valuation method. The funded ratio depends not only on the financial strength of the plan but also on the asset valuation method used to determine the assets and on the funding method used to determine the liabilities.

Market Value of Assets (MVA) – The value of assets as they would trade on an open market.

Normal Cost – Computed differently under different funding methods, generally that portion of the actuarial present value of benefits allocated to the current plan year.

Unfunded Actuarial Accrued Liability (UAAL) – The excess of the actuarial accrued liability over the valuation assets; sometimes referred to as "unfunded past service liability". UAL increases each time an actuarial loss occurs and when new benefits are added without being fully funded initially and decreases when actuarial gains occur.

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EXECUTIVE SUMMARY

Item Name: **Sunset Review of Fees for CY 2020 (ASU)**

 Action Item

Requested Action: Arizona State University (ASU) asks the board to approve the sunset review of fees for CY 2020, as described in this executive summary.

Background/History of Previous Board Action

- During the 2018 legislative session, legislation passed (Laws 2018, Chapter 107) that amends A.R.S. § 15-1626 requiring the board to broaden its approval of fees to approve via a roll call vote any changes to academic fees or online program tuition rates.
- In January 2018, the Arizona Auditor General issued its audit of the Universities Fee-Setting Processes. The Auditor General's audit concluded that ABOR and the universities have established fee-setting processes consistent with best practices but could further enhance the process. For example, the audit found that ABOR should review its fee-setting policies and guidance to require a periodic review of the universities' fee-setting processes.
- At its November 14 – 16, 2018 meeting, the board approved a new section of policy that requires a sunset review process. ABOR Policy 4-105(F) now requires the board to review and approve each academic fee at least once every 10 years based on a plan developed and implemented by each university.
 - As a transition to this new sunset review process, ABOR Policy 4-105(G) requires the board to approve by July 1, 2019 the universities' plans to review each of their existing academic fees over the next 10 years, which the board approved at its June 12 – 14, 2019 meeting.

Discussion

- At its June 12 – 14, 2019 meeting, the board approved ASU to review three fees in CY 2020.
- Each university is required to report the academic fees reviewed in CY 2020 along with the result of the review and recommendation on the continuation of the fees. Pursuant to ABOR Policy 4-105(F)(2), this report is due the same time as the materials for setting tuition and fees.
- Three ASU fees were reviewed as a part of this first Sunset Review. Each of the

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responsible academic or administrative units submitted a report that addressed the purpose, enrollment, fee revenue, and fund balance. As well, each unit was asked to recommend whether the fee should be continued as approved, changed, or disestablished.

- The following table summarizes the total number of fees that the university reviewed in CY 2020, including the academic fees that were unchanged and the class fees that were decreased and eliminated. The next two bullet points and tables provide more detailed information.

Total Fees Reviewed			
<u># of Academic Fees Unchanged</u>	<u># of Class Fees Decreased</u>	<u># of Class Fees Eliminated</u>	<u># of Total Fees Reviewed</u>
3	0	242	245

- The first table in the attachment individually identifies each academic fee that was reviewed in CY 2020. The following table summarizes this information.

Academic Fees				
<u># of Fees Reviewed</u>	<u>Range of Fee Amounts</u>	<u>FY20 Total Enrollment</u>	<u>FY20 Total Fee Revenue</u>	<u># of Fees Unchanged</u>
3	\$50 - \$300	18,136	\$4,851,125	3

- ABOR Policy 4-105(C)(6) allows a university president to reduce or eliminate a class fee without board approval, and 4-105(F)(2) requires each university to include in this report a list of class fees that have been decreased or eliminated in CY 2020. The second table in the attachment individually identifies these class fees. The following table summarizes this information.

Class Fees	
<u># of Fees Decreased</u>	<u># of Fees Eliminated</u>
0	242

Committee Review and Recommendation

The Finance, Capital and Resources Committee reviewed and discussed this item at its April 8, 2021 Tuition Workshop meeting.

Statutory/Policy Requirements

- ABOR Policy 4-105 Fees

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Item Name: **Sunset Review of Fees for CY 2020 (NAU)**

Action Item

Requested Action: Northern Arizona University (NAU) asks the board to approve the sunset review of fees for CY 2020, as described in this executive summary.

Background/History of Previous Board Action

- During the 2018 legislative session, legislation passed (Laws 2018, Chapter 107) that amends A.R.S. § 15-1626 requiring the board to broaden its approval of fees to approve via a roll call vote any changes to academic fees or online program tuition rates.
- In January 2018, the Arizona Auditor General issued its audit of the Universities Fee-Setting Processes. The Auditor General's audit concluded that ABOR and the universities have established fee-setting processes consistent with best practices but could further enhance the process. For example, the audit found that ABOR should review its fee-setting policies and guidance to require a periodic review of the universities' fee-setting processes.
- At its November 14 – 16, 2018 meeting, the board approved a new section of policy that requires a sunset review process. ABOR Policy 4-105(F) now requires the board to review and approve each academic fee at least once every 10 years based on a plan developed and implemented by each university.
 - As a transition to this new sunset review process, ABOR Policy 4-105(G) requires the board to approve by July 1, 2019 the universities' plans to review each of their existing academic fees over the next 10 years, which the board approved at its June 12 – 14, 2019 meeting.

Discussion

- At its June 12 – 14, 2019 meeting, the board approved NAU to review at least one third of all fees (approximately 250) during the first calendar year. NAU had originally planned on beginning this 3-year review cycle in 2022, which they began early during the summer of 2020.

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- Each university is required to report the academic fees reviewed in CY 2020 along with the result of the review and recommendation on the continuation of the fees. Pursuant to ABOR Policy 4-105(F)(2), this report is due the same time as the materials for setting tuition and fees.
- NAU implemented a course fee documentation and tracking system in CY 2020 requiring a full internal review and resubmission of all existing course fees. Departments updated expense inventories and documentation; units completed internal reviews; University offices including IT, Comptroller and Academic Affairs Operations validated submissions with University Administration providing a final review and final decision.
- The following table summarizes the total number of fees that the university reviewed in CY 2020, including the academic fees that were unchanged and the class fees that were decreased and eliminated. The next two bullet points and tables provide more detailed information.

Total Fees Reviewed			
<u># of Academic Fees Unchanged</u>	<u># of Class Fees Decreased</u>	<u># of Class Fees Eliminated</u>	<u># of Total Fees Reviewed</u>
137	126	219	480

- The first table in the attachment individually identifies each academic fee that was reviewed in CY 2020. The following table summarizes this information.

Academic Fees				
<u># of Fees Reviewed</u>	<u>Range of Fee Amounts</u>	<u>FY20 Total Enrollment</u>	<u>FY20 Total Fee Revenue</u>	<u># of Fees Unchanged</u>
137	\$5 - \$400	29,569	\$2.0 million	137

- ABOR Policy 4-105(C)(6) allows a university president to reduce or eliminate a class fee without board approval, and 4-105(F)(2) requires each university to include in this report a list of class fees that have been decreased or eliminated in CY 2020. The second table in the attachment individually identifies these class fees. The following table summarizes this information.

Class Fees	
<u># of Fees Decreased</u>	<u># of Fees Eliminated</u>
126	219

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Committee Review and Recommendation

The Finance, Capital and Resources Committee reviewed and discussed this item at its April 8, 2021 Tuition Workshop meeting.

Statutory/Policy Requirements

- ABOR Policy 4-105 Fees

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EXECUTIVE SUMMARY

Item Name: Report on the Academic Affairs and Educational Attainment Committee Meeting

Action Item

Requested Action: The board office asks the board to review the report of the April 1, 2021 Academic Affairs and Educational Attainment Committee.

Agenda Highlights
Academic Affairs and Educational Attainment Committee
April 1, 2021

1. Update on Department of Education

The committee received an update from Arizona Superintendent of Public Instruction, Kathy Hoffman.

2. University of Arizona's Proposal to Provide a Novel Degree Program within Arizona by Extending its Bachelor of General Studies at the University's Existing Sites to Chandler, Arizona

The committee was asked to make a recommendation to the board to approve, reject or modify the proposed novel combination of degree and location for the University of Arizona's existing sites to Chandler, Arizona.

Outcomes and Assignments:

The committee recommended that the board approve UArizona's request to extend its Bachelor of General Studies at the university's existing site to Chandler, Arizona.

Regents requested additional information on UArizona's plans for expansion to Maricopa County.

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3. Discussion of Arizona State University's Institutional University Metrics

The committee engaged in a discussion regarding proposed Institutional University Metrics for Arizona State University.

Outcomes and Assignments:

Regents requested additional follow-up and possible revisions on various proposed institutional metrics and definitions in anticipation of the May committee meeting discussion.

4. Discussion of Arizona State University's Annual Enterprise-wide Metric Targets

The committee continued its discussion with Arizona State University regarding the institution's proposed annual Enterprise-wide Metric Targets and Forecast Measures.

Outcomes and Assignments:

Regents requested additional follow-up and possible revisions on various proposed metrics targets in anticipation of the May committee meeting discussion.

5. Discussion of the University of Arizona's Institutional University Metrics

The committee engaged in a discussion with the University of Arizona regarding proposed institutional university metrics.

Outcomes and Assignments:

Regents requested additional follow-up and possible revisions on various proposed institutional metrics and definitions in anticipation of the May committee meeting discussion.

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6. Discussion of the University of Arizona's Annual Enterprise-wide Metric Targets

The committee discussed the University of Arizona's proposed annual Enterprise-wide Metric Targets and Forecast Measures.

Outcomes and Assignments:

Regents requested additional follow-up and possible revisions on various proposed metrics targets in anticipation of the May committee meeting discussion.

7. First-Time Student Retention Report

The committee will engage in a discussion with the universities on First-Time Student Retention.

Outcomes and Assignments:

In the interest of time, Chair Manson tabled this item to be discussed at the board meeting.

8. Request for New Academic Unit for Arizona State University

The committee reviewed Arizona State University's proposed new academic unit implementation in the 2021-2022 academic year.

Outcomes and Assignments:

The committee recommended that the board approve the proposed new academic unit for Arizona State University.

9. Request for New Organizational Unit for Northern Arizona University

The committee reviewed and discussed Northern Arizona University's proposed new organizational unit for implementation in the summer of 2021.

Outcomes and Assignments:

The committee recommended that the board approve the proposed new organizational unit for Northern Arizona University.

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10. Request for New Academic Programs for the University of Arizona

The committee reviewed and discussed the University of Arizona proposed new undergraduate programs for implementation in the 2021-2022 academic year.

Outcomes and Assignments:

The committee recommended that the board approve the proposed new academic program requests for the University of Arizona.

11. Proposed Revision to ABOR Policy 2-325 “Arizona Teacher’s Academy” (First Reading and Immediate Implementation)

The committee reviewed the request for the proposed revision to ABOR Policy 2-325 “Arizona Teacher’s Academy”.

Outcomes and Assignments:

The committee recommended forwarding to the full board for first reading and immediate implementation the proposed revisions to ABOR Policy 2-325.

12. Proposed Revisions to ABOR Policies 4-201 “Definitions for Residency Classifications”, 4-203 “Requirements to be Considered in Determining an Individual’s Residency Classification for Tuition Purposes”, 4-205 “Residency Classification Appeal Procedures” and Repeal of 4-206 “Miscellaneous Provisions” (First Reading)

The board office asked the committee to review and forward to the full board on first reading the proposed revisions to ABOR Policies 4-201 “Definitions for Residency Classifications”, 4-203 “Requirements to be Considered in Determining an Individual’s Residency Classification for Tuition Purposes”, 4-205 “Residency Classification Appeal Procedures” and Repeal of 4-206 “Miscellaneous Provisions”.

Outcomes and Assignments:

The committee recommended forwarding to the full board for first reading and immediate implementation the proposed revisions the proposed revisions to ABOR Policies 4-201 “Definitions for Residency Classifications”, 4-203 “Requirements to be Considered in Determining an Individual’s Residency Classification for Tuition Purposes”, 4-205 “Residency Classification Appeal Procedures” and Repeal of 4-206 “Miscellaneous Provisions”.

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Item Name: Proposed Revisions to ABOR Policy 2-325 “Arizona Teachers Academy” (Second Reading)

Action Item

Requested Action: The board office asks the board to approve on second reading the proposed revisions to ABOR Policy 2-325 “Arizona Teachers Academy” to process emergency requests.

Background/History of Previous Board Action

For each academic year that a student receives a scholarship for being in the Arizona Teachers academy, the student must teach for one full school year in a public school in Arizona after graduation from the Arizona teachers academy. If the student fails to complete that service requirement, the student shall reimburse the Arizona board of regents for the total amount of the scholarship for tuition and fees the student received for that year.

A.R.S. §15-1655(D)(6) requires the board to establish a process for deferring service or repayment based on factors as adopted by the board. Current ABOR Policy 2-325 only allows for waivers for temporary disability, armed service, or education, but there is no waiver for extraordinary circumstances beyond the control of the student in policy.

The board adopted the proposed policy revision on first reading for immediate implementation at the February 10-12, 2021 board meeting.

On March 8, 2021, the Arizona Governor signed [HB 2832](#), correcting an unrelated conflict between SB 1492 and Proposition 208 as to the Teachers Academy. HB 2832 was enacted as an emergency measure effective January 1, 2021.

To comply with HB 2832, Policy 2-325 will be substantially amended through a separate agenda item, Item #24, which is included on this April 14-16, 2021 board agenda for first reading and immediate implementation. The revisions will include the waiver language reflected in this revision.

Discussion

The board has received requests to temporarily delay the service commitment for significant factors outside of the student’s control. Under the current policy, the board’s

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process cannot grant these requests, but there are extraordinary circumstances that would warrant a temporary delay of fulfilling the service commitment.

The board office requests that the board approve the proposed policy revision on second reading.

Committee Review and Recommendation

Given the immediate effective date, this has not appeared before a committee for review. However, the board adopted this proposed policy revision on first reading for immediate implementation at the February 10-12, 2021 board meeting.

Statutory/Policy Requirements

A.R.S. §15-1655

A.R.S. §15-1626

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2-325 Arizona Teachers Academy

- A. Eligible postsecondary institutions as defined in this policy shall implement the Arizona Teachers Academy and provide scholarships to eligible students enrolled in the Arizona Teachers Academy who commit to teaching in an Arizona public school as further defined in this policy.
- B. In implementation of the Arizona Teachers Academy, eligible postsecondary institutions may develop and offer innovative teacher preparation programs that target candidates outside of traditional education degree pathways and include executive and non-degree programs leading to professional teacher certification.
- C. Eligible Postsecondary Institutions
 - 1. Eligible postsecondary institutions include universities under the jurisdiction of the board and Arizona community colleges that offer post-baccalaureate programs that lead to certification and have entered into an agreement with the board relative to these programs.
 - 2. The board shall execute agreements with the Arizona community colleges that qualify as eligible postsecondary institutions prior to making disbursements for costs associated with the Arizona Teachers Academy to those community colleges.
- D. Tuition and Fee Scholarships
 - 1. Each year by July 1, board staff shall notify eligible postsecondary institutions of the number of scholarship slots allocated to the institution for the upcoming fiscal year.
 - 2. Scholarship slot allocations shall be based on prior year enrollment in the Arizona Teachers Academy at the participating institutions and subject to legislative appropriations to the Arizona Teachers Academy fund.
 - 3. Tuition scholarships are last dollar scholarships that cover the cost of tuition and mandatory fees after all other gift aid is received.
 - 4. Scholarship monies that are in excess of the balance between tuition and fees and gift aid can be reallocated within the program at each eligible postsecondary institution to support costs

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associated with the Arizona Teachers Academy.

E. Student Eligibility

1. Prior to receiving a tuition scholarship, induction services or a national board certification scholarship, a student must sign a student agreement that requires the student to meet the eligibility requirements for the Arizona Teachers Academy and specifies the terms of continuing eligibility, the post-graduation or post-certification service obligations and the student's repayment obligations due to failure to meet the eligibility requirements or service obligations.
2. To be eligible for a tuition waiver scholarship, students must meet the following criteria:
 - a. Be admitted and enrolled in the Arizona Teachers Academy as an undergraduate or graduate university student or as a post-baccalaureate student at a community college or university.
 - b. File a free application for federal student aid (FAFSA) each year enrolled in the Arizona Teachers Academy and accept all federal, state, institutional, and private grants and scholarships awarded prior to the tuition waiver scholarship being applied to outstanding tuition and fees associated with the Arizona Teachers Academy program of study.
3. To be eligible for induction services a teacher must be a graduate of the Arizona Teachers Academy and in his or her first year of employment as a teacher in an Arizona public school.
4. To be eligible for a National Board Certification scholarship, a teacher must be currently employed in an Arizona public school and seeking National Board Certification through an approved provider as identified by the executive director.

F. Distributing Monies in The Arizona Teachers Academy Fund Between Eligible Postsecondary Institutions

1. Eligible postsecondary institutions shall provide to the executive director or the executive director's designee, actual full time equivalent enrollment in academy programs, and other documents

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as requested.

2. The executive director shall make distributions based on the reported actual full time equivalent enrollment appropriately prorated for the applicable academic period.
3. The executive director may reallocate unused scholarship slots among the eligible postsecondary institutions.
4. The executive director shall make a second distribution in the spring semester based on the reallocated scholarship slots.
5. The executive director shall reimburse eligible postsecondary institutions for inductions services offered in the first year after completion of the Arizona Teachers Academy program. Payments shall be made with the fall semester scholarship reimbursement payment.
6. The executive director shall distribute monies for National Board Certification to institutions that have entered into an agreement with the board to offer scholarships to Arizona teachers seeking National Board Certification.

G. Support for National Board Certification

1. The executive director shall identify eligible postsecondary institutions that provide support for National Board Certification.
2. Each eligible postsecondary institution that enters into an agreement with the board for this function shall provide a one-time scholarship to teachers currently employed in an Arizona public school seeking National Board Certification to support the fees associated with certification.
3. The number of scholarships approved by the board shall be in accordance with the annual academy budget base on the amount of legislative appropriations.

H. Coordinating Induction Services

1. Eligible postsecondary institutions shall provide induction services to academy graduates during the first year of teaching immediately following completion of the academy. Induction services are only

EXECUTIVE SUMMARY

provided in the first year if the graduate is in the process of meeting his or her service obligations within the required timeframe. Institutions are not required to provide induction services to students who have not met the service obligation.

2. Monies for induction will be based on the number of academy graduates that completed in the prior fiscal year.
3. Monies for induction services will be distributed with scholarship slot reimbursement payment.
4. Institutions may be required to report to the board regarding the induction services provided.

I. Compliance With Arizona Teachers Academy Program and Service Obligations and Conditions of Repayment

1. Prior to receipt of funds a student shall enter into a written agreement, which shall set forth the terms of repayment of funds in the event the recipient does not satisfy the teaching or program obligations.
2. Students who do not successfully complete the academic year in good academic standing or who cease to be enrolled in the Arizona Teachers Academy shall reimburse the board for the total amount of funding received for that year.
3. The executive director or the executive director's designee shall monitor Arizona Teachers Academy graduates' progress toward meeting their teaching obligations.
4. Recipients will have a grace period of 12 months after graduation, or completion of an approved course of study leading to a teaching credential, to sign a teaching contract in an Arizona public school.
5. If the recipient has not secured employment in an Arizona public school, the repayment shall begin at the end of the 12 month grace period.
6. Students who do not fulfill their obligation to teach in an Arizona public school shall reimburse the board for the proportional amount of the scholarship for tuition and fees that the student received that corresponds to the number of school years the student agreed to

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teach but did not teach.

7. The board staff shall provide to each person in repayment an amortization schedule. There shall be no interest charged and the repayment duration shall be no more than 10 years.

J. Deferment of the Service Obligation

1. The executive director or the executive director's designeeS, upon written request of a recipient, may grant deferment of time for satisfying the teaching commitment if the recipient:

- a. Is temporarily totally disabled for a period not to exceed 3 years, as established by a sworn affidavit from a qualified physician, or

- b. Is called to active duty in the armed forces of the United States, or

- C.** Is enrolled, registered and progressing toward timely degree completion in a full time master's degree program that would delay required full-time teaching requirement to one year following completion of the master's degree program or two years post-bachelor's degree, whichever is less, OR

- D. e** IS UNABLE TO FULFILL THEIR TEACHING COMMITMENT DUE TO EXTRAORDINARY CIRCUMSTANCES BEYOND THEIR CONTROL.

2. In each case, the recipient must provide complete and verifiable documentation to support the request.

K. Cancellation of Service Obligation

1. The executive director or the executive director's designee, may cancel the service obligation made under this program if it determines that:

- a. The recipient is totally and permanently disabled. The executive director or the executive director's designee shall require a sworn and verified affidavit from a qualified physician, which supports the request.

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- b. The recipient has died. The executive director or the executive director's designee shall require a certified copy of the death certificate.

- L. Data Collection and Reporting
 - 1. Each eligible postsecondary institution shall provide to the board by July 15 of each year information as requested by board staff to meet the board's reporting requirements under A.R.S. § 15-1655(i).
 - 2. Each eligible postsecondary institution shall provide to the board by January 15 of each year information as requested by board staff to meet the board's reporting requirements under A.R.S. § 15-1655(j).

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Item Name: University of Arizona's Proposal to Provide a Novel Degree Program within Arizona by Extending its Bachelor of General Studies at the University's Existing Sites to Chandler, Arizona

Action Item

Requested Action: The University of Arizona asks the board to approve its Bachelors of General Studies at the university's existing site in Chandler, AZ.

Background

From time to time, a university may desire to extend an existing degree program at one Arizona location to another existing Arizona location. However, prior to publicly announcing, marketing or delivering this novel combination of an existing degree in a new location within Arizona the university must provide notice to, and consult with, the other Arizona public universities.

This notice and consultation process is governed by the board's recently revised Academic Locations, Programs and Organizational Units Policy – ABOR Policy 2-223.

After receiving proper notice of the proposing university's intent, the other universities have 7 calendar days to respond in writing with any objections to the proposal. If the other universities do not provide any written objection to the proposal within 7 days, the proposing university may immediately begin to publicly announce, market, solicit applications for, and deliver the program.

If another university objects, the proposing university must make a good faith effort to address the concerns detailed in the written objection.

Upon receiving an objection, board staff places the proposal on the next regularly scheduled Academic Affairs and Educational Attainment Committee agenda and the committee is expected to take-up the proposal and make a recommendation to the board to approve, reject or modify the novel combination of degree and location.

Upon receiving the committee's recommendation, the board will vote on the proposal at a regularly scheduled board meeting.

Proposal and Objection

On Wednesday March 17, 2021, UArizona notified ASU and NAU of its intent to extend

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its Bachelor's of General Studies (BGS) degree currently being offered in Tucson, through Arizona Online and its North Valley location in Phoenix to various other locations around Arizona including Chandler, Douglas, Nogales, Sierra Vista, and Yuma. Additional information about UArizona's BGS degree can be found in the attached original new program request approved by the board in 2011. (Exhibit 1)

On Friday, March 19, 2021, ASU objected to UArizona offering its BGS at its Chandler location. NAU did not object.

When asked for the rationale for its objection, ASU responded that its objection is rooted in a lack of understanding about what UArizona is planning for the Chandler site. Specifically, ASU explained that it was interested to understand the overall plan for the Chandler site and was less concerned about the specific degree program proposed.

UArizona has responded to ASU's objection by explaining, among other things, that the BGS program is a collaborative program supported by all the Colleges of the University to provide students from diverse backgrounds and with broad goals a path towards graduation. As such, it is an important driver of improved completion outcomes for UArizona.

UArizona also explained that its Chandler facility is a small facility, located within the Chandler Community Center. At full scale, the BGS is expected to have an enrollment of 25 students at the Chandler location, in addition to the current roughly 120 students enrolled through the Chandler location.

UArizona also noted that most, if not all, BGS students will have started their degrees on the university's Tucson campus, and will be enrolled through Chandler to facilitate the completion of their degrees.

Committee Review and Recommendation

The Academic Affairs and Educational Attainment Committee reviewed this item at its April 1, 2021 meeting, and recommended forwarding the item to the full board for approval.

Statutory/Policy Requirements

A.R.S. 15-1626(B) "General Administrative Powers and Duties of the Board"

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Exhibit #1

Arizona Implementation - Unique Program

**UNIVERSITY SYSTEM
CHIEF ACADEMIC OFFICERS GUIDELINES
FOR
REQUESTS FOR IMPLEMENTATION AUTHORIZATION
FOR NEW ACADEMIC DEGREE PROGRAM**

I. PROGRAM NAME AND DESCRIPTION AND CIP CODE*

A. DEGREE(S), DEPARTMENT AND COLLEGE AND CIP CODE

Bachelor of General Studies, Colleges of Letters, Arts and Science
CIP Code: 30.000 – Multi-/Interdisciplinary Studies, General

B. PURPOSE AND NATURE OF PROGRAM

The Colleges of Letters, Arts and Science (CLAS) Bachelor's Degree in General Studies (BGS) is an alternative to the University of Arizona's BA and BS degrees. Notably, while it would become the University's newest degree, the BGS is in fact modeled after a centuries-old tradition of scholarship that aims to provide students with a liberal arts and sciences education, broad enough to make one both an outstanding citizen and a lifelong lover of learning. The degree is intended to be highly multidisciplinary, with increasing degrees of rigor as students progress from university-wide General Education courses, through a set of 9 courses that are selected from three of six possible concentrations, into a set of 12 generally upper-division courses within a single concentration.

C. PROGRAM REQUIREMENTS

The BGS curriculum embraces a multidisciplinary (rather than interdisciplinary) approach to the curriculum. The program of study provides a structure of flexible pathways for obtaining a degree with a broad academic reach. The program is purposeful, procedurally well crafted, and pedagogically responsible. It establishes the necessary evaluative structures for a degree of this type. The curriculum embraces a three-tiered approach beginning with General Education as the first tier, the major requirements as the second, and the focus concentration as the third.

Because of the multidisciplinary nature of the degree, the curriculum does not permit a minor. The range of departments/courses within each

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concentration reflects the diversity in course work that would normally be achieved by a minor within a traditional discipline-based degree. The number of units required for the major (63) would also make it very difficult for student to complete a minor with different courses outside of those within the selected concentrations. From start to finish, the BGS Degree requires 120 hours, including:

General Education*

English	6 units
Math	3 units
Tier I	18 units
Tier II	12 units**
1 st and 2 nd semester language (or equivalent proficiency)	8-10 units***

*units include the Gender, Race, Class, Ethnicity, Sexual Orientation, or Non-Western Studies requirement

**Up to 6 units of Tier Two courses may also apply toward the 27-units needed in the "major requirements" section described below.

***The number of units will vary depending on the language studied.

Total Units in General Education **47-49 units**

General Studies (GS) Major *

Basic Major Requirements 27 units
Students must select at least three courses from three of the six concentrations.

Focus Concentration 36 units
In addition to fulfilling the basic major requirements, students select 36 units of coursework from one concentration. This units may come either from one of the three concentrations selected in the major requirement or from a fourth concentration.

BGS students have the option of completing a capstone experience (e.g. a capstone project or an internship) for 1 – 3 units within the 36 focus concentration units.

Total Units in the GS Major **63 units**

* At least 36 units in the major must be upper-division courses.

General Electives **8-10 units***

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*depending on number of language units from General Education

Total Number of Units Required

120

Other Requirements

A 2.0 GPA in the GS major is required.

At least 42 units out of the 120 units must be upper-division courses.

D. CURRENT COURSES AND EXISTING PROGRAMS

The six focus concentrations reflect groupings of departments/majors from across the CLAS Colleges and the other Colleges at the University. Requiring that students select three courses from three concentrations reflects the multidisciplinary approach to the degree. This requirement also establishes a sound and consistent foundation upon which students' more advanced course work in one concentration can be built. The six concentrations are:

- Social Behavior and Human Understanding
- Arts, Media and Entertainment
- Study of the American Experience
- Science, Technology, Health and Society
- Economy and Industry
- Global and Intercultural Understanding

The six concentrations, student outcomes, and selected departments/majors for each concentration are described in more detail in an appendix to this proposal. Appropriate courses have been suggested by department faculty and are subject to change with the evolution of the BGS degree, the concentrations and student outcomes. The suggested courses will be vetted by a faculty Executive Committee (described further below) to be sure they are appropriate for each concentration. The Executive Committee will also be responsible for designating various curricular paths that would assist students in choosing a coherent set of courses, particularly within their focus concentration. Within each concentration a wide range of courses will be available. Alternative courses may at times be substituted in a given concentration; the Director of the Executive Committee will have signatory authority for such exceptions.

E. NEW COURSES NEEDED

No new courses are needed for this degree program.

F. REQUIREMENTS FOR ACCREDITATION

N.A.

EXECUTIVE SUMMARY

II. STUDENT LEARNING OUTCOMES AND ASSESSMENT

A. What are the intended student outcomes, describing what students should know, understand, and/or be able to do at the conclusion of this program of study?

1. Graduates of the BGS Degree must demonstrate an understanding of the relationship between multiple disciplines of study.
2. Graduates of the BGS Degree are expected to know and understand what it means to be an educated citizen and responsible member of global society.
3. Graduates of the BGS Degree must demonstrate the ability to communicate ideas through a variety of different media – oral, written, visual.
4. Graduates of the BGS Degree must demonstrate the key knowledge and understandings as specified within the selected focus concentration.

B. Provide a plan for assessing intended student outcomes.

Assessment Tools and Projected Findings will include student surveys, surveys of coursework in concentrations and average grades.

III. STATE'S NEED FOR THE PROGRAM

A. HOW DOES THIS PROGRAM FULFILL THE NEEDS OF THE STATE OF ARIZONA AND THE REGION?

The BGS degree is designed to serve a specific population at the University of Arizona and beyond. Target populations include:

- Students who wish a multidisciplinary degree rather than a single-discipline degree or an interdisciplinary degree.
- Transfer students who enter without a major, especially non-traditional students who have completed general education courses and/or associate degrees.
- Students who began as pre-majors in a particular area but have been unable to gain admission to their desired degree program.
- Students who have not declared a major but are close to, or over the 60 units/time to declare a major policy.

B. IS THERE SUFFICIENT STUDENT DEMAND FOR THE PROGRAM?

EXECUTIVE SUMMARY

1. What is the anticipated student enrollment for this program?
 (Please utilize the following tabular format).

5-YEAR PROJECTED ANNUAL ENROLLMENT					
	1 st yr.	2 nd yr.	3 rd yr.	4 th yr.	5 th yr.
No. Student Majors	200	400	600	800	1000

2. What is the local, regional and national need for this program? Provide evidence of the need for this program. Include an assessment of the employment opportunities for graduates of the program during the next three years.

This degree program provides a pathway towards a college degree for a population of students that may not find a traditional major the most appropriate route for them. We anticipate that having a Bachelors of General Studies degree will enhance graduates' employment possibilities. Building from General Education coursework up to upper-division coursework in a particular concentration will make graduates more competitive in the job market with employers who do not require expertise in a particular discipline but nonetheless want to hire college graduates who are proficient in various modes of communication, critical thinking, and analytic skills.

3. Beginning with the first year in which degrees will be awarded, what is the anticipated number of degrees that will be awarded each year for the first five years? (Please utilize the following tabular format).

PROJECTED DEGREES AWARDED ANNUALLY					
	1 st Year	2 nd Year	3 rd Year	4 th Year	5 th Year
No. Degrees	50	100	150	200	250

IV. APPROPRIATENESS FOR THE UNIVERSITY

EXECUTIVE SUMMARY

The mission of the University of Arizona is to provide a comprehensive, high-quality education that engages our students in discovery through research and broad-based scholarship. The BGS degree meets the second part of the mission by providing an alternative to traditional BA/BS degrees. The degree has in mind students who have wide-ranging academic interests and do not wish to focus their studies on one particular discipline.

V. EXISTING PROGRAMS AT OTHER CAMPUSES

Arizona State University has a Bachelor of General Studies degree.

A. EXISTING PROGRAMS IN ARIZONA --

1. While ASU offers a Bachelor of General Studies degree, it is only offered at the downtown campus and is structured differently than the one proposed for The University of Arizona. The ASU degree is organized into eighteen “clusters” Students choose four (4) clusters and at least three (3) classes within each one. The UA BGS degree as described in this proposal contains six concentrations, and students must complete a total of 36 units in one concentration. In addition, the UA BGS degree would require 47-49 hours of general education coursework and 36 upper division units in the major, while the ASU degree requires 35 hours of general education coursework and 21 upper division units in the major (i.e., there are more electives allowed in the ASU degree).
2. Other Institutions – To our knowledge, this program is not offered at the same academic level by private institutions in the state of Arizona.

B. PROGRAMS OFFERED IN OTHER WICHE STATES

Other than ASU’s BGS program, we have not aware of a similar program offered at institutions in other WICHE states.

VI. EXPECTED FACULTY AND RESOURCE REQUIREMENTS

A. FACULTY

Faculty oversight: The BGS Degree will be overseen by a faculty Executive Committee comprised of seven faculty members (the Director, and one faculty member representing each concentration) and the director of the Center for Exploratory Studies. The BGS Executive Committee will serve as the curriculum committee for the degree and mentors to the professional advisors working with the program. The committee will also provide support for grade appeals and

EXECUTIVE SUMMARY

academic integrity cases. Periodically, the committee will assess the degree's general structure and measure its success.

Role of the Director: The Director of the Executive Committee will oversee the work of the committee through both the initial development of the program and its implementation. This work will include vetting the lists of courses that have been proposed by departments, designating curricular paths for students in the program, overseeing the production of materials describing the program, and ensuring that advisors are ready to work with students. As the program is implemented, advisors will need to be mentored on how to help students make course decisions.

Individual courses within the concentrations will be taught by current faculty already teaching those courses. No additional faculty will be needed.

Faculty members who have agreed to serve on the Executive Committee are:

Director: Bobbi McKean; Theater, Film, & Television
Social Behavior and Human Understanding: Christopher Maloney; Philosophy

Arts, Media and Entertainment: Emily Umberger; Art (and Latin American Studies)

Study of the American Experience: TBA

Science, Technology, Health and Society: Elliot Cheu; Physics

Economy and Industry: TBA; Eller College of Management

Global and Intercultural Understanding: Linda Waugh; French & Italian (also English, Anthropology, and Second Language Acquisition & Teaching)

1. Additional Faculty

N.A.

2. Current FTE Students and Faculty

N.A.

3. Projected FTE Students and Faculty

N.A.

B. LIBRARY

EXECUTIVE SUMMARY

1. Current Relevant Holdings

Current library holdings are adequate for this program.

2. Additional Acquisitions Needed

No additional library holdings will be needed for this program.

C. PHYSICAL FACILITIES AND EQUIPMENT

1. Existing Physical Facilities

The BGS degree program will be housed largely in the Center for Exploratory Studies (CES) in Old Main Building on the main campus.

2. Additional Facilities Required or Anticipated

We do not anticipate needing additional physical facilities and equipment.

D. OTHER SUPPORT

1. Other Support Now Available

Professional advisors in the Center for Exploratory Students (CES) are already in place to assist students and are used to working with the student populations most likely to find this degree appealing. CES will work in close collaboration with the BGS Executive Committee. Each concentration will have at least one adviser who will provide help and oversight to students for whom it is the focus concentration. The advisors will be available to meet with the BGS Executive Committee when necessary to provide information about course availability to update course selections within each concentration.

VII. FINANCING

A. SUPPORTING FUNDS FROM OUTSIDE SOURCES --List.

N.A.

B. NEW ACADEMIC DEGREE PROGRAM BUDGET PROJECTIONS FORM

EXECUTIVE SUMMARY

No new costs to the university are anticipated. This program serves a population of students who are already attending the university, and does so with existing courses and faculty. The four CLAS deans will provide funds for a modest stipend and one course release for the Director. If there are large shifts of students into this degree, requiring more advising support, some redirection of resources within the university may be necessary.

VIII. OTHER RELEVANT INFORMATION

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EXECUTIVE SUMMARY

Item Name: Request for New Academic Units for Arizona State University

Action Item

Requested Action: Arizona State University asks the board to approve the new academic unit requests effective in the 2021-2022 catalog year.

Background/History of Previous Board Action

As provided in the board policy, new academic unit requests may be submitted throughout the year with the approval of the Academic Affairs and Educational Attainment Committee.

Discussion

- ASU wishes to establish a new school under the Ira A. Fulton Schools of Engineering: School of Manufacturing Systems and Networks.
- To accentuate our strengths and accelerate innovation in support of the New Economy Initiative, the new School of Manufacturing Systems and Networks will provide avenues to support a strong engineering base and greater economic growth and stability.
- No net new resources will be required for the establishment of the school. Existing resources in the degrees related to manufacturing will be reallocated.
- The new school will position Fulton Schools of Engineering to contribute most effectively to the New Economy Initiative and its proposed Science and Technology Centers and to anticipate future opportunities.
- The Fulton Schools of Engineering have identified areas of opportunity in computing and augmented intelligence, systems engineering, advanced manufacturing engineering and science, and new paradigms for enabling technologically enhanced learners. These areas are important to ASU's and Fulton Schools of Engineering's national leadership across the university and country.

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EXECUTIVE SUMMARY

Committee Review and Recommendation

The Academic Affairs and Educational Attainment Committee reviewed this item at its April 1, 2021 meeting, and recommended forwarding the item to the full board for approval.

Statutory/Policy Requirements

ABOR Policy 2-223.C. "Academic Organizational Units"

EXECUTIVE SUMMARY

Request to Establish a New Academic Organizational Unit

University: Arizona State University

<p>Name of Organizational Unit:</p> <p>School of Manufacturing Systems and Networks</p>
<p>Academic Department: <i>The name of the academic department or college in which the organizational unit will be located</i></p> <p>Ira A. Fulton Schools of Engineering</p>
<p>Geographic Site: <i>The physical site (campus, extended campus, etc.) where the organizational unit will be located</i></p> <p>Polytechnic Campus</p>
<p>Proposed Inception Term: <i>The term and year in which the new organizational unit will begin operating</i></p> <p>Fall 2021</p>
<p>Brief Description: <i>A short outline of the activities that the organizational unit will perform. Please include, as applicable, a list of the degree and certificate programs that the unit will offer with estimates of the number of students served; an outline of research activities; public service and other significant activities.</i></p> <p>The Ira A. Fulton Schools of Engineering is requesting the creation of a new school, the School of Manufacturing Systems and Networks, within the Ira A. Fulton Schools of Engineering.</p> <p>ASU's New Economy Initiative represents a bold effort to ensure Arizona is prepared for a future economy that is dependent on a strong engineering base, accompanied by high employment, strong economic growth, and resilience to economic shocks. The New Economy Initiative proposes the development of Science and Technology Centers that would bring together faculty, students, and industry leaders to innovate, create, and produce, achieving both educational and industrial goals. Via its reorganization plan, the Fulton Schools of Engineering is seeking to differentiate its programs to most effectively address the New Economy Initiative and its proposed Science and Technology Centers and to anticipate future opportunities. Foci critical to the Fulton Schools of Engineering current impacts and future opportunities are in computing and augmented intelligence, systems engineering, advanced manufacturing engineering and science, and new paradigms for enabling technologically enhanced learners. These areas are important to ASU's and the Fulton Schools of Engineering's national leadership and impacts across the country and university.</p>

EXECUTIVE SUMMARY

The School of Manufacturing Systems and Networks research will focus broadly on areas of advanced manufacturing such as additive manufacturing, biomanufacturing, robotics and automation, and material processing. Other areas of focus will include data science, operations research, and applied statistics to analyze streams of data from networked facilities, as the next generation of smart factories will incorporate industry 4.0, advanced machine learning, and cyber-physical connectivity.

Research by the Brookings Institution and Information Technology and Innovation Foundation shows more than 90 percent of all U.S. high-tech job growth from 2005 to 2017 is concentrated in just five cities. Additional research findings demonstrate that technology industries are most productive when they have resources clustered to enable information sharing and access to a large talent pool.

The new unit will house the following degrees:

BS in Manufacturing Engineering
MS in Manufacturing Engineering
PHD in Systems Engineering
MSP in Systems Engineering (Master In Passing)

In Fall 2021, the new school will serve approximately 140 students.

Reason for Establishing the Organizational Unit:

Please briefly explain why the organizational unit is being created:

The creation of the School of Manufacturing Systems and Networks will cluster ASU's resources in systems engineering, advanced manufacturing engineering, and closely related disciplines to help produce a strong talent pool for the New Economy.

Resources

Please provide information about the personnel and infrastructure required to create this new unit, and an estimate of the costs associated.

No net new resources will be required. Existing resources in the Ira A. Fulton Schools of Engineering will be reallocated to fund the school, along with revenues generated through enrollment.

EXECUTIVE SUMMARY

Item Name: Request for New Organizational Unit for Northern Arizona University

Action Item

Requested Action: Northern Arizona University asks the board to approve the new organizational unit request effective in the summer of 2021.

Background/History of Previous Board Action

As provided in the board policy, new units may be submitted with the approval of the Academic Affairs and Educational Attainment Committee.

Discussion

- The Department of STEM Education will house the Center for Science Teaching and Learning (CSTL) and support all degree and non-degree programs, activities, and personnel within CSTL.
- Department structure will better support the mission of the unit and align with the organizational structures of the university for programs that are currently sponsored by CSTL.
- The Department of STEM Education will be funded through existing resources and no new expenses are anticipated.

Committee Review and Recommendation

The Academic Affairs and Educational Attainment Committee reviewed this item at its April 1, 2021 meeting, and recommended forwarding the item to the full board for approval.

Statutory/Policy Requirements

ABOR Policy 2-223.C. "Academic Locations, Degree Programs and Organizational Units"

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EXECUTIVE SUMMARY

Request to Establish a New Academic Organizational Unit

Northern Arizona University

<p>Name of Organizational Unit: Department of STEM Education</p>
<p>Academic Department: College of Education</p>
<p>Geographic Site: Science Annex Building #19, Flagstaff Mountain Campus</p>
<p>Proposed Inception Term: Summer 2021</p>
<p>Brief Description: The Department of STEM Education will house the current Center for Science Teaching and Learning (CSTL) and support all academic degree and non-degree programs, activities, and personnel within CSTL. The new structure will support the growth and advancement of initiatives, programs, and personnel for academic degree programs and non-degree components of STEM education at NAU, including the administration of the existing NAU Teach Program and its associated TSM courses which will continue to be conducted in partnership with the Department of Mathematics and Statistics. The academic degree programs currently administered or supported by the CSTL that will now be housed in the Department of STEM Education include:</p> <ul style="list-style-type: none"> • Science Teaching MA (MAST): An average of 10 students served each year over the past 5 years • Teaching Science with Certification MAT (MAT-S): An average of 10 students served each year over the past 5 years; In-service induction support provided to new teachers during their first two years of employment following graduation from NAU • Courses for the STEM Track of the Curriculum & Instruction PhD program: <ul style="list-style-type: none"> – TSM 620 – Research on Teaching and Teacher Learning in Science and Mathematics Ed. – TSM 621 – Learning Theories in Science and Mathematics Education – SCI 613 – Perspectives on Science – TSM 622 – Equity in Science & Mathematics Education – TSM 623 – Curriculum and Evaluation – SCI 640 - Survey of Research in Science Education • NAU Teach Program, in partnership with the Department of Mathematics and Statistics, offers TSM courses supporting 6 UG BSED Secondary Ed Science and Mathematics degree programs; 200 – 250 students served each year; In-service induction support provided to new teachers during their first two years of employment following graduation from NAU <p>Collectively between CSTL’s MAT-S program and the 6 undergraduate degree programs served and supported by the NAU Teach Program partnership, approximately 250 new secondary science and mathematics teachers have graduated from NAU over the last 10 years.</p>
<p>Reason for Establishing the Organizational Unit: The department is being established to provide an academic home for the academic programs currently managed by CSTL (listed above) and the Center for Science Teaching and Learning. Departmental status allows the programs to align with university and College of Education’s organizational structure for academic faculty, degree programs, and courses that are typically housed within an academic department rather than in a Center.</p>

EXECUTIVE SUMMARY

The department will provide structural efficiency for the programs currently sponsored by CSTL and will support extensive partnerships with colleges across NAU, school districts, informal education agencies (i.e., museums of science), and other educational entities. The department will further support the external funding obtained by CSTL (e.g., CSTL has received over \$15M in external funding during the past 10 years) to include competitive grant awards, both state and national level; contract agreements with school districts and other educational agencies; philanthropic donations, and endowment funds.

Overall, this change will enable a supportive structure for the growth and advancement of initiatives, programs, and personnel both in the academic degree and non-degree components of STEM education at NAU.

Resources

No new resources are being requested at this time.

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EXECUTIVE SUMMARY

Item Name: Request for New Academic Programs for the University of Arizona

Action Item

Requested Action: The University of Arizona asks the board to approve the new program requests effective in the 2021-2022 academic year.

Background/History of Previous Board Action

As provided in the board policy, new program requests may be submitted throughout the year with the approval of the Academic Affairs and Educational Attainment Committee.

Discussion

The University of Arizona seeks to add five new programs for implementation in the 2021-2022 academic year. This request is for the following new academic programs:

- BA in Live and Immersive Arts
- BA in Design Arts and Practice
- BA in Wellness and Health Promotion Practice
- BS in Software Engineering
- BS in Medicine

All academic degree programs go through multiple review and approval processes to ensure their currency, quality, and relevance. Each year, the Provost initiates the academic planning process. The academic deans, in consultation with the directors of the academic units, submit information on all proposed new degrees, concentrations, minors, and certificates for the ensuing year, as well as changes to existing degree titles, program disestablishments, and creation of new organizations, organizational changes and disestablishments. Once reviewed and approved by the Provost, these initiatives begin the review process, including, as applicable, the curriculum committees in the academic unit, college, Graduate College, and University Senate. At each level, a substantive review of the proposed program is completed to ensure quality and to avoid redundancy with other programs. At any step in the approval process, programs can be tabled and/or returned to the academic unit for further clarification and/or revision.

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EXECUTIVE SUMMARY

Committee Review and Recommendation

The Academic Affairs and Educational Attainment Committee reviewed this item at its April 1, 2021 meeting, and recommended forwarding the item to the full board for approval.

Statutory/Policy Requirements

ABOR Policy 2-223.A, "The Academic Strategic Plan"

New Academic Program Request

University of Arizona

Name of Proposed Academic Program: Live and Immersive Arts (BA)				
Academic Department: School of Art and School of Theatre Film and Television				
Geographic Site: Main Campus Tucson AZ				
Instructional Modality: In-Person				
Total Credit Hours: 120				
Proposed Inception Term: Fall 2021				
<p>Brief Program Description:</p> <p>The Bachelor of Arts degree in Live and Immersive Arts seeks to produce a new generation of artists and designers who work across all story-driven media, from film and visually interactive media to live audience environments by creating digital technology, soundscapes, images, events and environments. The Live and Immersive Arts degree will focus on training students to view design as a method of problem solving by working simultaneously with virtual and physical environments and what they contain.</p> <p>A collaboration between the School of Theatre, Film & Television and the School of Art in the College of Fine Arts, this interdisciplinary degree will take advantage of the broad range of areas of study on offer at the university. Live and Immersive Arts approaches the creative process as a form of Storytelling. Students will be introduced to the classic script-based processes of theatre and film and expand their knowledge of non-linear storytelling with a focus on creating visually and sonically immersive performative experiences. This unique interdisciplinary opportunity will help grow a student’s artistic voice, interests, and concepts of fine art, while fostering a collaborative team-orientated creative environment.</p> <p>Live and Immersive Arts will push a student to not only think about the relationship between medium, form, and narrative content, but how to consider the various technologies available to bring their story to life. The project-based course work will provide students with a knowledge of industry and technology standards as well as hands-on experience that will prepare them for the future workplace. Students will study the use of industry-standard and emerging software and extended reality tools and their application in the fields of Animation, Visual Effects, Motion Capture, Experimental Film Practices, Immersive Art, and Digital Storytelling. These skills may be applied in the processes associated with creating Space and Exhibit Designs, Cultural and Entertainment Destinations, Music and Multimedia Festivals, Amusement and Theme Parks, Trade Show Displays, Alternative Theatre, and many other diverse avenues associated with the entertainment industry.</p>				
Learning Outcomes and Assessment Plan:				
	Learning Outcomes	Sources(s) of Evidence	Assessment Measures	Data Collection Points

	<p>Outcome 1: Students will demonstrate the knowledge of basic linear and nonlinear narrative structures and be able to utilize this knowledge for effective storytelling.</p>	<p>Direct: Course – Embedded Assessments</p> <p>Indirect: Senior Exit Surveys</p>	<p>Completed Project Process Paperwork and Final Product</p> <p>Summative critical self-reflections</p>	<p>End of Senior</p> <p>Capstone: TAR/ART 498</p>
	<p>Outcome 2: Students will analyze the relationship between medium, form, and narrative content and how to consider the various technologies available to bring their story to life.</p>	<p>Direct: Course – Embedded Assessments</p> <p>Indirect: Senior Exit Surveys</p>	<p>Completed Project Process Paperwork and Final Product</p> <p>Summative critical self-reflections</p>	<p>End of Senior</p> <p>Capstone: TAR/ART 498</p>
	<p>Outcome 3: Students will possess knowledge around current trends of immersive and performative experiences as well as the history and the evolution of new media and technology and how it relates to the human experience.</p>	<p>Direct: Course – Embedded Assessments</p> <p>Indirect: Senior Exit Surveys</p>	<p>Exams, papers, and other forms of student work</p> <p>Summative critical self-reflections</p>	<p>End of Course: TAR 3xx: History/Survey of Entertainment Technology</p>
	<p>Outcome 4: Students will be able to demonstrate a strong artistic voice, while showcasing the ability to collaborate and work in a team based</p>	<p>Direct: Course – Embedded Assessments</p> <p>Indirect: Senior Exit Surveys</p>	<p>Completed Project Process Paperwork and Final Product</p> <p>Summative critical self-reflections</p>	<p>End of Senior</p> <p>Capstone: TAR/ART 498</p>

environment.			
Outcome 5: Students will be able to assimilate knowledge to create projects relevant to the Live and Immersive Industry.	Direct: Course – Embedded Assessments Indirect: Senior Exit Surveys	Completed Project Process Paperwork and Final Product Summative critical self-reflections	End of Senior Capstone: TAR/ART 498

Program Assessment Plan:

Assessment Measure	Source(s) of Evidence	Data Collection Point(s)
Job Placement Statistics	Student/Alumni Survey	1 year after Graduation/ 5 years after Graduation.
Retention Rate/Graduation Rate	College of Fine Arts Statistics	Every 4 years
Senior Exit Survey	Student/Survey	Every 4 years upon Graduation

Projected Enrollment for the First Three Years:

Year 1	Year 2	Year 3
10	35	75

Evidence used to determine projected enrollment:

The University of Nebraska at Lincoln started their Emerging Media Arts BFA in 2019 and accepted a freshman class of a total of 31 total students. In 2020 their program grew to 40 incoming freshmen. University of Texas at Austin began their Arts and Entertainment Technologies BS Degree in fall of 2016, and had an incoming class of 112 incoming students. Since its program launch in 2016, University of Texas at Austin has grown their program to 365 students by year four.

Based on these universities' enrollment numbers on a traditional academic release and recruitment season, we have reduced our numbers to reflect a midyear release and beginning recruitment midway through the recruitment season. The numbers for year two and beyond are then built to represent an increase similar to what these peer institutions are experiencing.

Evidence of Market Demand:

Over the last decade, the arts and entertainment industry has seen a dramatic shift in aesthetics as technology has been introduced and redefined the human experience. Nonlinear storytelling experiences such as Meow Wolf, Builders Association, Escape Rooms, Interactive Exhibits, Sleep No More, have been paving the way by integrating new technology

to create live and immersive experiences focused on the impact of the mind, body, and senses of the active participants. This shift has created the need for a new generation of artists to engage in the storytelling conversation in an innovative way. Evidence suggests there is a significant unmet demand for this program across not only the state and regional, but also the national level. Currently, only two public universities have undergraduate programs like the proposed BA in Live and Immersive Arts. University of Texas at Austin opened their Arts and Entertainment Technologies BS Degree in the Fall of 2014 and over the last 6 years the program has grown to 600 enrolled majors. Likewise, in 2019 University of Nebraska at Lincoln accepted their first incoming class of 31 enrolled majors out of a pool of over 80 applicants for their Emerging Media Arts BFA. This year they will be adding 40 majors out of a pool of 80 applicants. However, unlike University of Texas and University of Nebraska, the Live and Immersive Arts BA at the University of Arizona, housed in the national ranked School of Art and School of Theatre, Film and Television, has a unique opportunity to capitalize and incorporate with the mosaic of culture, artistic voices, and innovators that has for years made Tucson and the Sonoran Desert a Mecca for emerging artists in the Southwest.

The Live and Immersive Arts Degree's project-based coursework will provide students with a knowledge of the industry that will prepare them for the future workplace in several different avenues. Graduates will be uniquely positioned to approach companies and projects such as Third Floor Visualization, Disney Imagineering, Universal Creatives, Feld Entertainment, cruise lines, escape rooms, music festivals, multimedia festivals and interactive experiential exhibits for the ever developing and evolving entertainment industry. Additionally, graduates of the Live and Immersive Arts Degree will be well prepared to apply and enter several Master of Fine Arts Programs across the country, such as the Experiential Design MFA at University of Colorado Bolder, Experience Design MS at Arizona State University, and Experience Design MFA at Northeastern University.

As stated above, the Live and Immersive Arts Industry offers graduated a great many avenues after graduated. When looking at the Field of Design as a Cluster on Burning Glass Technologies Labor Insight jobs, the cluster including Animators and Game Design, Creative Design, Digital Design, and Graphic and Visual Design saw a total of 1,337,684 jobs posted From October 1, 2018-September 30, 2019. The projected Job market over the next 5 years for positions in the Live an Immersive Arts industry are expected to increase and grow. For example, Creative positions such as Art Directors had a total of 10,896, and Multimedia Designers/Animators had a total of 8,957 jobs posted in the last twelve months. Both positions have an expected growth rate of over 5%. While technical positions such as Audio-Visual Technicians in the last 12 months have had 12,665 jobs posted, and a growth rate of 12.8% and Software Developers and Engineers saw 940,702 jobs posted in the last 12 months with an expected growth of 30.7%.

Similar Programs Offered at Arizona Public Universities:
 None

New Resources Required? (i.e. faculty and administrative positions; infrastructure, etc.):
 The BA in Live and Immersive Arts was developed in a way intended to maximize existing resources, especially during the initial stages of the program's implementation. Given the projected size of the program (around 200 majors), additional resources will ultimately be required as the program grows. At the full projected capacity, we anticipate 3 FTE of faculty and 1 FTE of staff dedicated to the program as well as specialized equipment and newly allocated lab/studio space. Much of the initial support needed on the equipment and facilities side has already been identified through capital donations to the School of Art and School of Theater Film and Television as well as through support provided by the

Provost's Strategic Investment Fund (\$200K over FY21 and FY22). Using the current RCM model for projections, the program will be net positive in revenue beginning in year 3.

~~Program Fee~~/Differentiated Tuition Required? YES X NO Δ
Estimated Amount: \$300/semester

Differentiated Tuition Justification: This is consistent with all CFA Majors, as well as help offset the technology costs needed for classroom instruction.

Specialized Accreditation? YES Δ NO X

Accreditor:

Live and Immersive Arts BA

Outcome				
<p>Outcome 1 Students will demonstrate the knowledge of basic linear and nonlinear narrative structures and be able to utilize this knowledge for effective storytelling.</p>	<p>Outcome 2 Students will analyze the relationship between medium, form, and narrative content and how to consider the various technologies available to bring their story to life.</p>	<p>Outcome 3 Students will possess knowledge around current trends of immersive and performative experiences as well as the history and the evolution of new media and technology and how it relates to the human experience.</p>	<p>Outcome 4 Students will be able to demonstrate a strong artistic voice, while showcasing the ability to collaborate and work in a team based environment.</p>	<p>Outcome 5 Students will be able to assimilate knowledge to create projects relevant to the Live and Immersive Industry.</p>

Courses and Learning Activities					
TAR/ART 498 Capstone	A	A		A	A
TAR 3xx History/Survey of Entertainment Technology			A		
Survey Exit survey (Indirect)	A	A	A	A	A

Legend :	I Introduced	P Practiced	A Assessed	I/P Introduced/Prac
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BUDGET PROJECTION FORM

Name of Proposed Program or Unit:

Name of Proposed Program or Unit: BA in Live and Immersive Arts	Prior Activity	Projected		
		1st Year 2021 - 2022	2nd Year 2022 - 20 23	3rd Year 2023 - 2024
Budget Contact Person: Colin Blakely				
METRICS				
Net increase in annual college enrollment UG		10	35	75
Net increase in college SCH UG		130	445	910
Net increase in annual college enrollment Grad		-	-	-
Net increase in college SCH Grad		-	-	-
Number of enrollments being charged a Program Fee		-	-	10
New Sponsored Activity (MTDC)		-	-	-
Number of Faculty FTE		-	2	2
FUNDING SOURCES				
Continuing Sources				
UG RCM Revenue (net of cost allocation)		39,220	135,040	279,655
Grad RCM Revenue (net of cost allocation)				
Program Fee RCM Revenue (net of cost allocation)		-	-	3,000
F and A Revenues (net of cost allocations)				
UA Online Revenues				
Distance Learning Revenues				
Reallocation from existing College funds (attach description)				
Other Items (attach description)				
Total Continuing		\$ 39,220	\$ 135,040	\$ 282,655
One-time Sources				
College fund balances				
Institutional Strategic Investment	100,000.00	100,000		
Gift Funding	5,000,000.00			
Other Items (attach description)				
Total One-time	\$ 5,100,000	\$ 100,000	\$ -	\$ -
TOTAL SOURCES	\$ 5,100,000	\$ 139,220	\$ 135,040	\$ 282,655
EXPENDITURE ITEMS				
Continuing Expenditures				
Faculty		5,000	140,000	140,000
Other Personnel			45,000	45,000
Employee Related Expense		1,550	57,350	57,350
Graduate Assistantships				
Other Graduate Aid				
Operations (materials, supplies, phones, etc.)				
Additional Space Cost				
Other Items (attach description)				
Total Continuing		\$ 6,550	\$ 242,350	\$ 242,350
One-time Expenditures				
Construction or Renovation		5,000,000		
Start-up Equipment	100,000.00	200,000		
Replace Equipment				
Library Resources				
Other Items (attach description)				
Total One-time	\$ 100,000	\$ 5,200,000	\$ -	\$ -
TOTAL EXPENDITURES	\$ 100,000	\$ 5,206,550	\$ 242,350	\$ 242,350
Net Projected Fiscal Effect	\$ 5,000,000	\$ (5,067,330)	\$ (107,310)	\$ 40,305

Undergraduate Major Peer Comparison Chart - select two peers for completing the comparison chart from (in order of priority) [ABOR-approved institutions](#), [AAU members](#), and/or other relevant institutions recognized in the field. The comparison chart will be used to identify typically required coursework, themes, and experiences for majors within the discipline. The comparison programs are not required to have the same degree type and/or major name as the proposed UA program. Information for the proposed UA program must be consistent throughout the proposal documents.

Program name, emphasis (sub-plan) name (if applicable), degree, and institution	Proposed UA Program: Live and Immersive Arts (BA)	Peer 1: Art and Entertainment Technologies (BS) University of Texas at Austin	Peer 2: Emerging Media Arts (BFA) University of Nebraska-Lincoln
Current # of enrolled students		365 Students	71 Students (2 year old program)
Major Description. Includes the purpose, nature, and highlights of the curriculum, faculty expertise, emphases (sub-plans; if any), etc.	<p>The Bachelor of Arts degree in Live and Immersive Arts seeks to produce a new generation of artists and designers who work across all story-driven media, from film and visually interactive media to live audience environments by creating digital technology, soundscapes, images, events and environments. The Live and Immersive Arts degree will focus on training students to view design as a method of problem solving by working simultaneously with virtual and physical environments and what they contain.</p> <p>A collaboration between the School of Theatre, Film & Television and the School of Art in the College of Fine Arts, this interdisciplinary degree will take advantage of the broad range of areas of study on offer at the university. Live a Immersive Arts approaches the creative process as a form of Storytelling. Students will be introduced to the classic script-based processes of theatre and film, and expand their knowledge of non-linear storytelling with a focus on creating visually and sonically immersive performative experiences. This unique interdisciplinary opportunity</p>	<p>Arts and Entertainment Technologies is focused on professional practice in immersive media, experience design, and interactive systems. Faculty noted for their professional excellence and experience teach a diverse set of courses in design and technology. Students work with faculty and each other to produce state-of-the-art content in an interdisciplinary academic setting aligned with the missions of both the College of Fine Arts and The University of Texas.</p> <p>Coursework is centered around design methods, coding, game development, real-time graphics, sound design, simulation, collaboration, emerging technology, storytelling, and interconnected modes of production and distribution. Through this curriculum, students are prepared for careers in the fields of real-time technology, mixed reality, and immersive media which are powering new forms of design, education, and business.</p>	<p>This simple mantra—inspired by the scientific measurement unit used to reflect a dramatic shift in power—captures the entire mission of the Johnny Carson Center for Emerging Media Arts. We exist to inspire our students to dream bigger. We teach them how to boldly leverage new and emerging technologies. We push them to pursue audacious new career pathways and to tackle global-scale problems. We ignite their curiosity and help them learn how to master the universal art of storytelling. Our students will help design and create new jobs and industries of the future because we will nurture, support, educate and equip them to realize their most aspirational dreams.</p> <p>Borne out of a groundbreaking \$57 million partnership between the Hixson-Lied College of Fine and Performing Arts at the University of Nebraska-Lincoln, the Johnny</p>

	<p>will help grow a student's artistic voice, interests, and concepts of fine art, while fostering a collaborative team-orientated creative environment.</p> <p>Live and Immersive Arts will push a student to not only think about the relationship between medium, form, and narrative content, but how to consider the various technologies available to bring their story to life. The project-based course work will provide students with a knowledge of industry and technology standards as well as hands-on experience that will prepare them for the future workplace. Students will study the use of industry-standard and emerging software and extended reality tools and their application in the fields of Animation, Visual Effects, Motion Capture, Experimental Film Practices, Immersive Art, and Digital Storytelling. These skills may be applied in the processes associated with creating Space and Exhibit Designs, Cultural and Entertainment Destinations, Music and Multimedia Festivals, Amusement and Theme Parks, Trade Show Displays, Alternative Theatre, and many other diverse avenues associated with the entertainment industry.</p>		<p>Carson Foundation, and numerous private industry partners, the Johnny Carson Center for Emerging Media Arts will become a global destination for students and faculty who reside in the future and who share our ambitious ideas, plans and goals.</p> <p>In our vision of the future, the Johnny Carson Center for Emerging Media Arts has become the premier destination in the world for creative, young pioneers who use technology to innovate, to solve human-scale problems, to entertain audiences, and to tell breathtaking stories that stimulate, provoke and inspire.</p> <p>We will produce transformative creative leaders by building the ultimate student-centered program where every graduate is able to realize their dream job or raise money to start their dream company, straight out of school.</p>
<p>Target careers</p>	<ul style="list-style-type: none"> + Film Visualization/ Special Effects +Virtual Reality Design +Augmented Reality Design +Exhibit Design +Immersive Design +Entertainment Design + Theme Park Experience Designer +Animator/ Animation 	<p>Gaming Design and Technology</p> <p>Computer programming</p> <p>Building objects and experiences with electronics</p> <p>Traditional art transformed through technology</p>	<ul style="list-style-type: none"> +Film Making +Film Production Design +Film Visual Effects +Game Designer +Virtual Reality Designer +Theme Part Experience Designer +Animation +App Designer +Robotics

	+Interactive Experiences Designer + Art Director +App design/engineering	Theater technologies and interactive experiences Augmented or virtual reality technology	+Artificial Intelligence +Sound Designer +Innovation Designer +Creative Technologist +Wearables/Physical Computing
Total units required to complete the degree	120	120	120
Upper-division units required to complete the degree	42	42	42
Foundation courses			
Second language	4 th semester Proficiency	6-12 hours of foreign language	4 th Semester Proficiency
Math	G-Strand	3 Credits Math	
Pre-major? (Yes/No). If yes, provide requirements. Provide email(s)/letter(s) of support from home department head(s) for courses not owned by your department.	No	No	No
List any special requirements to declare or gain admission to this major (completion of specific coursework, minimum GPA,	No Special Requirements	Secondary Application to gain acceptance.	Secondary application to gain acceptance

interview, application, etc.)			
Major requirements			
Minimum # of units required in the major (units counting towards major units and major GPA)	49	42	48
Minimum # of upper-division units required in the major (upper division units counting towards major GPA)	30	33	30
<u>Minimum # of residency units to be completed in the major</u>	18	60	90
Required supporting coursework (courses that do not count towards major units and major GPA, but are required for the major). Courses listed must include prefix, number, units, and title. Include any limits/restrictions needed (house number limit, etc.). Provide email(s)/letter(s) of support from home department head(s) for	None Required	None Required	None Required

<p>courses not owned by your department.</p>			
<p>Major requirements. List all major requirements including core and electives. If applicable, list the emphasis requirements for each proposed emphasis. Courses listed count towards major units and major GPA. Courses listed must include prefix, number, units, and title. Mark new coursework (New). Include any limits/restrictions needed (house number limit, etc.). Provide email(s)/letter(s) of support from home department head(s) for courses not owned by your department.</p>	<p><u>Major Core (22 Units)</u> Choose 1: (3 Units total) TAR 121 Intro to Arts and Entertainment (3 units) FTV 210 Introduction to Production Practices (3 units)</p> <p>Choose 2 (4 units total): ART 100A Mapping (2 units) ART 100B Space (2 units) ART 100D Experience (2 units) ART 100F Amalgam (2 units)</p> <p>Complete all: TAR 224 Theatre Graphics (3 Units) TAR 145 Principles of Dramatic Structure (3 units) ISTA 130 Computational Thinking and Doing (3 Units) ART 3XX (New) Physical Computing in the Arts (3 units) TAR 3XX (New) History of Entertainment Technology (3 units)</p> <p><u>Electives (21 Credits):</u> Choose 1 (3 units total): ARH 370 History of Modern Design (3 units) FTV 422 Visual Effects History (3 units) ISTA 301: Computing and the Arts (3 units)</p> <p>Choose 2: (6 Units total)</p>	<p>Major Requirements <u>Foundations:</u> AET 304: Foundations of AET (3 Units) AET 310 Foundations of Creative Coding (3 Units)</p> <p>Lower Division AET Electives (9 Units) AET 306: Fundamentals of Digital Imaging and Visualization AET 315: Foundations of Design AET 316C: Foundations of Projection, Lighting, and Interactivity. AET 318C: Foundations of Video Game Development AET 319: Production Lab 1</p> <p>Colloquium AET 101 Colloquium (1 units) AET 102 Colloquium II (1 unit) AET 103 Colloquium III (1 Unit)</p> <p><u>Advanced Course Work:</u> Upper Division AET Electives (24 Units)</p> <p>AET 320D: Musical Acoustics AET 321C: Audio Processing AET 320G: Audio Coding 1 AET 323 D: Interactive Music AET 323 E: Video Game Audio 1 AET 324C: Intro to Drawing AET 324D: Principles of Animation AET 324F: Videography AET 324J: Visual Storytelling AET 324K: Web Design and Interaction AET 324P: Adv. Production Lab AET 325C: Intro to 2D Animation AET 326C: 3d Modeling and Texturing AET 326D: 3D Materials and Lighting AET327: Adv. 3D Modeling AET 329E: Design Skills Lighting</p>	<p>Core: Story Lab 1 (3 Units) Story Lab 2 (3 Units) Visual Expression Studio 1 (3 Units) Visual Expression studio 2 (3 Units) Computation and Media Studio 1 (3 Units) Computation and Media Studio 2 (3 Units) Games, Play, and Performance (3 Units) Ethics of Emerging Media (3 Units)</p> <p>History of Media Arts (3 Units) Sound Lab (3 Units) Intro to Entrepreneurial management. (3 Units) Innovation Studio 1 (3 Units) Innovation Studio 2 (3 Units) World Ready (3 Units) Capstone (6 Units)</p>

	<p>TAR 361 Theatrical Devising (3 units) TAR 462 Collaborative Play Development (3 units) TAR 225 Scenic Design 1 (3 units) TAR 425 Scenic and Costume Design 2 (3 units) *Scenic Section* TAR 220 Lighting 1 (3 units) TAR 420 Adv. Lighting (3 units) TAR 319 Intro to Sound (3 units) TAR 419 Adv. Sound (3 units) ART 286 Extended Media (3 units)</p> <p>Choose 3: (9 Credits Total) ART 431 3D Animation (3 units) ART 462D Motion (3 units) ART 432A Interactivity (3 units) ISTA 424 Virtual Reality (3 units) ART 436A Digital Arts Authoring (3 units) ART 306B Animation (3 units) ART 438 Digital Fabrication (3 units) TAR 417 Electricity for the Entertainment Electrician (3 units) FTV 313 Experimental Practices (3 units)</p> <p>Choose 1: (3 Credits Total) TAR/ART 494 Practicum (3 units) TAR/ART 499 Independent Study (3 units)</p>	<p>AET 329F: Interactive Lighting Environments AET 331: Computer Music Programming AET 334E: Video Game Art Pipeline AET 3334F: Video Game Scripting AET 334K: Video Game Prototyping AET 334L: UI/UX for Video Games AET 337: Writing for interactive Games AET 341C: Virtual Instruments AET 341D: Digital Musicianship AET 334F: Design Skills: Projection AET 345E: Design Skills: Digital Experience AET345G: Responsive Environments AET 347D: Generative Media AET 348C: Live Event Engineering AET 348G: Media Design/Technology AET351: Live Audio Mixing AET 351: Audio Production Lab</p> <p><u>Senior Project:</u> 6 units from: AET 372: Senior Design Projects 1 AET 373: Independent Study AET 376: Game Capstone: 2D AET377: Senior Thesis 1</p> <p><u>Secondary Field of Study:</u> Lower or Upper Division (6 Units) Upper Division (9 Units)</p>	
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	<p><u>Senior Requirements: (3 Credits)</u> Choose 1 (3 Units) ART/TAR 4XX New Career Development for Live and Immersive Arts (3 units) ART/TAR 493: Internship (3 units)</p> <p><u>Senior Capstone: (3 Credits)</u> ART/TAR 498: Senior Capstone (3 units)</p> <p>Total: 49 units</p>		
Internship, practicum, applied course requirements (Yes/No). If yes, provide description.	Internship not required, but offered as an option	Not Required.	Not Required
Senior thesis or senior project required (Yes/No). If yes, provide description.	Career Development or internship (3 units) Senior Capstone Project (3 units)	Yes, Senior Capstone Project with an independent study (6 Units)	Yes a Senior Capstone project (6 Units)
Additional requirements (provide description)	Earn a 2.5 major GPA	Must Earn a 2.0 GPA	Must Earn a 2.0 GPA
Minor (specify if optional or required)	Required.	Required	Required. (Dual Emphasis)

*Note: comparison of additional relevant programs may be requested.

New Academic Program Request

University of Arizona

Name of Proposed Academic Program: Design Arts and Practice BA	
Academic Department: College of Fine Arts	
Geographic Site: UA MAIN (Tucson, AZ) and AZOnline	
Instructional Modality: Fully in-person, fully online, and potentially hybrid courses	
Total Credit Hours: 120	
Proposed Inception Term: Fall 2021	
<p>Brief Program Description: The Design Arts & Practices (DAP) degree will provide you the opportunity to develop a foundation in design thinking and making from an interdisciplinary perspective that you will be able to apply to a career in fields such as Experience and User Interface Design, Product Design, Industrial Design, Information Design, Graphic Design / Desktop Publishing, Interior and Spatial Design, Set and Exhibition Design, Environmental and Fashion Design, Art / Illustration, Multimedia Design / Animation, Art Direction, Web Design. This major is a great fit for you if you are passionate about art, design, and information and how they come together and are applied to making a better world. In this interdisciplinary degree you will be able to take classes from the School of Art and the School of Information (Arizona's iSchool). DAP students will develop core conceptual and technical skills to design artifacts and experiences across a range of scales and media. Project-based courses will build your abilities in problem solving and seeking, innovating with and through technologies, and developing creative visual strategies to address problems (climate change, social justice issues, representation and identity, education, limited water supplies, wildfires in local community, understanding information). History, theory, and academic courses will construct cultural frameworks for depth and breadth in research and application. Courses across Art, Design, Information Studies and Technology in distinct, interdisciplinary ways will shape your degree plan moving from foundations and skills over the first two years, to theories and issues, and a culminating capstone project. Capstone projects will be developed through transdisciplinary lenses, and will tackle challenges spanning fields from Social Justice, Design and the Environment.</p>	
Learning Outcomes and Assessment Plan:	
Outcome 1	Design Research: Students will demonstrate design thinking and fundamentals and apply iterative design processes to real world problems.
Outcome 2	Process: Students will integrate a range of media or materials, technical processes, prototyping and creative strategies to problem solving and seeking.
Outcome 3	Context: Students will synthesize a breadth of knowledge concerning the history of design, contemporary practices and social issues.
Outcome 4	Manage Complex Problems: Students will develop the ability to coordinate and sequence multiple tasks and synthesize complex parameters and systems.
Outcome 5	Engagement:

	Students will employ collaborative skills and demonstrate cultural awareness and empathy to engage with society in meaningful ways to projects.
Outcome 6	Professional Practice: Students will formulate their design portfolio and demonstrate communication skills.

Assessment Plan:

Learning Outcomes	Sources(s) of Evidence	Assessment Measures	Data Collection Points
Design Research: Students will demonstrate design thinking and fundamentals and apply iterative design processes to real world problems.	Capstone Project Exit survey of graduating students	Grading Rubric Self-assessed rating	End of ART498 DAP Capstone course Exit survey just prior to graduation
Process: Students will integrate a range of media or materials, technical processes, prototyping and creative strategies to problem solving and seeking.	Capstone Project Exit survey of graduating students	Grading Rubric Self-assessed rating	End of ART498 DAP Capstone course Exit survey just prior to graduation
Context: Students will synthesize a breadth of knowledge concerning the history of design, contemporary practices and social issues.	Capstone Project Required Art History Courses Exit survey of graduating students	Grading Rubric Grading Rubric Self-assessed rating	End of ART498 DAP Capstone course Throughout the length of the course Exit survey just prior to graduation
Manage Complex Problems: Students will develop the ability to coordinate and sequence multiple tasks and synthesize complex parameters and systems.	Capstone Project Exit survey of graduating students	Grading Rubric Self-assessed rating	End of ART498 DAP Capstone course Exit survey just prior to graduation
Engagement: Students will employ collaborative skills and demonstrate cultural awareness and empathy to engage with society in meaningful ways to projects.	Capstone Project Exit survey of graduating students	Grading Rubric Self-assessed rating	End of ART498 DAP Capstone course Exit survey just prior to graduation
Professional Practice: Students will formulate their design portfolio and	Capstone Project Exit survey of graduating students	Grading Rubric Self-assessed rating	End of ART498 DAP Capstone course Exit survey just prior to graduation

demonstrate communication skills.			
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Projected Enrollment for the First Three Years:

Year 1	Year 2	Year 3
20	45	80

Evidence used to determine projected enrollment:

- The number of students who do not get accepted into the current programs offered through the College of Fine Art and School of Information in the College of Social & Behavioral Sciences.
- Enrollment numbers are also based on the projected number of students who may enroll into this program if given the option when switching majors

Evidence of Market Demand:

BA in Design Arts & Practices (DAP) leverages a wealth of existing UA faculty expertise and courses across Art, Design, Information Studies and Technology in unique, interdisciplinary ways to shape a curriculum moving from foundations and skill building over two years to theories and issues and a culminating capstone project. DAP students' design skills and thinking will take on critical relevance through interdisciplinary capstone studios in alliance with other University of Arizona programs and centers— Environmental and Natural Resources and other Sciences, Engineering, Law, and Medicine—curated 32 around pressing issues of the moment. Through these transdisciplinary lenses, students will tackle challenges from Social Justice, Design and the Environment, and Health Sciences.

Interdisciplinary design is about grappling with complexity. Critical issues such as the Covid-19 global pandemic have revealed the vital role interdisciplinary designers play by communicating complex information through data visualizations, by designing innovative solutions using rapid prototyping and fabrication, and by devising new ways to conceive and inhabit spaces. These conditions reveal the role of designed images, interfaces, objects and spaces in bringing health and safety, comfort and joy.

This program will provide students with experience working interdisciplinarily and working together to tackle real world problems while giving them tangible skills, knowledge and experience needed for successful art and design careers for today and the future. Students will also have developed soft skills in collaboration, empathy, and human-centered design processes. The design profession is broad, and careers can include such titles as: User Experience, User Interface, Visual/Graphic Communication; Spatial, Environmental, Interior, Urban Space, Exhibition, Scenographic, Event, and Performance Designer; Object and Product Designer, Human Centered Designer, Embodied Technology/Interaction Design, Creative Designer, Design Researcher, Experience Strategist, Design Manager, etc. Alumni have noted that should this type of program existed they would have been interested to have studied in such a program.

As indicated by the employment potential data, there were 2015 jobs listed in Arizona in the past 12 months. There are potentials for visual design as well as front end application design, product design, and fashion, floral, and interior design indicated by market surveys. The average salary in Arizona for this is \$58,904. These salary numbers are based on the burning glass models. 79% of the jobs posted in design and visual communications indicated a bachelor's degree was necessary. The top job titles in this study in the burning glass data were graphic designer, interior design, creative director, product design engineer, content producer, senior digital design engineer, product designer, web designer, production artist, art director. Top employers identified in Arizona are Raytheon, Arizona State University, Go Daddy Software and NBC. Some of the top skills needed that our program covers are adobe photoshop, graphic design, Adobe InDesign, Adobe Illustrator, Adobe Acrobat, Adobe

Creative Suite. Baseline skills for this profession are creativity, communication skills, teamwork/collaboration, problem solving, writing, research, and organizational skills.	
Similar Programs Offered at Arizona Public Universities: Digital Culture (Art and Design Studies), BA, ASU	
New Resources Required? (i.e. faculty and administrative positions; infrastructure, etc.): Please see budget sheet	
Program Fee/Differentiated Tuition Required? Estimated Amount: NA	YES <input type="checkbox"/> NO <input checked="" type="checkbox"/>
Program Fee Justification: NA	
Specialized Accreditation?	YES <input checked="" type="checkbox"/> NO <input type="checkbox"/>
Accreditor: National Association of Schools of Art and Design (NASAD)	

BA Design Arts and Practices

	Outcome					
	Outcome 1 Design Research Students will demonstrate design thinking and fundamentals and apply iterative design processes to real world problems.	Outcome 2 Process Students will integrate a range of media or materials, technical processes, prototyping and creative strategies to problem solving and seeking.	Outcome 3 Context: Students will synthesize a breadth of knowledge concerning the history of design, contemporary practices and social issues.	Outcome 4 Manage Complex Problems: Students will develop the ability to coordinate and sequence multiple tasks and synthesize complex parameters and systems.	Outcome 5 Engagement: Students will employ collaborative skills and demonstrate cultural awareness and empathy to engage with society in meaningful ways to projects.	Outcome 6 Professional Practice Students will formulate their design portfolio and demonstrate communication skills.
Courses and Learning Activities						
Foundation History and Theory (3 units) ART 119			I		I	
Foundation Course assignments (6 units) ART 100A, ART 100B, ART 100C, ART 100D, ART 100E, ART 100G		I				I
Core Areas Screen and Print (16 units) 10 upper division units	I/P	I/P	P/A	P	P	P
Elective course Transdisciplinary electives (14-17 units)		P			P	P/A
Upper division History and Theory (6 units)			P		A	
Program Assessment Activities						
ART 498 Capstone The Capstone project will be evaluated with a standard rubric for each of the outcomes.	A	A	A	A	A	A
Exit Survey Exit survey (Indirect)	A	A	A	A	A	A
Legend :	I	P	A	I/P		
	Introduced	Practiced	Assessed	Introduced/Prac		

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BUDGET PROJECTION FORM

Name of Proposed Program or Unit:

Budget Contact Person: Michelle Stone Eklund	Projected		
	1st Year 2021 - 2022	2nd Year 2022 - 2023	3rd Year 2023 - 2024
METRICS			
Net increase in annual college enrollment UG	20	45	80
Net Increase in Arizona Online enrollment UG (from above total)	10	15	20
Net increase in college SCH UG	80	280	630
Net increase in Arizona Online SCH UG	80	160	250
Net increase in annual college enrollment Grad	-	-	-
Net increase in college SCH Grad	-	-	-
Number of enrollments being charged a Program Fee	-	-	10
New Sponsored Activity (MTDC)	-	-	-
Number of Faculty FTE	0.75	1	1
FUNDING SOURCES			
<u>Continuing Sources</u>			
UG RCM Revenue (net of cost allocation)	28,070	93,130	201,870
Grad RCM Revenue (net of cost allocation)			
Program Fee RCM Revenue (net of cost allocation)	-	-	3,000
F and A Revenues (net of cost allocations)			
UA Online Revenues	39,200	78,400	122,500
Distance Learning Revenues			
Reallocation from existing College funds (attach description)			
Other Items (attach description)			
Total Continuing	\$ 67,270	\$ 171,530	\$ 327,370
<u>One-time Sources</u>			
College fund balances			
Institutional Strategic Investment			
Gift Funding			
Other Items (attach description)			
Total One-time	\$ -	\$ -	\$ -
TOTAL SOURCES	\$ 67,270	\$ 171,530	\$ 327,370
EXPENDITURE ITEMS			
<u>Continuing Expenditures</u>			
Faculty	33,750	45,000	45,000
Other Personnel		6,000	12,000
Employee Related Expense	10,463	15,810	17,670
Graduate Assistantships			
Other Graduate Aid			
Operations (materials, supplies, phones, etc.)			
Additional Space Cost			
Other Items (attach description)			
Total Continuing	\$ 44,213	\$ 66,810	\$ 74,670
<u>One-time Expenditures</u>			
Construction or Renovation			
Start-up Equipment		2,500	
Replace Equipment			
Library Resources			
Other Items (attach description)			
Total One-time	\$ -	\$ 2,500	\$ -
TOTAL EXPENDITURES	\$ 44,213	\$ 69,310	\$ 74,670
Net Projected Fiscal Effect	\$ 23,058	\$ 102,220	\$ 252,700

Undergraduate Major Peer Comparison Chart - select two peers for completing the comparison chart from (in order of priority) [ABOR-approved institutions](#), [AAU members](#), and/or other relevant institutions recognized in the field. The comparison chart will be used to identify typically required coursework, themes, and experiences for majors within the discipline. The comparison programs are not required to have the same degree type and/or major name as the proposed UA program. Information for the proposed UA program must be consistent throughout the proposal documents.

BA Design: Arts and Practices

The BA in Design Arts and Practices is different than the comparison programs as it is interdisciplinary. It is also different in that there are two paths that a student can focus their degree (Print or Screen). The UA of ASU both require 120 units where UCLA required 180. The BA in Design Arts and Practices required a minor.

Program name, emphasis (sub-plan) name (if applicable), degree, and institution	Proposed UA Program: Design: Arts & Practices	Peer 1: ASU Digital Culture (Arts and Design Studies), BA	Peer 2: UCLA The Design Media Arts (DMA)
Current # of enrolled students		385 (4 in Arts and Design Studies)	180
Major Description. Includes the purpose, nature, and highlights of the curriculum, faculty expertise, emphases (sub-plans; if any), etc.	The Design Arts & Practices (DAP) degree will provide you the opportunity to develop a foundation in design thinking and making from an interdisciplinary perspective that you will be able to apply to a career in fields such as Experience and User Interface Design, Product Design, Industrial Design, Information Design, Graphic Design / Desktop Publishing, Interior and Spatial Design, Set and Exhibition Design, Environmental and Fashion Design, Art / Illustration, Multimedia Design / Animation, Art Direction, Web Design. This major is a great fit for you if you are passionate about art, design, and information and how they come together and are applied to making a better world. In this interdisciplinary degree you will be able to take classes from the School of Art and the School of Information (Arizona's iSchool). DAP students will develop core conceptual and technical skills to design artifacts and experiences across a range of scales and media. Project-based courses will build your abilities in problem solving and seeking, innovating with and through technologies, and developing creative visual strategies to address problems (climate change, social justice issues, representation and identity, education, limited water supplies, wildfires in local community, understanding information). History, theory, and academic courses will construct cultural frameworks for depth and breadth in research and	From: https://webapp4.asu.edu/programs The BA program in digital culture equips students with the technical skills they need to create computational media and the ability to know when or why to apply them. Students learn to create computational media, which is computation combined with objects, sound, video, time, space, culture and bodies; breathe behavior into media, objects or systems by programming; and think critically about how computation impacts lives and how culture makes a difference in how people experience computational media, a critical skill in this dynamic age. Armed with skills and sound judgment, graduates work in cultural communication, marketing, design, social media, health, education, entertainment and creative arts, and all areas in which culture is shaped by technology and computational media. All students gain techniques to change the world and communicate using contemporary computational media, a vital power in the 21st-century. Some go on to invent fresh techniques.	From: http://dma.ucla.edu/undergrad/program/ The Design Media Arts (DMA) undergraduate program emphasizes innovative creation with digital and mass media within the context of a public research university. The curriculum features a solid foundation in form, color, space, motion, typography, and interactivity, followed by a broad selection of area studies courses in video, visual communication, network media, game design, and narrative. The program culminates with the Senior Projects classes where each student defines their own senior project based on individual interests within the areas of interactivity and games, video and animation, and visual communication and image. This uniquely challenging and diverse program invites students to balance aesthetic sensibility with logical reasoning, formal theories with practical application, and contemporary thought with historical perspective. Most courses are taught as studios of no more than 22 students, which encourages individual growth and fosters a

	<p>application. Courses across Art, Design, Information Studies and Technology in distinct, interdisciplinary ways will shape your degree plan moving from foundations and skills over the first two years, to theories and issues, and a culminating capstone project. Capstone projects will be developed through transdisciplinary lenses, and will tackle challenges spanning fields from Social Justice, Design and the Environment..</p>	<p>The digital culture program with a concentration in arts and design studies is for students wishing to integrate transdisciplinary studies in design and the arts into new media applications.</p> <p>Students complement their knowledge of new media with broad-based transdisciplinary studies in design and the arts.</p>	<p>sense of community within the department.</p> <p>Rather than focusing on narrow professional development, our curriculum fosters experimentation across a range of different media. We privilege a social outlook, process, experimentation, and personal growth over conservatism and commercialism and we search for students who share the same goals. We strive to provide a broad education that encourages young people to make new connections, to analyze complex situations, and to think critically.</p>
Target careers	<ul style="list-style-type: none"> • Set / Exhibit Designer • Graphic Designer • Desktop Publisher • Interior Designer • Industrial Designer • Fashion Designer • Artist • Illustrator, • Multimedia Designer • Animator • Art Director • Web Designer 	<ul style="list-style-type: none"> - 3D modeling and fabrication - audio and video - engineering - graphic design - illustration - iOS development - journalism - programming - software engineering - special effects - visual media 	<ul style="list-style-type: none"> • Graphic Designer • Game Designer • Video Editor • Web Designer • UX/UI Designer • 3D, VR/AR Designer • Marketing
Total units required to complete the degree	120	120	180
Upper-division units required to complete the degree	42	45	64
Foundation courses			
Second language	4th Semester Proficiency	Second Language Requirement: No	2 nd semester proficiency
Math	<p>G-Strand Earning credit for:</p> <ul style="list-style-type: none"> • LING 123 Introduction to Mathematical Approaches to Language • MATH 105 Mathematics in Modern Society 	First Required Math Course: MAT 210 - Brief Calculus	<p>Quantitative Reasoning Requirement (complete 1 of the following)</p> <ul style="list-style-type: none"> • Biostatistics 100A or 100B • Life Sciences 20 or 30A or 30B or 40 • Mathematics 2 or 3A or 31A or 31AL

	<ul style="list-style-type: none"> • PHIL 110 Logic and Critical Thinking • PSY 230 Psychological Measurement and Statistics <p>OR, earning credit for:</p> <ul style="list-style-type: none"> • Any 3-unit (or more) mathematics course numbered above Math 105 • achieving a math placement code equivalent to that of students who have completed UA College Algebra-by the end of the student's first semester at the UA 		<ul style="list-style-type: none"> • Philosophy 31 • Political Science 6 or 6R • Program in Computing 10A or 10B or 10C • Public Affairs 60 • Statistics 10 or 12 or 13
Pre-major? (Yes/No). If yes, provide requirements. Provide email(s)/letter(s) of support from home department head(s) for courses not owned by your department.	No	No	No
List any special requirements to declare or gain admission to this major (completion of specific coursework, minimum GPA, interview, application, etc.)	Minimum GPA of 2.00	All Digital Culture majors must have a minimum 3.00 Digital Culture GPA at the end of Term 2 to continue in the program.	**Entry Level Writing (if applicable) and Writing I must be completed by the end of the first year; Writing II must be completed by the end of the second year.
Major requirements			
Minimum # of units required in	52	79	90

<p>the major (units counting towards major units and major GPA)</p>			
<p>Minimum # of upper-division units required in the major (upper division units counting towards major GPA)</p>	<p>33</p>	<p>42</p>	<p>60</p>
<p><u>Minimum # of residency units to be completed in the major</u></p>	<p>31</p>	<p>30</p>	<p>60</p>
<p>Required supporting coursework (courses that do not count towards major units and major GPA, but are required for the major). Courses listed must include prefix, number, units, and title. Include any limits/restrictions needed (house number limit,</p>	<p>None</p>	<p>None</p>	<p>None</p>

<p>etc.). Provide email(s)/letter(s) of support from home department head(s) for courses not owned by your department.</p>			
<p>Major requirements. List all major requirements including core and electives. If applicable, list the emphasis requirements for each proposed emphasis. Courses listed count towards major units and major GPA. Courses listed must include prefix, number, units, and title. Mark new coursework (New). Include any limits/restrictions</p>	<p>MAJOR CORE:</p> <p><u>3 Units Foundation: History + Theory</u> ART 119 (3) Contemporary Art and Theory</p> <p><u>6 Units Foundation: Practice</u> Complete 6 units of the following options: ART 100A (2) Mapping ART 100B (2) Space ART 100C (2) Gaze ART 100D (2) Experience ART 100E (2) Surface ART 100G (2) Propaganda</p> <p><u>16 Units Emphasis Core Areas</u> Complete 16 units from one of the following emphasis areas: Screen, Print</p> <p>SCREEN: ISTA 131 (3) Dealing with Data ART 265 (3) Design Studio I SBE 301 (4) Introduction to Design Thinking ART 306B (3) Basics of Animation ART 361A (3) Design for Web and Devices</p> <p>PRINT (visual) ART 265 (3) Design Studio I ART 266 (3) Illustration Studio I SBE 301 (4) Introduction to Design Thinking ART 363A (3) Typography ART 462F (3) Information Graphics</p> <p><u>6 Units Upper Division: History + Theory</u> Complete 6 units minimum from the following options ARH 370 (3) History of Design</p>	<p>ASU Roadmap link</p> <p>MAJOR CORE: 19 Units AME 111 (3) Introduction to Digital Culture AME 101 (1) ASU Digital Culture Experience AME 112 (3) Computational Thinking for Digital Culture AME 130 (3) Prototyping Dreams AME 230 (3) Programming for the Media Arts AME 485 (3) Digital Culture Capstone I AME 486 (3) Digital Culture Capstone II</p> <p>EMPHASIS CORE: 15 Units <u>Emphasis: Design Studies Core Course List</u> GRA 101 (3) Designing Life GRA 225 (3) Communication/Interaction Design Theory GRA 401 (3) Creative Environment IND 344 (3) Human Factors in Design INT 121 (3) Introduction to Computer Modeling for Interior Design (CS)</p> <p><u>Emphasis: The Arts Core Course List</u> ARA 489 (3) Writing Art and Design Criticism (L) ARS 102 (3) Art from Renaissance to Modernism (HU & H) HDA 210 (3) Creativity and Innovation in Design and the Arts HDA 252 (3) Foundations Arts and Design Entrepreneurship HDA 310 (3) Socially Engaged Practice</p> <p>EMPHASIS ELECTIVES: 3 Units <u>Emphasis: Design Studies Core Elective Course List</u> APH Upper Division Elective ARA 489 (3) Writing Art and Design Criticism GRA Upper Division Elective (3) IND Upper Division Elective (3) INT Upper Division Elective (3)</p>	<p>30 UNITS DESMA 8 (5) Media Histories DESMA 10 (5) Design Culture DESMA 21 (4) Drawing and Color DESMA 22 (4) Form DESMA 24 (4) Motion DESMA 25 (4) Typography DESMA 28 (4) Interactivity</p> <p>10 UNITS CORE LECTURE COURSES DESMA 101 (5) Media Arts: Introduction DESMA 104 (5) Design Futures</p> <p>30 UNITS CORE STUDIO COURSES: Complete six of seven courses DESMA 152 (5) Tangible Media DESMA 153 (5) Video DESMA 154 (5) Word + Image DESMA 156 (5) Three-Dimensional Modeling and Motion DESMA 157 (5) Game Design DESMA 161 (5) Network Media DESMA 163 (5) Narrative</p> <p>15 UNITS SPECIAL TOPICS: <i>Complete three of four courses</i> DESMA 160 (5) Special Topics in Design Media Arts DESMA 171 (5) Topics in Interactivity and Games DESMA 172 (5) Topics in Video and Animation DESMA 173 (5) Topics in Visual Communication and Image</p> <p>5 UNITS SENIOR PROJECT DESMA 159A (5) Capstone Senior Project: Interactivity and Games DESMA 159B (5) Capstone Senior Project: Video and Animation</p>

<p>needed (house number limit, etc.). Provide email(s)/letter(s) of support from home department head(s) for courses not owned by your department.</p>	<p>ARH 319 (3) Introduction to American Art ARH 321 (3) Introduction to Contemporary Art ARH 324 (3) Introduction to the History of Photography ARH 325 (3) History of Modern Architecture ARH 329 (3) Art History of the Cinema</p> <p><u>3 Units Upper Division: Major Core</u> ART 498 (3) DAP Capstone</p> <p><u>18 Units Transdisciplinary Electives:</u> Complete a minimum of 18 units of elective coursework in the major</p> <p>ART 254 (3) Screen Printing I ART 265 (3) Design Studio I ART 231 (3) 3D Animation * ART 237 (3) 3D Modeling ART 286 (3) Extended Media: Experimental and Combining Media ART 287 (3) Beginning Sculpture (NEW)ART 361B (3) User Experience Design / UX UI ART 306B (3) Basics of Animation ART 363A (3) Typography * ART 360 (3) Visualizing Justice ART 361 (3) Design for Web and Devices ART 386 (3) Extended Media: Combining Media and Installation Strategies ART 436A (3) Digital Authoring ART 438 (3) Digital Fabrication ART 462D (3) Motion ART 462E (3) Letterpress and the Multiple ART 462F (3) Information Graphics ART 486 (3) Extended Media: Experimental Media and Installation Strategies ART 496F (3) Design, Art and the Environment ESOC 211 (3) Collaborating in Online Communities ESOC 300 (3) Digital Storytelling & Culture ESOC 318 (3) Disruptive Technologies ESOC 340 (3) Information, Multimedia Design & the Moving Image ESOC 480 (3) Digital Engagement ISTA 130 (3) Computational Thinking and Doing ISTA 131 (3) Dealing with Data ISTA 251 (3) Introduction to Game Design ISTA 301 (3) Computing and the Arts ISTA 302 (3) Technology of Sound ISTA 401 (3) Designing Installations</p>	<p>LPH Upper Division Elective (3)</p> <p><u>Emphasis: The Arts Core Elective Course List</u> ALA 100 (3) Introduction to Environmental Design ALA 102 (3) Landscapes and Sustainability APH 300 (3) World Architecture I/Western Cultures APH 314 (3) History of Architecture II ARS 201 (3) Art of Asia ARS 202 (3) Art of Africa Oceania and the Americas DCE 201 (3) Dance Culture and Global Contexts DSC 101 (3) Design Awareness FMP 404 (3) World Cinema MUS 347 (3) Jazz in America THE 422 (3) Latinx Theatre and Film THE 423 (3) African American Theatre THE 426 (3) Pre-Columbian Theatre of the Americas</p> <p>HISTORY/THEORY COURSE LIST: 6 Units <i>Complete 6 credits from the following. Minimum # of upper division units: 3</i> ALA 100 (3) Introduction to Environmental Design (HU & H & G) ALA 102 (3) Landscapes and Sustainability (HU & G) APH 300 (3) World Architecture I/Western Cultures (HU & H & G) APH 313 (3) History of Architecture I ((L or HU) & G & H) APH 314 (3) History of Architecture II ((L or HU) & G & H) ARA 202 (3) Understanding Photographs ARS 102 (3) Art from Renaissance to Modernism (HU & H) ARS 345 (3) Art and Television ARS 394 (3) Anime ARS 438 (3) Art of the 20th Century I (HU & H) ARS 439 (3) Art of the 20th Century II (HU & H) DCE 300 (3) Moving Histories (HU) DSC 101 (3) Design Awareness (HU & G) FMP 294 (3) History of Film & Television Production FMP 403 (3) Independent Film (HU) FMP 405 (3) Film and Television (3) Pioneers Practices and Innovations (HU) GRA 111 (3) Graphic Design History I (HU) GRA 112 (3) Graphic Design History II IAP 304 (3) Traditions of the Avant-Garde and Experimental Art (L or HU) IAP 305 (3) 20th and 21st Century Art Performance and Media (L or HU) IND 316 (3) 20th-Century Design I (HU & H) IND 317 (3) 20th-Century Design II (HU & H) INT 111 (3) Interior Design Issues and Theories (HU) INT 310 (3) History of Interior Design I (HU & H) INT 311 (3) History of Interior Design II (HU & H) LPH 310 (3) History of Landscape Architecture (HU & H) LPH 311 (3) 20th-Century Landscape Architecture (HU)</p>	<p>DESMA 159C (5) Capstone Senior Project: Visual Communication and Image</p>
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	<p>ISTA 416 (3) Introduction to Human Computer Interaction LIS 475 (3) User Interface and Website Design SBE 201 (3) Sustainable Design and Planning SBE 480 (3) Research Methods</p>	<p>MUS 347 (3) Jazz in America (HU & C) MUS 354 (3) Popular Music (HU) MUS 356 (3) Broadway and the American Musical (HU) MUS 362 (3) Rap Music and Hip Hop Culture (HU & C) STS 303 (3) History of Science and Technology (H) THE 320 (3) History of the Theatre I (HU & H) THE 322 (3) Theatre History and Culture (HU & H)</p> <p>MEDIA ENGINEERING: 3 Units <u>Complete 3 credits from the following:</u> AME 410 (3) Interactive Materials AME 430 (3) Mac Development for Media Arts AME 435 (3) Mobile Development AME 470 (3) Programming for Social and Interactive Media EEE 307 (3) Signal Processing for Digital Culture</p> <p>ELECTIVES: 33 Units <u>Complete 33 units; broken down as:</u> (3) Lower Division Digital Culture Flexible Elective (12) Digital Media - Media Arts & Design OR Digital Culture Studies. Minimum # of upper division units: 6 units (12) Upper Division Digital Culture Studies (3) Upper Division Digital Culture Studies OR Related Digital Culture Course (3) Upper Division Related Digital Culture Course OR Upper Division Digital Media - Media Arts & Design</p> <p><u>Digital Culture Flexible Elective</u> AME OR MDC Lower Division Elective</p> <p><u>Digital Culture Studies Course List</u> AME 210 (3) Media Editing AME 220 (3) Programming for the Web AME 240 (3) Introduction to Physical Computing AME 244 (3) Introduction to Interactive Environments AME 294 (3) Circuit Bending AME 294 (3) Design Politics AME 294 (3) Soundscape Ecology AME 310 (3) Media Literacies and Composition AME 320 (3) Motion Capture for Integrative Systems AME 330 (3) Digital-Physical Systems AME 394 (3) Special Topics AME 411 (3) Advanced Interactive Sound AME 430 (3) Mac Development for Media Arts AME 435 (3) Mobile Development AME 444 (3) Media Installations AME 470 (3) Programming for Social and Interactive Media AME 494 (3) Special Topics ART 116 (3) Introduction to Digital Media ART 218 (3) 3D Tools ART 378 (3) Digital Textiles</p>	
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DCE 294 (3) Hybrid Action: Physical Intelligence in Digital Culture
 FSH 394 (3) Fashion Design & Wearable Technology
 MDC 211 (3) Introduction to Digital Sound
 MDC 311 (3) Composing and Performing for Hybrid Ensembles
 MDC 411 (3) Advanced Interactive Sound

Digital Media - Media Arts & Design Course List
 ART 116 (3) Introduction to Digital Media
 ART 206 (3) Digital Photography I
 ART 217 (3) Introduction to Computer Animation
 ART 218 (3) 3D Tools
 ART 308 (3) 2D Digital Animation
 ART 312 (3) Illustration
 ART 346 (3) 3-D Computer Imaging and Animation (CS)
 ART 348 (3) Animation Motion Studies
 ART 394 (3) Digital Photography for Non-Majors
 ART 424 (3) Stop Motion Animation
 ART 438 (3) Moving and Interactive Systems in Sculpture
 ART 440 (3) Experimental Video Art
 ART 494 (3) Documentary Video Art Visual Prototyping
 CIS 300 (3) Web Design and Development
 CPI 111 (3) Game Development I (CS)
 DCE 294 (3) Hybrid Action: Physical Intelligence in Digital Culture
 EDT 440 (3) Creating and Marketing Mobile Apps
 FMP 225 (3) Introduction to Visual Effects
 FMP 240 (3) Introduction to Animation for Film
 FMP 255 (3) Media Authorship (CS)
 FMP 294 (3) Sound Design: From Hollywood to Independent Film
 FMP 394 (3) Non-Linear Editing for Film and Media
 GIT 135 (3) Graphic Communications
 GIT 215 (3) Introduction to Web Authoring
 GIT 230 (3) Digital Illustration in Publishing
 GRA 294 (3) Illustrator
 GRA 294 (3) InDesign
 GRA 294 (3) Photoshop
 IAP 103 (3) Foundations I Interdisciplinary Digital Media
 IAP 104 (3) Foundations I Fundamentals of Sound Art
 IAP 322 (3) Multitrack Digital Recording
 IAP 361 (3) Digital Editing and Media Literacy (CS)
 IAP 364 (3) Documentaries
 IAP 394 (3) Motion Graphics & Animation
 IAP 462 (3) Games and Play
 MDC 311 (3) Composing and Performing for Hybrid Ensembles

Internship, practicum, applied course requirements (Yes/No). If yes, provide description.	No	No	No
Senior thesis or senior project required (Yes/No). If yes, provide description.	Yes. Complete 3 units: ART 498 (3) DAP Capstone	Yes. Complete 6 units: AME 485 (3): Digital Culture Capstone I AME 486 (3): Digital Culture Capstone II	Yes. Complete 5 units from 1 of the following: DESMA 159A (5) Capstone Senior Project: Interactivity and Games DESMA 159B (5) Capstone Senior Project: Video and Animation DESMA 159C (5) Capstone Senior Project: Visual Communication and Image
Additional requirements (provide description)	Yes, the following do not satisfy general education requirements: 6 units of Upper Division: History + Theory Students may not count any courses from their own emphasis area towards elective requirements.	All Digital Culture majors must have a minimum 3.00 Digital Culture GPA to meet graduation requirements.	Students are required to take 12 units of upper division non-major courses. (i.e. ARTS & ARC 100)
Minor (specify if optional or required)	Required	optional	Optional

*Note: comparison of additional relevant programs may be requested.

New Academic Program Request

University of Arizona

Name of Proposed Academic Program: Wellness and Health Promotion Practice BA						
Academic Department: Department of Health Promotion Sciences, Mel & Enid Zuckerman College of Public Health						
Geographic Site: UA Main, Tucson, AZ						
Instructional Modality: Department of Health Promotion Sciences						
Total Credit Hours: 120						
Proposed Inception Term: Fall 2021						
<p>Brief Program Description: In alignment with the mission of the Mel and Enid Zuckerman College of Public Health, the BA in Wellness and Health Promotion Practice will promote the health and wellness of communities across the southwest and globally. The major will offer students the opportunity to develop the knowledge, attitudes, ethics, skills, and supervised practice to provide professional services and interventions to culturally diverse and socioeconomically diverse populations across the lifespan that promotes healthy behaviors, healthy lifestyles, and wellness.</p>						
<p>Learning Outcomes and Assessment Plan:</p> <ol style="list-style-type: none"> 1) Students will assess the needs and the resources of diverse populations in practice settings to promote health and wellness. 2) Students will plan health promotion and wellness programs for implementation in practice settings. 3) Students will demonstrate effective communication skills that are essential to delivering wellness and health promotion programs or services. 4) Students will utilize evaluation skills in measuring wellness and health promotion outcomes. 5) Students will practice the application of ethical and professional standards in wellness and health promotion settings. <p>Assessment Plan: Course-embedded assessments measure student learning outcomes byway of exams, assignments, summative critical self-assessments, and faculty supervised practicum and internships. End of program surveys evaluate all five learning outcomes.</p>						
<p>Projected Enrollment for the First Three Years:</p> <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="padding: 5px;">Year 1</th> <th style="padding: 5px;">Year 2</th> <th style="padding: 5px;">Year 3</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">30</td> <td style="padding: 5px;">60</td> <td style="padding: 5px;">90</td> </tr> </tbody> </table>	Year 1	Year 2	Year 3	30	60	90
Year 1	Year 2	Year 3				
30	60	90				
<p>Evidence used to determine projected enrollment: This is projected from our enrollment numbers we achieved in the BS in Public Health along with the market demand presented in an earlier section. Once established and marketed we expect to attract 35 students per year into the program, the majority selecting to undertake this program at the University of Arizona vs ABOR peers (2 related at ASU) and non-ABOR peer institutions. These are also trends based on national movements for BA degrees in health education, health promotion and wellness, and data from the Bureau of Labor Statistics codes.</p>						

Evidence of Market Demand:

A market analysis for CIP Code 51.0001, Health and Wellness, General, was completed for Arizona and the United States. Within the state there were more than 800 job listing in the last 12 months in the first career outcome mapped—Community Health Worker, Health Educator/Coach. Nationwide there was more than 28,000 job listings. The dominant academic preparation (83%) for this job was “bachelor degrees” with the remaining 17% referencing less than bachelor’s degree or graduate degrees as qualifications. Most frequent sectors for these positions are Health Care and Social Assistance, Education Services, Finance and Insurance, and Public Administration; the greatest proportion of these jobs fall within for-profit businesses.

Similar Programs Offered at Arizona Public Universities:

Currently there are only two programs in the state mapped to the CIP Code 51.0001 occupation, both offered within the Arizona State University (ASU) System. From 2014-2018 there were 56 graduates between those two ASU programs.

New Resources Required? (i.e. faculty and administrative positions; infrastructure, etc.):

An additional undergraduate advisor/internship coordinator as well as faculty and teaching assistants as noted in the budget and Workflow form.

Program Fee/Differentiated Tuition Required? YES X NO Δ

Estimated Amount: Standard for College of Public Health undergraduate degrees at \$50 per unit.

Program Fee Justification: For some of our field courses there will be additional expenses related to background checks and logistics such as transportation to sites.


Specialized Accreditation? YES Δ NO X

Accreditor: Our students in the Health Education subplan will be prepared for the Certified Health Education Specialist (CHES) exam available through the National Commission for Health Education Credentialing.

BA Wellness & Health Promotion Curriculum Map

	Outcome				
	Outcome 1: Needs Assessment Students will assess the needs and the resources of diverse populations in practice settings to promote health and wellness.	Outcome 2: Planning Students will plan health promotion and wellness programs for implementation in practice settings.	Outcome 3: Communication Students will demonstrate effective communication skills that are essential to delivering wellness and health promotion programs or services.	Outcome 4: Evaluation Students will utilize evaluation skills in measuring wellness and health promotion outcomes.	Outcome 5: Ethical Practice Students will practice the application of ethical and professional standards in wellness and health promotion settings.
Major Courses					
HPS 178 Personal Health and Wellness	I	I			I
HPS 200 Introduction to Public Health	I			I	
PHP 2XX Diversity, Health and Wellbeing in Later Life	I		P/A		
PHP 322 Health Education Ethical Leadership					IPA
HPS 387 Health Disparities and Minority Health	I/P				I/P
HPS 403 Applications in Health Promotion: Behavioral Theories & Health	P/A	P/A	P/A	P/A	P/A
HPS 404 Fundamentals of Evaluation	P/A			P/A	P/A
EHS 425 A Public Health Lens to Climate Change			IPA		
HPS 4XX/5XX Stress Management for Health and Wellness	I	P	P		
Program-Level Assessment					
HPS 394 Practicum	A	A	A	A	A
HPS 493 Internship	A	A	A	A	A
Exit Survey Indirect Measure	A	A	A	A	A
Legend : I Introduced P Practiced A Assessed I/P Introduced/Practices P/A Practiced					

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 THE UNIVERSITY OF ARIZONA®			
BUDGET PROJECTION FORM			
Name of Proposed Program or Unit: BA Major (on campus) in Wellness and Health Promotion Practice			
Budget Contact Person: John Ehiri, PhD	Projected		
	1st Year 2021 - 2022	2nd Year 2022 - 2023	3rd Year 2023 - 2024
METRICS			
Net increase in annual college enrollment UG	30	60	90
Net increase in college SCH UG	360	720	1,620
Net increase in annual college enrollment Grad			
Net increase in college SCH Grad			
Number of enrollments being charged a Program Fee/credit			900
New Sponsored Activity (MTDC)			
Number of Faculty FTE	0.70	1.00	1.50
FUNDING SOURCES			
<u>Continuing Sources</u>			
UG RCM Revenue (net of cost allocation)	99,000	198,000	378,000
Grad RCM Revenue (net of cost allocation)			
Program Fee RCM Revenue (net of cost allocation)	-	-	45,000
F and A Revenues (net of cost allocations)			
UA Online Revenues			
Distance Learning Revenues			
Reallocation from existing College funds (attach description)			
Other Items (attach description)			
Total Continuing	\$ 99,000	\$ 198,000	\$ 423,000
<u>One-time Sources</u>			
College fund balances			
Institutional Strategic Investment			
Gift Funding	60,000	75,000	75,000
Other Items (attach description)			
Total One-time	\$ 60,000	\$ 75,000	\$ 75,000
TOTAL SOURCES	\$ 159,000	\$ 273,000	\$ 498,000
EXPENDITURE ITEMS			
<u>Continuing Expenditures</u>			
Faculty	91,000	130,000	195,000
Other Personnel		11,250	22,500
Employee Related Expense	28,210	43,788	67,425
Graduate Assistantships		28,832	57,663
Other Graduate Aid			
Operations (materials, supplies, phones, etc.)			
Additional Space Cost			
Other Items (attach description)			
Total Continuing	\$ 119,210	\$ 213,869	\$ 342,588
<u>One-time Expenditures</u>			
Construction or Renovation			
Start-up Equipment			
Replace Equipment			
Library Resources			
Other Items (attach description)			
Total One-time	\$ -	\$ -	\$ -
TOTAL EXPENDITURES	\$ 119,210	\$ 213,869	\$ 342,588
Net Projected Fiscal Effect	\$ 39,790	\$ 59,131	\$ 155,412



BUDGET PROJECTION FORM

Name of Proposed Program or Unit: BA Major (on line) in Wellness and Health Promotion Practice offered by the Department of Health Promotion Sciences

Budget Contact Person: John Ehiri, PhD

Projected

	1st Year 2021 - 2022	2nd Year 2022 - 2023	3rd Year 2023 - 2024	
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METRICS			
Net increase in annual college enrollment UG	15	40	70
Net increase in college SCH UG	180	480	930
Net increase in annual college enrollment Grad			
Net increase in college SCH Grad			
Number of enrollments being charged a Program Fee/credit			
New Sponsored Activity (MTDC)			
Number of Faculty FTE	0.30	0.50	1.00

Notes

FUNDING SOURCES

Continuing Sources

UG RCM Revenue (net of cost allocation)			
Grad RCM Revenue (net of cost allocation)			
Program Fee RCM Revenue (net of cost allocation)			
F and A Revenues (net of cost allocations)			
UA Online Revenues	64,800	172,800	334,800 \$360/credit
Distance Learning Revenues			
Reallocation from existing College funds (attach description)			
Other Items (attach description)			
Total Continuing	\$ 64,800	\$ 172,800	\$ 334,800

One-time Sources

College fund balances			
Institutional Strategic Investment			
Gift Funding	20,000		
Other Items (attach description)			
Total One-time	\$ 20,000	\$ -	\$ -
TOTAL SOURCES	\$ 84,800	\$ 172,800	\$ 334,800

EXPENDITURE ITEMS

Continuing Expenditures

Faculty	39,000	43,000	86,000
Other Personnel		6,750	11,250
Employee Related Expense	12,090	15,423	30,148
Graduate Assistantships			
Other Graduate Aid			
Operations (materials, supplies, phones, etc.)			
Additional Space Cost			
Other Items (attach description)			
Total Continuing	\$ 51,090	\$ 65,173	\$ 127,398

One-time Expenditures

Construction or Renovation			
Start-up Equipment			
Replace Equipment			
Library Resources			
Other Items (attach description)			
Total One-time	\$ -	\$ -	\$ -

TOTAL EXPENDITURES

\$ 51,090 \$ 65,173 \$ 127,398

Net Projected Fiscal Effect

\$ 33,710 \$ 107,628 \$ 207,403

Undergraduate Major Peer Comparison Chart - select two peers for completing the comparison chart from (in order of priority) [ABOR-approved institutions](#), [AAU members](#), and/or other relevant institutions recognized in the field. The comparison chart will be used to identify typically required coursework, themes, and experiences for majors within the discipline. The comparison programs are not required to have the same degree type and/or major name as the proposed UA program. Information for the proposed UA program must be consistent throughout the proposal documents. Delete **EXAMPLE columns** once ready to submit/upload.

Program name, emphasis (sub-plan) name (if applicable), degree, and institution	Proposed UA Program:	Peer 1:	Peer 2:
Current # of enrolled students		638	Unknown (multiple emails sent to program representatives without response)
<p>Major Description. Includes the purpose, nature, and highlights of the curriculum, faculty expertise, emphases (sub-plans; if any), etc.</p>	<p>In alignment with the mission of the Mel and Enid Zuckerman College of Public Health, the Bachelor of Arts in Wellness and Health Promotion Practice will promote the health and wellness of communities across the southwest and globally. The major in Wellness and Health Promotion Practice will offer students the opportunity to develop the knowledge, attitudes, ethics, skills, and supervised practice to provide professional services and interventions to culturally diverse and socioeconomically diverse populations across the lifespan that promotes healthy behaviors, healthy lifestyles, and wellness. For the purposes of this degree, wellness means a state of being in optimal health.</p>	<p>From: http://www.hhp.ufl.edu/about/academics/bs-heb/</p> <p>The Department of Health Education & Behavior, with a foundation in the social and biological sciences, focuses on health information and theory application. Students learn techniques to promote healthy lifestyle choices in individual and group settings, with special attention given to diversity and culturally appropriate health education methodologies. The undergraduate curriculum also provides an excellent foundation for health education and related graduate programs, as well as professional health programs such as nursing, medical school, physician assistant, occupational therapy and physical therapy. Certified Health Education Specialist (CHES): Students who successfully complete the bachelor’s degree can take the CHES exam — a national voluntary certification recommended by numerous health employers. The CHES designation after a health educator’s name is a highly recognized and valued indication of professional competency and commitment to continued professional development.</p> <p>Specializations:</p> <p><i>Community Health Promotion:</i> This specialization focuses on illness and disease prevention among special target groups within a particular community, with the ultimate goal of providing practical health information to diverse population groups through the use of behavioral interventions.</p> <p><i>Health Studies:</i> This specialization allows students to gain knowledge on a variety of health issues plaguing diverse population groups, while also providing the opportunity for students to complete required pre-requisite coursework for professional health programs. Students enrolled in this specialization plan to attend post-baccalaureate programs for medicine, dentistry, optometry, pharmacy, physician assistant, occupational therapy and physical therapy.</p>	<p>From: https://www.public-health.uiowa.edu/degree-programs-undergraduate/</p> <p>The BA degree provides students with a basic understanding of the five core public health knowledge areas: biostatistics, social and behavioral sciences, epidemiology, health policy and management, and occupational and environmental health sciences. The undergraduate public health curriculum was developed to address these competencies; students in either program will be prepared to enter the workforce or continue their education.</p>
Target careers	The graduates of the program will have the skills to promote wellness within themselves, among individuals, families and communities and in a variety of settings: in homes, communities, governmental organizations, businesses, health care centers, hospitals, schools, faith-based organizations and other non-governmental organizations.	<p>Career Opportunities:</p> <ul style="list-style-type: none"> • Local and state health departments • State or national government agencies • Voluntary and non-profit agencies • Corporate and hospital-based wellness centers • Employee wellness programs 	The B.A. program provides knowledge of the community and behavioral aspects of public health for students interested in working in: <ul style="list-style-type: none"> - health education - health communication - public health program development, - or public health policy in local, federal, or international governmental or nongovernmental agencies
Total units required to complete the degree	120	120	120
Upper-division units required to complete the degree	42	60	31
Foundation courses			

Second language	4 th semester proficiency	As a condition of admission to the university, students must complete two sequential courses of a foreign language in secondary school, 8-10 semester credits at the postsecondary level or document an equivalent level of proficiency.	Two options: 1) Fourth-level proficiency in one world languages 2) Second-level proficiency in two world languages
Math	3 units of math (Math 112 College Algebra or higher), M-Strand, and 3 units in biostatistics or related coursework	3 units of math and 3 units of statistics	3 units math
Pre-major? (Yes/No). If yes, provide requirements. Provide email(s)/letter(s) of support from home department head(s) for courses not owned by your department.	No	No	No ("Public Health Interest" in first year)
List any special requirements to declare or gain admission to this major (completion of specific coursework, minimum GPA, interview, application, etc.)	None	None	-12 units at Univ of Iowa -Complete CPH 1400 (3) Fundamentals of Public Health with B- or better -Complete CPH 1600 (3) Public Health Science: Inquire and Investigation in Public Health with a grade of B- or better -Minimum GPA of 2.75
Major requirements			
Minimum # of units required in the major (units counting towards major units and major GPA)	56	51	61
Minimum # of upper-division units required in the major (upper division units counting towards major GPA)	42	60	32
Minimum # of residency units to be completed in the major	18	30	30
Required supporting coursework (courses that do not count towards major units and major GPA, but are required for the major). Courses listed must include prefix, number, units, and title. Include any limits/restrictions needed (house number limit, etc.). Provide email(s)/letter(s) of support from home department head(s) for courses not owned by your department.	<p>Biostatistics -BIOS 376 (3) Intro to Biostatistics Or -BIOS 2xx (3) Statistical reasoning in public health (3)</p> <p>Literacy -ENG 101 & 102 (6) or equivalent</p> <p>Communication Skills Complete 1 of the following: -COMM 113 (3) Introduction to Small Group Communication -COMM 114 (3) Introduction to Interpersonal Communication -COMM 117 (3) Culture and Communication -COMM 119 (3) Public Speaking -COMM 209 (3) Introduction to Communication Technology (3) -COMM 313 (3) Communication and Public Relations - COMM 314 (3) Creative Professional Communication</p>	<p>Humanities Complete 2 of the following: ARH 2000 (3) Art Appreciation: American Diversity and Global Arts LIT 2000 (3) Introduction to Literature MUL 2010 (3) Experiencing Music PHI 2010 (3) Introduction to Philosophy THE 2000 (3) Theatre Appreciation</p> <p>Writing/Composition Complete 2 of the following: ENC1101 (3) Expository and Argumentative Writing ENC1102 (3) Argument and Persuasion ENC2210 (3) Technical Writing ENC2305 (3) Analytical Writing and Thinking ENC3246 (3) Professional Communication for Engineers ENC3254 (3) Professional Writing in the Discipline ENC3453 (3) Writing in the Health Professions ENC3459 (3) Writing in the Medical Sciences ENC3464 (3) Writing in the Social Sciences ENC3465 (3) Writing in the Law</p> <p>Electives Gen Ed International (3) AND 2 electives at 3000/4000 level</p> <p>Social and Behavioral Sciences Complete 2 of the following: AMH2020 (3) United States Since 1877 ANT2000 (3) General Anthropology ECO2013 (4) Principles of Macroeconomics POS2041 (3) American Federal Government PSY2012 (3) General Psychology SYG2000 (3) Principles of Sociology</p>	<p>Biology Complete 1 of the following: -BIOL 1140 (4) Human Biology -BIOL 1141 (4) Intro Animal Biology -BIOL 1411 (4) Found of Biology</p> <p>Social Behavioral Complete 1 of the following: -ANTH 2100 (3): Contemporary World Problems -ANTH 2164 (3) Culture, Health, and Healing for Future Health Professionals -COMM 1809 (3) Social Marketing Campaigns -GEOG 3110 (3) Geography of Health -GEOG 4770 (3) Environmental Justice -IS 2000 (3) Intro to International Studies -JMC 3116 (3) Media and Global Cultures -JMC 3150 (3) Media and Health -PHIL 2402 (3) Intro to Ethics -POLI 3111 (3) Am Public Policy -SOC 1022 (3) Social Justice and Social Welfare in US -SOC 2810 (3) Social Inequality</p>

		<p>Biological and Physical Sciences Complete 1 of the following: AST1002 (3) Discovering the Universe AST3018 (3) Astronomy and Astrophysics 1 AST3019 (3) Astronomy and Astrophysics 2 BOT2011C (4) Plant Diversity BSC2005 (3) Biological Sciences BSC2010 (3) Integrated Principles of Biology 1 CHM1020 (3) Chemistry for Liberal Arts CHM2045 (3) General Chemistry 1 CHM2046 (3) General Chemistry 2 CHM2051 (3) Honors General Chemistry2 CHM2096 (3) Chemistry for Engineers 2 ESC1000 (3) Introduction to Earth Science EVR2001 (3) Introduction to Environmental Science PHY2020 (3) Introduction to Principles of Physics PHY2048 (3) Physics with Calculus 1 PHY2049 (3) Physics with Calculus 2 PHY2053 (4) Physics 1 PHY2054 (4) Physics 2</p>	
<p>Major requirements. List all major requirements including core and electives. If applicable, list the emphasis requirements for each proposed emphasis. Courses listed count towards major units and major GPA. Courses listed must include prefix, number, units, and title. Mark new coursework (New). Include any limits/restrictions needed (house number limit, etc.). Provide email(s)/letter(s) of support from home department head(s) for courses not owned by your department.</p>	<p>Core Courses: HPS 178: Personal Health and Wellness (3) PHP 150C: Aging-Everyone is Doing It (3); New HPS 200: Introduction to Public Health (3) PHP 322: Health Education and Ethical Leadership (3) HPS 404: Fundamentals of Evaluation (3) EHS 425: A Public Health Lens to Climate Change (3) HPS 403: Applications in Health Promotion: Behavioral Theories & Health (3) HPS 4XX/5XX: Stress Management for Health and Wellness (3); New and Health (3)</p> <p>Elective Subplans (min 15 units)</p> <p>Subplan 1: Health and Wellness HPS 3XX: Motivational Interviewing (3); New SBS 301A: Foundations of Mindfulness (1) SBS 301B: Mindful Semester: Mindfulness-based Study Tools (1) SBS 301C: Mindful Semester: Mindfulness-based Movement (1) HPS 405: Biology in Public Health (3) HPS 495: Mindfulness in Public Health Practice (3) HPS 495: Enhancing Public Health Using the Nurtured Heart Approach (3) HPS 402: Corporate Wellness (3) NSC 320: Nutrition, Physical activity and Health promotion (3) NSC 311: A Systems Approach to Obesity Prevention (3) NSC 395B: Health Coaching (3) HPS4XX/5XX: Health and Wellness for Special Populations (3); New PHP 4XX/5XX: Tobacco Cessation and Coaching (3); New HPS 478/578: Public Health Nutrition (3) HPS 486/586: Adolescent Health (3) HPS 416/516: The World's Food and Health (3) PHPM 458: Health Care Marketing (3) HPS 412/512: Public Health Approaches to Mental Health Disorders in the US (3)</p> <p>Subplan 2: Aging and Population Health HPS 405: Biology in Public Health (3) HPS 3XX: Motivational Interviewing (3); New PHP 301: Intro to Gerontology/Aging (3)</p>	<p>Complete 6 critical-tracking courses All critical-tracking courses must be taken at the University of Florida</p> <ul style="list-style-type: none"> • APK 2100C (4) Applied Human Anatomy with Lab • APK 2105C (4) Applied Human Physiology with Lab • BSC 2005/BSC 2005L (3/1) Biological Sciences and associated Lab • MAC 1105 (3) Basic College Algebra or MAC 1140 (3) Precalculus Algebra or MAC 1147 (4) Precalculus Algebra and Trigonometry • PSY 2012 (3) General Psychology • STA 2023 (3) Introduction to Statistics 1 <p>Complete HSC specialization courses</p> <p><i>Community Health Promotion</i> Complete 6 of the following:</p> <ul style="list-style-type: none"> • HSC 3301 (3) Health Education in Elementary Schools • HSC 4133 (3) Human Sexuality Education • HSC 4134 (3) Emotional Health and Counseling • HSC 4143 (3) Drug Education • HSC 4174 (3) Behavioral and Environmental Determinants of Obesity • HSC 4232C (3) Exercise Therapy, Adapted Physical Activity and Health • HSC 4233 (3) Patient Health Education • HSC 4574 (3) Nutrition Education for Special Populations • HSC 4579 (3) Women's Health Issues • HSC 4593 (3) HIV/AIDS Education • HSC 4623 (3) Minority Health Issues • HSC 4624 (3) Trends in International Health • HSC 4663 (3) Community Health Methods in Injury Prevention and Control • HSC 4664 (3) Health Communications for Consumers • HSC 4694 (3) Worksite Health Promotion • HSC 4950 (3) Current Topics in Health Education <p><i>Health Studies</i> Complete 4 of the following:</p> <ul style="list-style-type: none"> • HSC3202 (3) Community and Environmental Health • HSC3301 (3) Health Education in Elementary Schools • HSC4133 (3) Human Sexuality Education • HSC4134 (3) Emotional Health and Counseling • HSC4143 (3) Drug Education • HSC4174 (3) Behavioral and Environmental Determinants of Obesity • HSC4232C (3) Exercise Therapy, Adapted Physical Activity and Health • HSC4574 (3) Nutrition Education for Special Populations • HSC4579 (3) Women's Health Issues 	<p>Public Health Core Courses -CPH 1050 (1) College of Public Health Direct Admit Seminar -CPH 1400 (3) Fundamentals of Public Health -CPH 1600 (3) Public Health Science: Inquiry and Investigation in Public Health -CPH 1800 (3) Social and Psychological Determinants of Health -CPH 2050 (1) Second-year Undergraduate Public Health Seminar -CPH 2400 (3) The US Health System in a Global Context -CPH 2600 (3) Intro to Public Health Methods -CPH 3050 (1) Third-year Undergraduate Public Health Seminar -CPH 3400 (3) Health, Work, and the Environment -CPH 3500 (3) Global Public Health -CHP 3700 (3) Methods for Program Implementation and Evaluation -CPH 4999 (3) Public Health Capstone: Practice of Evidence-Based Public Health</p> <p>BA Specific Core Requirements -CPH 3100 (3) Health Economics -CPH 3600:0001 (3) Applied Public Health Methods -CPH 3800 (3) Public Health Theories and Society -CPH 3900 (3) Foundations in Public Health Preparedness and Response</p> <p>Public Health Electives Choose 5: -CPH:2200 (2) Climageddon: Climate Change and Health -CPH:2220 (3) Building a Healthier Tomorrow: Public Health Methods to Minimize Disease and Pollutant Exposures -CPH:2230 (3) Finding Patient Zero: The Exploration of Infectious Disease Transmission and Pandemic Threats -CPH:3200 (3) Death at Work: Case Studies of Workplace Safety and Health -CPH:3210 (3) Nutrition in Public Health -CPH:3220 (3) Public Health as a Public Good: Economics and Decision Making in Public Health Systems -CPH:3230 (3) Human Genetics and Public Health -CPH:3240 (1) Global Health Today -CPH:4200 (3) Agriculture, Food Systems & Sustain -CPH:4210 (3) Making a Difference: Public Health Policy and Advocacy -CPH:4220 (3) Global Road Safety -CPH:4230 (3) Injury and Violence Prevention</p>

	<p>PHP 312: Health Promotion and Well-being in Later Life (3) PHP 436/536: Aging, Environment and Wellbeing (3) PHP 437/537: Management and Leadership in Long-term Care (3) HPS 412/512: Public Health Approaches to Mental Health Disorders in the US (3) PHP 4XX: Optimizing Well-being and Resilience for Older Adults (3) PHPM 458: Health Care Marketing (3) PHP 305: Public Health in the Digital Age (3) CHS/SOC 215: Sociology of Aging and Health (3) FSHD 413: Issues in Aging (3)</p> <p>Subplan 3: Health Education HPS 306: Drugs in Society (3) HPS 330: Human Sexuality (3) HPS 350: Principles of Health Education and Promotion (3) HPS 481: Health Education Intervention Methods (3) HPS 400: Contemporary Health Problems (3) HPS 449: Family Violence (3) PHP 305: Public Health in the Digital Age (3) HPS 495: Mindfulness in Public Health Practice (3) HPS 3XX: Motivational Interviewing (3); New HPS xxx: Tobacco Cessation and Coaching (3); New PHPM 458: Health Care Marketing (3) HPS 412: Public Health Approaches to Mental Health Disorders in the US (3) HPS 405: Biology in Public Health (3)</p>	<ul style="list-style-type: none"> • HSC4593 (3) HIV/AIDS Education • HSC4623 (3) Minority Health Issues • HSC4624 (3) Trends in International Health • HSC4663 (3) Community Health Methods in Injury Prevention and Control • HSC4664 (3) Health Communications for Consumers • HSC4694 (3) Worksite Health Promotion • HSC4950 (3) Current Topics in Health Education 	<p>-CPH:4250 (1) Field Experiences in Public Health</p>
<p>Internship, practicum, applied course requirements (Yes/No). If yes, provide description.</p>	<p>Yes</p> <p><u>HPS 3xx Practicum</u> (6; new course or equivalent). This practicum reflects faculty supervised group or individual field-based experiential learning experiences in wellness and health promotion.</p> <p><u>HPS 4xx Wellness and Health Promotion Practice Internship</u> (3; new course). The required internship reflects preceptor led (preceptor cannot be a primary HPS faculty member), faculty-engaged, experiential learning experiences.</p>	<p>Yes</p> <p>Satisfactory completion of the 15 credit health education internship HSC 4876 as indicated on the final performance appraisal.</p> <p>To be eligible students must:</p> <ul style="list-style-type: none"> • Have completed ALL courses and be eligible to graduate upon successful completion of the internship semester. This includes, but is not limited to, majors, minors/certificates, flex learning, general education, study abroad and prerequisites for graduate programs. • Have a UF, upper-division cumulative major and universal tracking GPA of at least a 2.0, with no I, N or NG grades or flags. • Have no deficit points. • Have all grades posted to UF transcript two weeks prior to starting internship. • Have submitted all internship materials by the deadlines set by their department and have been approved for internship. <p>Students can only register and attempt to successfully complete practicum (if required by major) and internship two times. If unable to successfully complete after two attempts the student may be dismissed from the program.</p> <p>Course Number and Title: HSC4876 Internship in Health Education Credit Hours: 15 credit hours (students enrolled in the Health Studies specialization may elect to complete a 6 credit hour internship)</p> <p>Time Commitment: 40 hours/week for 12 weeks (students enrolled in the Health Studies specialization who elect to complete a 6 credit hour internship will earn 20 hours/week)</p>	<p>Yes</p> <p>All students must successfully complete at least 1 of the following experiences. Note that 0 credits are listed since students are offered the opportunity to utilize volunteering, summer jobs, etc..</p> <p>-<u>Research</u>. One option is CPH 3999 (0-3) Undergraduate Research Experience in Public Health or CPH 4990 (0-3) Mentored Independent Undergraduate Research in Public Health (0-3)</p> <p>-<u>Internship</u>. One option is CPH 4850 (0-3) Undergraduate Public Health Internship</p> <p>-<u>Global learning</u>. One option is CPH 4750 (0-3) Undergraduate Global Learning in Public health</p> <p>-<u>Service learning</u>. One option is CPH 3750 (0-3) Undergraduate Service Learning in Public Health</p>

<p>Senior thesis or senior project required (Yes/No). If yes, provide description.</p>	<p>No</p>	<p>No</p>	<p>Yes CPH 4999 is a senior capstone. Students in their final year synthesize and apply knowledge through cumulative and integrative activities that serve as a capstone to their educational experience.</p>
<p>Additional requirements (provide description)</p>	<p>Courses that are in required or elective content and general education (e.g., PHPM 310; HPS 387; HPS 300; HPS150C1) cannot be counted toward the degree and general education requirements. Two exceptions are that HPS 178 may be counted towards the major and public health minor. BIOS 376, as supporting coursework in this proposed major, may be counted toward the population health data science minor.</p>	<p>HSC 4876 PREREQUISITES</p> <ul style="list-style-type: none"> • Grade of C or better in HSC3032 (Foundations of Health Education) and HSC4800 (Health Education Professional Development). <ul style="list-style-type: none"> ○ All students must enroll in HSC4800 the semester prior to internship semester (* fall residential interns must enroll in HSC4800 the spring term prior to internship semester). ○ It is in HSC4800 that pre-internship students receive detailed information about the HEB internship, as well as the required internship paperwork and associated deadlines. • Satisfactory completion of all academic requirements for graduation including all required credits within the major, all general education credits, and all University requirements. • Satisfactory submission of all required departmental and site-specific documentation in support of your internship application. • Formal approval from your intended internship site. 	<p>-All core courses must be completed prior to enrollment in CPH 4999</p>
<p>Minor (specify if optional or required)</p>	<p>Required. Any undergraduate minor offered at the University may be completed with this degree. However, if pursuing a Public Health minor, HPS 178 is the only course allowed to double dip for both major and minor requirements. Due to double dipping restrictions for required and content elective coursework, the most viable emphases areas for any students pursuing a public health minor for this major are in epidemiology (EPID) or environmental health science (EHS).</p>	<p>Optional</p>	<p>Optional</p>

*Note: comparison of additional relevant programs may be requested.

New Academic Program Request

University of Arizona

Name of Proposed Academic Program: Bachelor of Science Software Engineering	
Academic Department:	2303 - Electrical and Computer Engineering and 2302 - Systems and Industrial Engineering
Geographic Site: Main Campus (Tucson)	
Instructional Modality: In Person	
Total Credit Hours: 120 units	
Proposed Inception Term: Fall 2021	
<p>Brief Program Description:</p> <p>The Bachelor of Science in Software Engineering synergistically integrates proven engineering techniques and discipline with software development best practices that encompass all aspects of the software development lifecycle (SDLC). The curriculum includes core principles from systems engineering, electrical and computer engineering, and software engineering. The curriculum is based on a solid foundation of mathematics, including calculus, physics, and discrete math. The courses include software requirements analysis, design, code, integration, verification testing, and software project management. While there are some similarities between the Software Engineering degree program and UArizona's Computer Science degree program offered in the College of Science, there are also major differences. In Computer Science, students predominately focus on the programming fundamentals and theoretical applications of developing software. Software Engineering students, on the other hand, focus more on solving complex, multi-faceted/multi-disciplined engineering problems and product development.</p> <p>The Software Engineering curriculum prepares students to meet the ever-growing demands of commercial, industrial, and federal government job sectors. Relevant software methodologies, such as Agile development, automated testing using continuous integration, and SW DevOps (DevOps combines software development (Dev) and IT operations (Ops)) to increase software application velocity and service delivery, are also integral to the curriculum. Using these types of agile and adaptive approaches, students will be well suited for the many diverse opportunities in a rapidly growing and ever-evolving career in software engineering.</p> <p>The program has a firm engineering foundation, discovery-based education, and an experiential learning approach. As a part of the curriculum, students work on and complete projects in every semester of the program that emphasizes communication, teamwork, critical thinking, and professionalism. This program's flexibility allows students to design their course of study and select technical electives from a diverse pool of courses in software and computer engineering domains such as web and mobile applications, embedded systems, and other interdisciplinary areas.</p> <p>Software engineering students will acquire considerable software development skills, including: experience with multiple programming languages, data structure constructs, algorithm implementation, databases, operating systems, networking, embedded</p>	

systems, cloud computing, configuration management, software assurance, and the use of open-source software libraries/programs. Additionally, students in the Software Engineering degree program develop skills required to work on teams and with other engineering disciplines. These skills include the ability to design and develop creative software solutions that are integral to a variety of large-scale and complex systems. Software systems are typically multi-faceted and often include millions of lines of code with diverse origins or pedigrees developed by teams of software engineers. Graduates of the Bachelor's degree program in Software Engineering learn to use structured and well-defined engineering approaches to develop, evaluate, and maintain software-centric systems.

Learning Outcomes and Assessment Plan:

The proposed Software Engineering degree program has well defined student learning outcomes with a documented and effective process for periodic review and continuous improvement. The learning outcomes include both well-defined activities or problems that are either practical and have narrowly focused terms of scope, or broadly defined activities that are relatively complex, broad in scope, and involve a variety of resources (such as processes, materials, or techniques) used in innovative ways. The assessment plan regularly evaluates the extent to which the Student Learning Outcomes (SLO) are being attained. The results of these evaluations are systematically used as input for the program's continuous improvement actions.

The Software Engineering Curriculum map depicted in Figure 1 shows the required courses mapped to the seven ABET compliant SLOs. For each outcome, the figure indicates when each outcome is *Introduced*, *Practiced* and *Assessed* for the different courses that are part of the curriculum. As reflected in the figure, at least three different courses are mapped to each outcome. Furthermore, there are four or more courses that satisfy the outcome for many SLOs. Specific assessment measures and practices for SFWE courses will be established and evolve as new courses are developed, offered, and assessed.

Curriculum Map - Courses and Activities Mapped to BS Software Engineering

University of Arizona AMS » Sandboxes
Ingrid Novodvorsky Playspace

BS Software Engineering Curriculum Map

Courses and Activities Mapped to BS Software Engineering

Outcome							
ABET Outcome #1 An ability to identify, formulate, and solve complex engineering problems by applying principles of engineering, science, and mathematics.	ABET Outcome #2 An ability to apply engineering design to produce solutions that meet specified needs with consideration of public health, safety, and welfare, as well as global, cultural, social, environmental, and economic factors.	ABET Outcome #3 An ability to communicate effectively with a range of audiences.	ABET Outcome #4 An ability to recognize ethical and professional responsibilities in engineering situations and make informed judgments, which must consider the impact of engineering solutions in global, economic, environmental, and societal contexts.	ABET Outcome #5 An ability to function effectively on a team whose members together provide leadership, create a collaborative and inclusive environment, establish goals, plan tasks, and meet objectives.	ABET Outcome #6 An ability to develop and conduct appropriate experimentation, analyze and interpret data, and use engineering judgment to draw conclusions.	ABET Outcome #7 An ability to acquire and apply new knowledge as needed, using appropriate learning strategies.	
Courses and Learning Activities							
MATH 129 Calculus II	I						
ENGL 102 Composition II			P				
ECE 175/CSC 110 Computer Programming	IPA	IPA			IPA		
SFWE 201 Sophomore Colloquium				I/A			I
Basic Science Lab	I/P						
PHYS 141 Intro Mechanics	I						
ECE 274A Digital Logic	IPA	IPA			IPA		
ECE 275 Object Oriented Software		P/A					

Figure 1. Bachelor of Science in Software Engineering Curriculum Mapped to Student Learning Outcomes (1 of 2)

SIE 277 Object Oriented Design		P/A	P/A		P/A		
PHYS 241 Intro E & M	I						
MATH 243 Discrete Mathematics	I						
SIE 305 Probability & Statistics	I/A					I/A	
SFWE 301 Software Reqmnts. Analysis & Testing	IPA	IPA	I/P				
ECE 311 Engineering Ethics		I/A	I/A	I/A			
SFWE 304 Software Engineering Preceptor					P/A		
SFWE 302 Software Design Process		IPA	I/P			I/P	
CSC 345 Algorithms	IPA						
SFWE 401 Software Assurance & Security	IPA			I/A			
SFWE 403 Software Project & Process Mgt.		IPA	IPA	I/A	P/A		
ENGR 498A/B Senior Capstone		P/A	P/A		P/A	P/A	P/A
SFWE 402 Software Dev. Ops.					P/A	P/A	
SFWE 404 Software Engineering Preceptor					P/A		
Exit Survey Indirect Measure	A	A	A	A	A	A	A

Legend : I Introduced P Practiced A Assessed I/P Introduced/Practices

Last Modified: 12/07/2020 11:20:50 AM

Figure 1. Bachelor of Science in Software Engineering Curriculum Mapped to Student Learning Outcomes (2 of 2)

Existing SIE and ECE courses have well-established measures and assessment plans in place. Hence, those measures will be adhered to for the SWFE curriculum (refer the detailed Learning Outcomes Map and Assessment Plan section of this proposal).

A rubric will be created for each new SFWE course that identifies Criteria, Measures of Assessment, and an Achievement level rating for the different criteria/categories evaluated.

The Achievement levels include: “Exemplary,” “Satisfactory,” “Developing,” and “Unsatisfactory”. For new courses developed in the curriculum, a plan for identifying the sources of evidence and assessment measures will be developed as the courses are developed.

At the end of every semester, a team comprised of the SWFE instructor, and the SIE and ECE Undergraduate Studies Committees will score the rubric using the measures of assessment identified for the course. A Root Cause and Corrective action plan (RCCA) will be developed for any course that scores “Developing” or below. Assessment results are documented and formally maintained in a controlled location at the end of each semester and will be published on the UArizona Assessment website. The scores will be tracked over time to facilitate continuous improvement and ensure the corrective action plans remain effective from semester to semester, year to year.

In consultation with the Office of Instruction & Assessment, we plan to evaluate the overarching Software Engineering program after the first graduating class has completed the program, and every year thereafter. Using well-established processes for developing program outcomes, we will evaluate:

1. The extent to which the program outcomes meet the needs of our students at the time of graduation.
2. Assess how the degree and program outcomes meet the needs of industry.
3. Evaluate how the outcomes meet our program objectives for alumni shortly after their graduation.

We plan to:

1. Have an Academic Programs Assessment Committee to implement, maintain, and improve assessment tools for continuous improvement and to analyze assessment data and formulate recommendations for improving the program based on these analyses.
2. Review all educational objectives annually with the Software Engineering Advisory Council and the Student / Faculty Advisory Council.
3. Charge the ECE and the SIE Undergraduate Program Committees with ensuring that the curriculum provides students with the experience necessary to meet the Software Engineering Educational Objectives and Program Outcomes.
4. Review all educational objectives annually at the ECE and SIE Faculty retreats held before the Fall semester.

Figure 2 shows the overall flow diagram for the Software Engineering degree program's continuous improvement process, which follows a well-established process used by the Systems and Industrial Engineering Department.

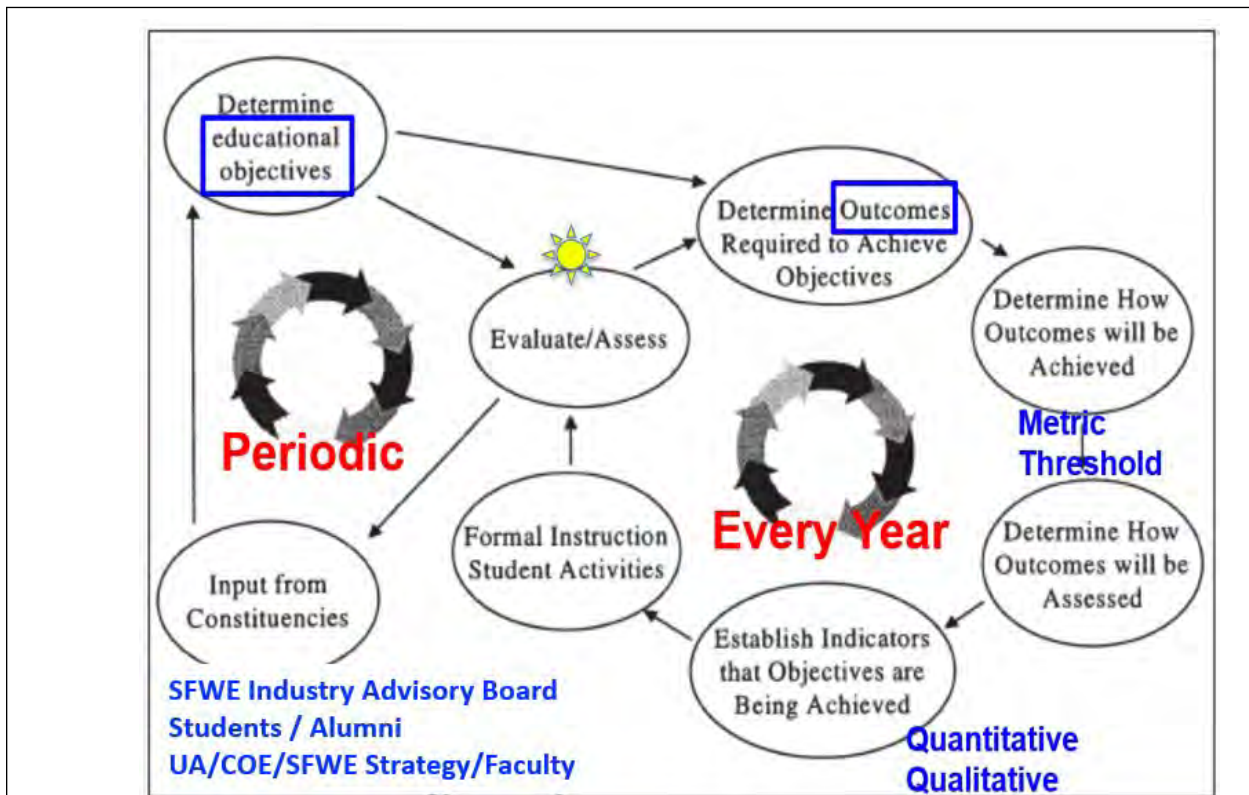


Figure 2. Software Engineering Degree Outcome Assessment and Continuous Improvement Process

Projected Enrollment for the First Three Years:

Table 1 below summarizes the full-time projected on campus enrollments in the Software Engineering degree program extrapolated out over the first 5 years, after which enrollment is anticipated to remain at a steady state. (Note: An online variant of the program is also planned to be offered beginning in Year 2, however the numbers reflected in Table 1 below only reflect ON-campus enrollments.)

Year 1	Year 2	Year 3	Year 4	Year 5
60	120	220	350	350

Table 1. Software Engineering Enrollment Projections

Evidence used to determine projected enrollment:

These numbers were estimated based on actual enrollments in similar software engineering degree programs at public universities as reported by the American Society for Engineering Education (ASEE) over the past five years as shown in Table 2 below:

University	Degree Name	2016 Full Time	2017 Full Time	2018 Full Time	2019 Full Time
Arizona State University	Software Engineering (B.S.)	528	512	552	563
Auburn University	Software Engineering (BSWE)	304	374	376	356
Brigham Young University - Idaho	Software Engineering	187	254	302	244
California Polytechnic State University, San Luis Obispo	Software Engineering (B.S.)	245	254	253	253
Iowa State University	Software Engineering (B.S.)	536	348	374	393
Mississippi State University	Software Engineering (B.S.)	129	124	127	145
San Jose State University	Software Engineering (B.S.)	203	500	525	518
The University of Texas at Arlington	Software Engineering (B.S.)	145	151	182	216
The University of Texas at Dallas	Software Engineering (BSSE)	281	315	397	392
University of California, Irvine	Software Engineering (B.S.)	189	176	190	194
University of Nebraska, Lincoln	Software Engineering (BSSE)	38	95	162	181
University of Wisconsin, Platteville	Software Engineering (B.S.)	198	184	217	194

Table 2. Software Engineering Enrollments at Comparative Universities

Evidence of Market Demand:

The Bureau of Labor Statistics reports the total number of Software Engineering jobs in 2010 to be 1.85M, and projects to over 2.4M in 2020; a 23% increase over ten years. U.S News & World Report ranked software developer/engineer as the best technology job in America.

In the past 12 months, Burning Glass reports that there was a total of 43,563 job postings for *Computer Software Engineering* (CIP = 14.0903) from 08/01/19 – 07/31/2020. As shown in Table 3 below, the number of jobs is expected to have a relatively high growth rate over the next 10 years.

GROWTH BY GEOGRAPHY

Geography	Selected Occupations	Total Labor Market	Relative Growth
Nationwide	15.46 %	4.24 %	High

Table 3. National Growth Projected in Software Engineering

The career outlook for software engineers has continued an upward trajectory for the past six years, as depicted in Figure 3 below:

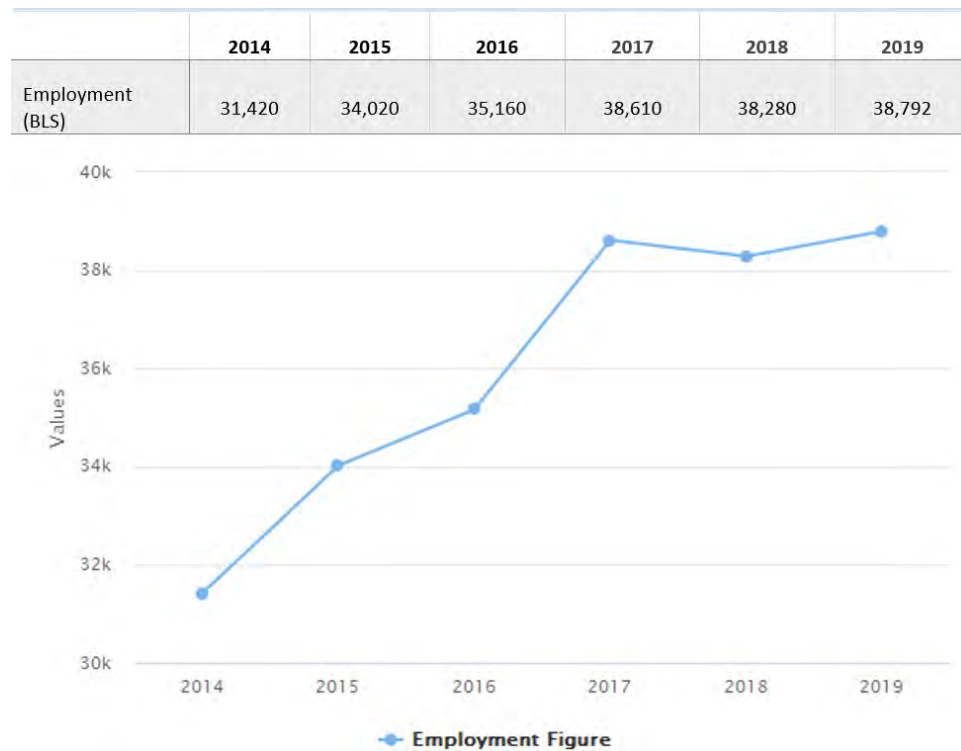


Figure 3. Career Outlook for Software Engineering over the Past 6 Years

Nationwide, the top locations posting requisitions for Software Engineers is shown in the Table 4 below:

Location	Postings
California	309,439
Texas	173,408
Virginia	114,302
New York	98,786
Florida	80,669
North Carolina	80,604
Illinois	68,747
Massachusetts	63,683
Georgia	62,505
Colorado	59,274

Table 4. Software Engineering Posting by State

Within the state of Arizona, the top employers hiring software engineers include the following (see Table 5):

TOP EMPLOYERS HIRING

Experience Level: All Experience

Employer	Postings	Market Share (%)
Raytheon	931	4.00%
USAA	765	3.29%
Wells Fargo	564	2.42%
General Dynamics	310	1.33%
Honeywell	304	1.31%
Northrop Grumman	299	1.28%
American Express	297	1.28%
Deloitte	288	1.24%
The Boeing Company	176	0.76%
Mitsubishi	169	0.73%
Anthem Blue Cross	154	0.66%
CVS Health	145	0.62%
IBM	132	0.57%
Viasat	126	0.54%
Amazon	120	0.52%

Table 5. Arizona Top Employers with Software Engineering Needs

The top 15 specialized software skills required by employers include a variety of programming languages, software engineering, Linux operating system, software project management, software DevOps, Scrum (a particular form of Agile), quality assurance, and systems engineering. The number of job postings and the anticipated growth in specific Software Engineering skill categories is summarized in Table 6, as shown below:

<i>Skill</i>	<i>Postings</i>	<i>Projected Growth</i>	<i>Salary Premium</i>	<i>Competitive Advantage</i>
<i>Java</i>	14112 (32%)	-13.18%	No	No
<i>Software Development</i>	11197 (26%)	5.78%	No	No
<i>SQL</i>	10788 (25%)	-13.3%	No	No
<i>Software Engineering</i>	7641 (17%)	7.27%	No	No
<i>JavaScript</i>	7611 (17%)	6.81%	No	No
<i>Python</i>	6560 (15%)	61.12%	No	No
<i>Linux</i>	5650 (13%)	-12.57%	No	No
<i>Microsoft C#</i>	5130 (12%)	-25.69%	No	No
<i>DevOps</i>	5048 (12%)	107.85%	Yes	No
<i>Project Management</i>	4706 (11%)	-19.74%	No	No
<i>Oracle</i>	4620 (11%)	-16.26%	No	No
<i>Quality Assurance</i>	4600 (11%)	39.46%	No	No
<i>Git</i>	4239 (10%)	59.81%	No	No
<i>Scrum</i>	4156 (10%)	39.96%	No	No
<i>Systems Engineering</i>	3740 (9%)	-4.85%	No	No

Table 6. Postings for the Top 15 Software Engineering Specialized Skills

The top 15 software engineering skill clusters are shown in Table 7 below:

Skill Postings	
<i>Software Development Principles</i>	19331 (44%)
<i>Java</i>	14291 (33%)
<i>System Design and Implementation</i>	13878 (32%)
<i>SQL Databases and Programming</i>	12479 (29%)
<i>JavaScript and jQuery</i>	10579 (24%)
<i>Software Quality Assurance</i>	8917 (20%)
<i>Operating Systems</i>	8518 (19%)
<i>Scripting Languages</i>	7644 (17%)
<i>Web Development</i>	7380 (17%)
<i>Software Development Methodologies</i>	7316 (17%)
<i>Business Process and Analysis</i>	7146 (16%)
<i>Database Administration</i>	7136 (16%)
<i>Microsoft Development Tools</i>	7056 (16%)
<i>Cybersecurity</i>	6963 (16%)
<i>Programming Principles</i>	6954 (16%)

Table 7. Postings for the Top 15 Software Engineering Skill Clusters

Similar Programs Offered at Arizona Public Universities:

There are 37 ABET accredited bachelor's level programs in Software Engineering, with 30 of these located in the United States. Arizona State University (ASU) has both an ABET accredited On-campus and an Online Software Engineering Bachelor's degree program in Arizona. In 2019, ASU had more than 1300 students enrolled in their program, of which ASEE classified 563 as full-time degree-seeking students. In 2019, ASU conferred 143 BS Software Engineering degrees.

In 2019, Embry-Riddle Aeronautical University in Prescott, AZ had 63 full-time students in their Software Engineering program and conferred six students with Software Engineering degrees.

The University of Arizona (UArizona) also offers a BS in Computer Science degree located in the College of Science. In 2019, there were 1626 students enrolled in the Computer Science program. While there are some similarities in the curriculum between a Computer Science program and a Software Engineering degree program, there are also significant differences. Software engineers are trained in all aspects of the software development lifecycle (SDLC), including requirements specification and analysis, software architecture / design, test planning and integration, verification / validation, and maintenance/support. The curriculum also includes key attributes of the overall engineering discipline that includes mathematics through calculus, physics, chemistry, product development, configuration management, quality assurance, safety, reliability, as well as the cost, schedule, and delivery pipeline of software. Software engineers develop software that is often part of a large, complex, and multi-disciplinary engineering product / system.

Other synergistic degree programs at UArizona include those offered by the School of Information (iSchool), Eller College of Management, and the College of Applied Science & Technology (CAST). The iSchool offers two related BS degrees in Information Science and Technology and Game Design and Development. The Eller College of Management offers a BS in Management Information Systems. CAST offers BS degrees in Applied Computing, Intelligence and Information Operations, and Computer Science. While some classes within these programs can potentially be electives within the Software Engineering degree program, there are significant differences between the curriculum and skillsets developed in all these programs.

New Resources Required? (i.e. faculty and administrative positions; infrastructure, etc.):

a. Library Acquisitions –

There are no anticipated additional library acquisition needs with the Software Engineering degree program.

b. Equipment/Physical Facilities –

At this time, there are no additional equipment / physical facility needs identified. Many of the tools and lab facilities used by this degree program already exist for other courses offered within the ECE and SIE departments. Many software development tools traditionally used for software engineering courses are “open source” and readily available for faculty and students to use at little to no charge. Cloud based resources, such as those offered through Amazon Web Services (AWS) or Microsoft Azure, can host integrated development environments for courses that require more comprehensive integrations of multiple tool types of toolsets to support student projects. If there are licenses or cloud-based resource usage fees that become necessary for different software engineering courses in the future, those costs could be included in course fees.

c. Additional Faculty/Staff

The additional required faculty for the Software Engineering degree program have been broken down into multiple categories, as is depicted in Table 8 and 9. Table 8 shows the academic year that the additional faculty will be recruited / hired over 5 years.

Projected Additional Resource Acquisition Plan (by Year) (On Campus Only)						
Resource Type	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	Total New Instructors Acquired Over 5 Years
Tenured Track Faculty	2	2	2	1	1	8
Professor of Practice	1	1	0	0	0	2
Adjunct	1	0	0	0	0	1

Table 8. Projected Additional Faculty Resources Acquisition Plan

Table 9 shows the accrued total of new faculty and other staff over 5 years. It is envisioned that the majority of the curriculum for the first year will be closely aligned to many of the other engineering degree programs. Hence for the first year of the degree offerir , new faculty can focus on developing the curriculum for the 2nd and 3rd years of the program. However, because a few of the curriculum courses are already very heavily populated courses, such as ECE 175 and Engr 102, additional faculty, TA and lab assistant resources will be required to help mitigate the increased demand.

Projected Additional Faculty and Staff Accrued over 5 Years					
Resource Type	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Tenured Track Faculty	2	4	6	7	8
Professor of Practice	1	2	2	2	2
Adjunct	1	1	1	1	1
UG Advisor	1	1	1	1	1
Other Staff	1	2	2	2	2

Table 9. Projected Additional Faculty and Staff Resources Accrued Over 5 Years

The required number of additional teaching assistants (TAs), graders, and lab assistants (LA) for the Software Engineering degree program have been broken down as shown in Table 1 . Because these resources are hired on a semester-by-semester basis only, the numbers shown in Table 9 reflect the total combined number of additional TA positions required over both semesters for the academic year (*i.e. Each table entry = Fall TA positions + Spring TA positions combined*).

Other Resources Required (semester hires only) (On Campus Only)					
Resource Type	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2026
TAs	4	8	12	20	25
Graders	1	3	4	12	11
Lab Assts	4	20	0	0	0

Table 10. Projected Additional Teaching Assistant, Graders, and Lab Assistant Positions for Each Academic Year (numbers reflect the total for both semesters combined)

Program Fee/Differentiated Tuition Required? YES NO

Estimated Amount: N/A

Program Fee Justification: N/A

Specialized Accreditation? YES NO

Accreditor: Accreditation Board for Engineering and Technology, ABET

Learning Outcomes and Assessment Plan:

The use and reporting of program assessment data to improve the quality of academic programs for students is required of all degree programs. Assessment should focus foremost on collecting data that will inform you about student learning that matters and should be viewed as a continuous source of knowledge for program and institutional improvement. A member of the [Assessment Team](#) in the Office of Instruction and Assessment must review and approve the student learning outcomes, curriculum maps, and process of assessment descriptions for all new programs.

Process of Assessment

The Process of Assessment section is for describing how faculty and staff will be involved in the development, implementation, and use of student learning outcomes. This section should include sufficient detail so that when new personnel are in place, the assessment can continue without interruption.

Your Process of Assessment:

The proposed Software Engineering degree program has well defined student learning outcomes with a documented and effective process for periodic review and continuous improvement. The learning outcomes include both well-defined activities or problems that are either practical and narrowly focused on terms of scope, or broadly defined activities that are relatively complex, broad in scope, and involve a variety of resources (such as processes, materials, or techniques) used in innovative ways. The assessment plan regularly evaluates the extent to which the Student Learning Outcomes (SLO) are being attained. The results of these evaluations are systematically used as input for the program's continuous improvement actions.

For the Software Engineering degree program, we plan to:

1. Have an Academic Programs Assessment Committee to implement, maintain, and improve assessment tools for continuous improvement and to analyze assessment data and formulate recommendations for improving the program based on these analyses.
2. Review all educational objectives annually with the Software Engineering Advisory Council and the Student / Faculty Advisory Council.
3. Charge the ECE and the SIE Undergraduate Program Committees with ensuring that the curriculum provides students with the experience necessary to meet the Software Engineering Educational Objectives and Program Outcomes.
4. Create an interdisciplinary committee with faculty from ENGR, CS, MIS, and the iSchool, to investigate opportunities for collaboration and course/project development that will strengthen the interdisciplinary nature of software and information-based systems
5. Review all educational objectives annually at the ECE and SIE Faculty retreats held before the Fall semester.

Figure 1 shows the overall flow diagram for the Software Engineering degree program's continuous improvement process, which follows a well-established process used by the Systems and Industrial Engineering Department.

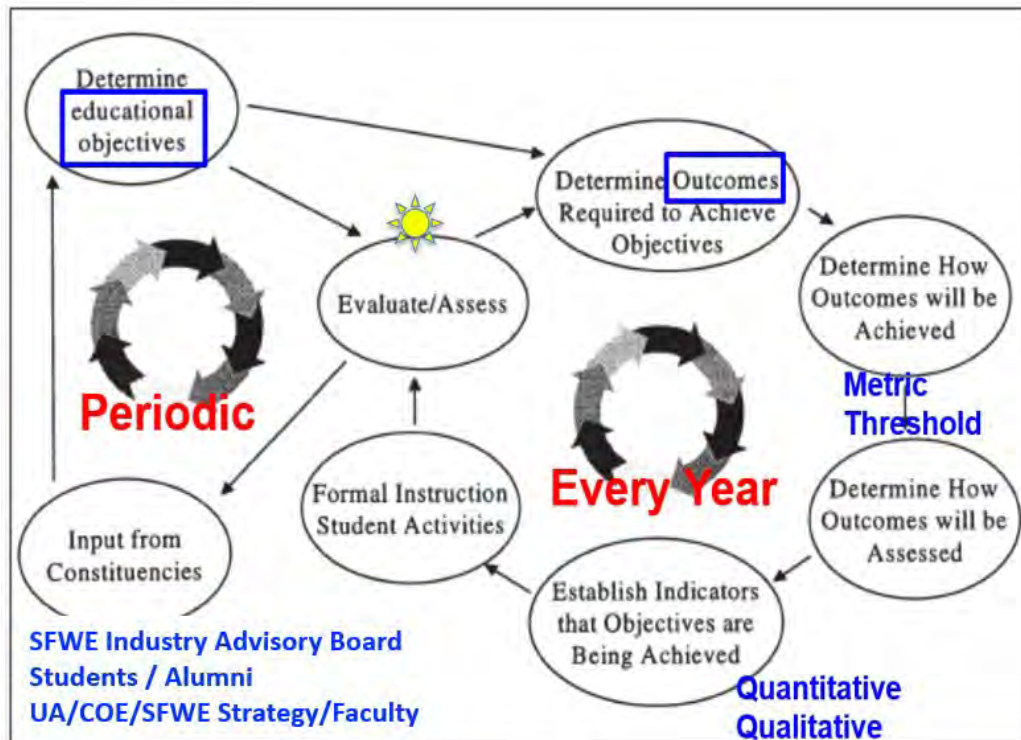


Figure 1. Software Engineering Degree Outcome Assessment and Continuous Improvement Process

As the student progresses through their academic program, there are three primary procedures in place to ensure that the student is making appropriate progress and attaining the required course grades for success:

1. SAAR (Student Academic Advising Report) (Student Advisement Report), an online record keeping database for which both student and advisor have access.
2. UAccess/Analytics Student Center, the academic course review conducted each semester by College and Department to determine performance (GPA of 2.0 or greater). At the end of each semester, students that are not meeting those requirements are considered “at-risk students” and an intervention is conducted. The Academic Program Coordinator contacts all at-risk students to set up meetings with the student, the Academic Program Coordinator, and appropriate SW Engineering faculty to create academic agreements; and
3. Senior Degree Check, required a semester prior to graduation.

Additionally, the College of Engineering conducts a CoE Senior Exit Survey for all engineering graduates. A SWFE Senior Exit Survey will be requested from all Software Engineering graduates which is specific to the SW Engineering courses and projects, and current and future career goals for each senior. The information from the survey will be an integral part of the annual SIE and ECE Engineering Undergraduate Committee (UGC) assessment and will be used to provide input and guidance to the continuous improvement activities for the Software Engineering degree.

In consultation with the Office of Instruction & Assessment, we plan to evaluate the overall Software Engineering program after the first graduating class has completed the program, and every year thereafter. Using well-established processes for developing program outcomes, we will evaluate:

1. The extent to which the program outcomes meet the needs of our students at the time of graduation.

2. Assess how the degree and program outcomes meets the needs of industry.
3. Evaluate how the outcomes meet our program objectives for alumni shortly after their graduation.

Learning Outcomes

Program student learning outcomes (SLOs) are clear, concise statements that describe how students can demonstrate their mastery of program goals. These statements identify the knowledge, skills, or attitudes that students will be able to demonstrate, represent, or produce upon successful completion of the program. Please list your learning outcomes:

Your Learning Outcomes (please number them):

Learning Outcome #	Learning Outcome Statement
1	<i>An ability to identify, formulate, and solve complex engineering problems by applying principles of engineering, science, and mathematics.</i>
2	<i>An ability to apply engineering design to produce solutions that meet specified needs with consideration of public health, safety, and welfare, as well as global, cultural, social, environmental, and economic factors.</i>
3	<i>An ability to communicate effectively with a range of audiences.</i>
4	<i>An ability to recognize ethical and professional responsibilities in engineering situations and make informed judgments, which must consider the impact of engineering solutions in global, economic, environmental, and societal contexts.</i>
5	<i>An ability to function effectively on a team whose members together provide leadership, create a collaborative and inclusive environment, establish goals, plan tasks, and meet objectives.</i>
6	<i>An ability to develop and conduct appropriate experimentation, analyze, and interpret data, and use engineering judgment to draw conclusions.</i>
7	<i>An ability to acquire and apply new knowledge as needed, using appropriate learning strategies.</i>

These Learning Outcomes match the ABET Learning Outcomes that are required for ABET accreditation.

Assessment Activities and Measures (Assessment Plan) and Curriculum Map

Assessment activities or measures should align with learning outcomes and clearly answer the question: How can we check that this learning outcome is being met by our students? Start by defining one [direct](#) and one [indirect](#) measure for each outcome. You do NOT need a separate assessment for each outcome; some assessments may measure more than one learning outcome. Once you have your measures identified for each outcome, contact the [Assessment Team](#) in the Office of Instruction and Assessment for the creation of your map in Taskstream. The team member will also review the rest of the assessment plan at this time.

The Software Engineering Curriculum map depicted in Figure 2 shows the required courses mapped to the seven ABET compliant Student Learning Outcomes (SLO). For each outcome, the figure indicates when each outcome is *Introduced*, *Practiced* and *Assessed* for the different courses that are part of the curriculum. As reflected in the figure, at least three different courses are mapped to each outcome. Further, there are four or more courses that satisfy the outcome for many SLOs. Existing SIE or ECE courses have well-defined assessment measures and assessment protocols in place. The assessment measures and practices for SFWE courses will be established and evolve as new courses are developed, offered, and assessed.

BS Software Engineering Curriculum Map

Courses and Activities Mapped to BS Software Engineering

	Outcome						
	ABET Outcome #1 An ability to identify, formulate, and solve complex engineering problems by applying principles of engineering, science, and mathematics.	ABET Outcome #2 An ability to apply engineering design to produce solutions that meet specified needs with consideration of public health, safety, and welfare, as well as global, cultural, social, environmental, and economic factors.	ABET Outcome #3 An ability to communicate effectively with a range of audiences.	ABET Outcome #4 An ability to recognize ethical and professional responsibilities in engineering situations and make informed judgments, which must consider the impact of engineering solutions in global, economic, environmental, and societal contexts.	ABET Outcome #5 An ability to function effectively on a team whose members together provide leadership, create a collaborative and inclusive environment, establish goals, plan tasks, and meet objectives.	ABET Outcome #6 An ability to develop and conduct appropriate experimentation, analyze and interpret data, and use engineering judgment to draw conclusions.	ABET Outcome #7 An ability to acquire and apply new knowledge as needed, using appropriate learning strategies.
Courses and Learning Activities							
MATH 129 Calculus II	I						
ENGL 102 Composition II			P				
ECE 175/CSC 110 Computer Programming	IPA	IPA			IPA		
SFWE 201 Sophomore Colloquium				I/A			I
Basic Science Lab	I/P						
PHYS 141 Intro Mechanics	I						
ECE 274A Digital Logic	IPA	IPA			IPA		
ECE 275 Object Oriented Software		P/A					

Figure 2. Bachelor of Science in Software Engineering Curriculum Mapped to Student Learning Outcomes (1 of 2)

SIE 277 Object Oriented Design		P/A	P/A		P/A		
PHYS 241 Intro E & M	I						
MATH 243 Discrete Mathematics	I						
SIE 305 Probability & Statistics	I/A					I/A	
SFWE 301 Software Reqmnts. Analysis & Testing	IPA	IPA	I/P				
ECE 311 Engineering Ethics		I/A	I/A	I/A			
SFWE 304 Software Engineering Preceptor					P/A		
SFWE 302 Software Design Process		IPA	I/P			I/P	
CSC 345 Algorithms	IPA						
SFWE 401 Software Assurance & Security	IPA			I/A			
SFWE 403 Software Project & Process Mgt.		IPA	IPA	I/A	P/A		
ENGR 498A/B Senior Capstone		P/A	P/A		P/A	P/A	P/A
SFWE 402 Software Dev. Ops.					P/A	P/A	
SFWE 404 Software Engineering Preceptor					P/A		
Exit Survey Indirect Measure	A	A	A	A	A	A	A

Legend :	I Introduced	P Practiced	A Assessed	I/P Introduced/Practices
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Figure 2 (Continued). Bachelor of Science in Software Engineering Curriculum Mapped to Student Learning Outcomes (2 of 2)

A rubric will be created for each new SFWE course that identifies Criteria, Measures of Assessment, and an Achievement level rating for the different criteria/categories evaluated. The Achievement levels will include: “Exemplary”, “Satisfactory”, “Developing”, and “Unsatisfactory”. For new courses developed in the curriculum, a plan for identifying the courses of evidence and assessment measures will be developed as the courses are developed.

An example rubric that could be adapted for the specific SFWE courses is shown in Figure 3 (*Note: this only exemplifies the intent of the rubrics to be developed, not the actual rubric*). At the end of every semester, a team comprised of the course instructor and the SIE and ECE UGCs, will score the rubric using the measures of assessment identified for the course. A Root Cause and Corrective action plan will be developed for any course that scores “Developing” or below. Assessment results are documented and formally maintained in a controlled location at the end of each semester and will be published at the UArizona Assessment website. The scores will be tracked over time to facilitate the Continuous Improvement and corrective action plans remain effective from semester to semester, year to year.

Outcome 1		An ability to identify, formulate and solve complex engineering problems by applying principles of engineering, science and mathematics.			
PI	Performance Indicators	UNSATISFACTORY	DEVELOPING	SATISFACTORY	EXEMPLARY
1a	Understanding of fundamental principles, concepts, and theory (e.g., governing equations, word equations)	Major lack in either the understanding of fundamental conceptual notions and/or theory in the topic at hand.	Grasps some concepts and an understanding of the theory. The student struggles to remember the main steps required in the derivation of important equations from basic principles.	Good grasp of most concepts and an understanding of the theory. The student understands the main steps required in the derivation of important equations from basic principles.	Mastery of the concepts and theory of the topic at hand. Ability to write precisely all the steps required in the derivations of fundamental equations.
1b	Mathematical formulation and model simplification of engineering problems	Inability to identify the basic principles involved and corresponding assumptions. The student can't write the model equations and/or its variables.	Lists some of the principles involved in a problem and corresponding assumptions. The student struggles to write the model equations and correctly identify the problem variables.	List of all principles involved in a problem and corresponding assumptions. The student is able to write the model equations and correctly identify the problem variables.	List of all principles involved in a problem and corresponding assumptions. Mathematical formulation is clean with clear explanation and identification of its variables (scalar, vector, matrix) and their relation to physical representation.
1c	Solution techniques (analytical and/or numerical)	Inability to identify an appropriate solution approach. Derivations and results contain unit inconsistencies. The unit inconsistencies are not explicitly identified.	Identifies but struggles to implement a proper solution technique. Some of the derivations are correct. Some of the results are presented with the correct units or recognized unit error. Struggles to identify unrealistic solutions.	Identification and implementation of proper solution technique. Most of the derivations are correct. Results are presented with the correct units or recognized unit error. Identification of unrealistic solutions.	Identification and implementation of proper solution technique. In the case of analytical problems, derivations are rigorous and symbolic. Numerical results are presented with an appropriate number of digits and correct units.
Outcome 2		An ability to apply engineering design to produce solutions that meet specified needs with consideration of public health, safety and welfare, as well as global, cultural, social, environmental and economic factors.			
	Performance Indicators	UNSATISFACTORY	DEVELOPING	SATISFACTORY	EXEMPLARY
2a	Ability to formulate a design problem for specified needs and technical requirements.	Fails to understand the design requirements and/or integrate them in the design problem.	Struggles with formulating a design problem that meets the specified needs and technical requirements.	Formulates the design problem based on understood requirements leading to a feasible design solution.	Ability to foresee potential challenges and identify multiple design formulations that will lead to feasible design solutions.
2b	Ability to identify disciplines, techniques, and tools for the solution of the design problem.	Does not know the basic relevant disciplines, techniques, and tools necessary as part of the design process.	Capable of identifying some of the disciplinary skills, techniques, and tools for solving the problem.	Broadly identifies disciplinary skills, techniques, and tools needed to obtain a design satisfying some of the requirements. Ability to identify and distribute tasks.	Clearly identifies specific disciplinary skills, techniques, and tools to obtain a design satisfying all of the requirements. Ability to identify and distribute tasks.
2c	Ability to account for non-technical factors (e.g., cost) and formulate or quantify societal impacts (e.g., pollution, safety)	Cannot foresee non-technical societal implications or integrate them in the formulation of the design problem.	Identifies some non-technical factors associated with the problem.	The student is able to formulate given societal impacts and non-technical consequences as constraints or objectives of the design problem.	Can formulate his/her own design problem combining technical and societal objectives and/or constraints.
Outcome 3		An ability to communicate effectively with a range of audiences.			
	Performance Indicators	UNSATISFACTORY	DEVELOPING	SATISFACTORY	EXEMPLARY

Figure 3. Example Rubric for Assessing Student Learning Outcomes (1 of 3)

3a	Oral communication. Ability to inform, persuade, and present results and conclusions.	Provides an unclear and unstructured and/or poorly formatted presentation. Does not respond effectively to questions.	Presents facts but lacks organization. Presentation materials are okay. Struggles to present persuading arguments.	Ability to present relevant technical information in a concise and organized way. Quality presentation materials. Ability to understand and answer questions (including acknowledgment of limitations). Able to convey a message to instructors and other students.	Clearly presents technical content in a concise and pedagogical way. High quality presentation materials. Ability to answer questions in a clear and concise way. Able to convey a message at a level outside the classroom (e.g., at technical conferences, industrial customers, general audience).
3b	Written communication. Ability to structure a technical document in a logical manner. Ability to produce professionally formatted documents.	Provides a disorganized and/or poorly formatted document.	Produces a document containing several formatting and grammatical errors.	Ability to present relevant technical information in an organized way. Presents in a proper format, the objectives, the hypotheses, the methods, results, and conclusions.	Ability to present relevant technical information in a structured narrative. Presents with a format of the highest quality, the objectives, the hypotheses, the methods, results, and conclusions.
3c	Ability to communicate through design iterations in response to client feedback.	Misunderstanding of the feedback and/or poor expression of the required design changes.	Responds to some of the feedback.	Clear understanding of the feedback and expression of the required design changes.	Clear understanding of the feedback and concise expression of the required design changes along with adequate justification.
Outcome 4		An ability to recognize ethical and professional responsibilities in engineering situations and make informed judgments, which must consider the impact of engineering solutions in global, economic, environmental and societal contexts.			
Performance Indicators		UNSATISFACTORY	DEVELOPING	SATISFACTORY	EXEMPLARY
4a	Understanding of responsibilities to stakeholders, teammates, and professional societies	Insufficient contributions.	Becoming aware of the stakeholders.	Fulfills the required tasks. Participates actively and make contribution on the team.	Clear understanding of responsibilities and highly proactive in fulfilling them.
4b	Ability to differentiate unethical and ethical behaviors.	Misses obvious ethical failures.	Starting to identify unethical behavior.	Reasonable explanation of an ethical behavior and actions.	Ability to identify specific actions addressing ethical concerns.
4c	Ability to make informed judgements considering consequences and liability.	Failure to identify obvious broader consequences.	Beginning to consider the consequences of their decisions.	Based on available information and data, ability to identify broader consequences.	Ability to identify broader consequences and provide recommendations to mitigate adverse consequences.
Outcome 5		An ability to function effectively on a team whose members together provide leadership, create a collaborative and inclusive environment, establish goals, plan tasks and meet objectives.			
Performance Indicators		UNSATISFACTORY	DEVELOPING	SATISFACTORY	EXEMPLARY
5a	Interaction with the group. Collegiality.	Uncooperative	Beginning to listen to others, but challenged to work together.	Ability to listen, respond, and compromise for the good of the project.	Proven interpersonal skills improving the cohesion of the group for improved efficacy and efficiency.
5b	Dependability	Unreliable	Completes some of the assigned tasks, but lacks consistency.	Carries out requested tasks fully and in a timely manner. Communicates progress on regular basis. Warns the group of potential delays and problems.	In addition to satisfactory criteria, demonstrates a willingness to assist other team members.

Figure 3 (Continued). Example Rubric for Assessing Student Learning Outcomes (2 of 3)

5c	Contributions to the team	Unengaged	Shares ideas with team, but struggles with engaging fully with the team.	Provides intellectual and leadership contributions as an active member of the team.	Provided intellectual and leadership contributions which markedly benefited the project.
Outcome 6		An ability to develop and conduct appropriate experimentation, analyze and interpret data, and use engineering judgment to draw conclusions.			
Performance Indicators		UNSATISFACTORY	DEVELOPING	SATISFACTORY	EXEMPLARY
6a	For given technical objectives, ability to identify a set of input and output quantities of interest and appropriate experiment(s).	Inability to identify appropriate tools/techniques (experimental or computational) and select parameters to test a technical objective such as a design requirement. Tends to attempt impractically complex solutions.	Struggles with identifying the tools and/or techniques needed to develop and conduct the appropriate experiments.	Ability to identify tools and/or techniques (experimental or computational) and select appropriate parameters to test a technical objective such as a design requirement.	Ability to test technical objectives (e.g., design requirements) in an efficient manner (e.g., avoids unnecessary complexity).
6b	Effectively carries out the appropriate experiment(s).	Unable to perform the relevant experiment without major assistance.	Developing an ability to identify the proper experiments.	With minor guidance, given the materials and equipment, ability to set up the experiments.	Full autonomy setting up the experiments given materials and equipment.
6c	Basic interpretation of the raw data and physical interpretation based on engineering judgment.	Does not provide error metrics and/or cannot relate the measurements to physical quantities. Does not identify meaningless results.	Beginning to apply statistical strategies to raw data. Starting to question inaccurate data.	Ability to process raw data, generate appropriate statistics, and identify outlier behaviors. Ability to relate statistics to physically-meaningful quantities and/or phenomena.	Ability to identify outlier behaviors and propose revisions to the experiment(s). Ability to relate statistics to physically-meaningful quantities and/or phenomena and understand their engineering implications.
Outcome 7		An ability to acquire and apply new knowledge as needed, using appropriate learning strategies.			
Performance Indicators		UNSATISFACTORY	DEVELOPING	SATISFACTORY	EXEMPLARY
7a	Ability to identify needed additional knowledge.	Failure to identify obvious limitations of in-class knowledge in the context of a particular problem (e.g., using linear theory in a nonlinear range).	Beginning to consider learning beyond the classroom.	For a given problem, successfully identify some needed additional knowledge to solve a problem beyond what is covered in the classroom (e.g., understand the underlying hypotheses and limitations of in-class techniques).	For a given problem, successfully identify <i>all</i> relevant additional knowledge to solve a problem beyond what is covered in the classroom.
7b	Ability to obtain appropriate information and tools beyond the classroom.	Failure to find appropriate information.	Developing a sense of when the classroom tools are lacking.	For a given problem, find required missing data. Also identify possible theories and tools, not covered in the classroom, that would enable a <u>correct solution</u> .	For a given problem, find required missing data. Thorough search for theories and tools, not covered in the classroom, and use judgement to assess their relevance.
7c	Ability to understand and apply knowledge obtained beyond the classroom.	Unable to understand and/or apply any new theories and/or tools.	Beginning to learn beyond the classroom.	Correctly use the newly found data. Understand and successfully apply at least one of the newly found theories and/or tools to a given problem with some guidance (e.g., through step by step approach).	Correctly use the newly found data. Thorough understanding and efficient application of the newly found theories and/or tools.

Figure 3 (Continued). Example Rubric for Assessing Student Learning Outcomes (3 of 3)

Table 1 delineates the sources of evidence, assessment measurements, and data collection points for each planned learning outcome. Since existing SIE and ECE courses already have well-established measures and assessment plans in place, those measures are specifically outlined in the table. For new courses developed in

the curriculum, a plan for identifying the sources of evidence and assessment measures is provided in the table.

Table 1. Learning Outcome 1 Assessment Measures and Data Collection Points

Learning Outcome 1:	<i>An ability to identify, formulate, and solve complex engineering problems by applying principles of engineering, science, and mathematics</i>	
Source of Evidence	Assessment Measures	Data Collection points
<p>For each course that contributes to this outcome, specific student artifacts will be evaluated and assessed. The sources of evidence can include:</p> <ul style="list-style-type: none"> - Class assignments - Exams - Course projects - Course reports - other forms of student work <p>For existing courses in the SW Engineering program, the evidence used to measure the effectiveness of the student outcome has been already been defined and will be followed.</p> <p>For new courses, the specific evidence used will be defined as the course is developed and re-evaluated as part of the continuous improvement activities for the new course.</p>	<p>ECE 175 and 274A: A rubric will be used to assess this student outcome. Specific sources of evidence will be identified in each course and used in the rubric based assessment. For each rubric category, a rating will be given commensurate with the rubric criteria rating scheme.</p> <p>SIE 305: Homework Assignment #10 for which 75% of the students must score 80% or higher.</p> <p>For SFWE 301 and SFWE 401, a rubric will be used to assess this student outcome. Specific sources of evidence will be identified in each course and used in the rubric based assessment. For each rubric category, a rating will be given commensurate with the rubric criteria rating scheme.</p> <p>Student self-assessment survey (used for indirect measures of the outcome).</p>	<ul style="list-style-type: none"> • End of each course • Assessment is planned annually, at a minimum

Table 1 (Continued). Learning Outcome 2 Assessment Measures and Data Collection Points

Learning Outcome 2:	<i>An ability to apply engineering design to produce solutions that meet specified needs with consideration of public health, safety, and welfare, as well as global, cultural, social, environmental, and economic factors</i>	
Source of Evidence	Assessment Measures	Data Collection points
<p>For each course that contributes to this outcome, specific student artifacts will be evaluated and assessed. The sources of evidence can include:</p> <ul style="list-style-type: none"> - Class assignments - Exams - Course projects - Course reports - other forms of student work <p>For existing courses in the SW Engineering program, the evidence used to measure the effectiveness of the student outcome has been already been defined and will be followed.</p> <p>For new courses, the specific evidence used will be defined as the course is developed and re-evaluated as part of the continuous improvement activities for the new course.</p>	<p>SIE 277: Semester Design Project for which 75% of the students must score 70% or higher.</p> <p>ENGR 498 A/B: 90% of the students must score 80% or higher (Average of SRD, PDR, & CDR) .</p> <p>ECE 175, 274A, 275, and ECE 311: A rubric will be used to assess this student outcome. Specific sources of evidence will be identified in each course and used in the rubric based assessment. For each rubric category, a rating will be given commensurate with the rubric criteria rating scheme.</p> <p>For SFWE 101, SFWE 301, SFWE 302, and SFWE 403, a rubric will be used to assess this student outcome. Specific sources of evidence will be identified in each course and used in the rubric based assessment. For each rubric category, a rating will be given commensurate with the rubric criteria rating scheme.</p> <p>Student self-assessment survey (used for indirect measures of the outcome).</p>	<ul style="list-style-type: none"> • End of each course • Assessment is planned annually, at a minimum

Table 1 (Continued). Learning Outcome 3 Assessment Measures and Data Collection Points

Learning Outcome 3:	<i>An ability to communicate effectively with a range of audiences</i>	
Source of Evidence	Assessment Measures	Data Collection points
<p>For each course that contributes to this outcome, specific student artifacts will be evaluated and assessed. The sources of evidence can include:</p> <ul style="list-style-type: none"> - Class assignments - Exams - Course projects - Course reports - other forms of student work <p>For existing courses in the SW Engineering program, the evidence used to measure the effectiveness of the student outcome has been already been defined and will be followed.</p> <p>For new courses, the specific evidence used will be defined as the course is developed and re-evaluated as part of the continuous improvement activities for the new course.</p>	<p>SIE 277: Semester Design Project for which 75% of the students must score 70% or higher.</p> <p>ECE 311: A rubric will be used to assess this student outcome. Specific sources of evidence will be identified in each course and used in the rubric based assessment. For each rubric category, a rating will be given commensurate with the rubric criteria rating scheme.</p> <p>ENGR 498 A/B: 90% of the students must score 80% or higher (Average of CDR and Final Report).</p> <p>For SFWE 403, a rubric will be used to assess this student outcome. Specific sources of evidence will be identified in each course and used in the rubric based assessment. For each rubric category, a rating will be given commensurate with the rubric criteria rating scheme.</p> <p>Student self-assessment survey (used for indirect measures of the outcome).</p>	<ul style="list-style-type: none"> • End of each course • Assessment is planned annually, at a minimum

Table 1 (Continued). Learning Outcome 4 Assessment Measures and Data Collection Points

Learning Outcome 4:	<i>An ability to recognize ethical and professional responsibilities in engineering situations and make informed judgments, which must consider the impact of engineering solutions in global, economic, environmental, and societal contexts</i>	
Source of Evidence	Assessment Measures	Data Collection points
<p>For each course that contributes to this outcome, specific student artifacts will be evaluated and assessed. The sources of evidence can include:</p> <ul style="list-style-type: none"> - Class assignments - Exams - Course projects - Course reports - other forms of student work <p>For existing courses in the SW Engineering program, the evidence used to measure the effectiveness of the student outcome has been already been defined and will be followed.</p> <p>For new courses, the specific evidence used will be defined as the course is developed and re-evaluated as part of the continuous improvement activities for the new course.</p>	<p>ECE 311: A rubric will be used to assess this student outcome. Specific sources of evidence will be identified in each course and used in the rubric based assessment. For each rubric category, a rating will be given commensurate with the rubric criteria rating scheme.</p> <p>For SFWE 101, SFWE 201, SFWE 401, SFWE 403, a rubric will be used to assess this student outcome. Specific sources of evidence will be identified in each course and used in the rubric based assessment. For each rubric category, a rating will be given commensurate with the rubric criteria rating scheme.</p> <p>Student self-assessment survey (used for indirect measures of the outcome).</p>	<ul style="list-style-type: none"> • End of each course • Assessment is planned annually, at a minimum

Table 1 (Continued). Learning Outcome 5 Assessment Measures and Data Collection Points

Learning Outcome 5:	<i>An ability to function effectively on a team whose members together provide leadership, create a collaborative and inclusive environment, establish goals, plan tasks, and meet objectives</i>	
Source of Evidence	Assessment Measures	Data Collection points
<p>For each course that contributes to this outcome, specific student artifacts will be evaluated and assessed. The sources of evidence can include:</p> <ul style="list-style-type: none"> - Class assignments - Exams - Course projects - Course reports - other forms of student work <p>For existing courses in the SW Engineering program, the evidence used to measure the effectiveness of the student outcome has been already been defined and will be followed.</p> <p>For new courses, the specific evidence used will be defined as the course is developed and re-evaluated as part of the continuous improvement activities for the new course.</p>	<p>SIE 277: Semester Design Project for which 75% of the students must score 70% or higher.</p> <p>ECE 175, and ECE 274A: a rubric will be used to assess this student outcome. Specific sources of evidence will be identified in each course and used in the rubric based assessment. For each rubric category, a rating will be given commensurate with the rubric criteria rating scheme.</p> <p>ENGR 498 A/B: 90% of the students must score 80% or higher (Average of TE (Fall) and TE (Spring)).</p> <p>For SFWE 101, SFWE 304, SFWE 402, SFWE 403 and SFWE 404, a rubric will be used to assess this student outcome. Specific sources of evidence will be identified in each course and used in the rubric based assessment. For each rubric category, a rating will be given commensurate with the rubric criteria rating scheme.</p> <p>Student self-assessment survey (used for indirect measures of the outcome).</p>	<ul style="list-style-type: none"> • End of each course • Assessment is planned annually, at a minimum

Table 1 (Continued). Learning Outcome 6 Assessment Measures and Data Collection Points

Learning Outcome 6:	<i>An ability to develop and conduct appropriate experimentation, analyze and interpret data, and use engineering judgment to draw conclusions</i>	
Source of Evidence	Assessment Measures	Data Collection points
<p>For each course that contributes to this outcome, specific student artifacts will be evaluated and assessed. The sources of evidence can include:</p> <ul style="list-style-type: none"> - Class assignments - Exams - Course projects - Course reports - other forms of student work <p>For existing courses in the SW Engineering program, the evidence used to measure the effectiveness of the student outcome has been already been defined and will be followed.</p> <p>For new courses, the specific evidence used will be defined as the course is developed and re-evaluated as part of the continuous improvement activities for the new course.</p>	<p>SIE 305: Homework Assignment #10 with 75% of the students must score 80% or higher</p> <p>ENGR 498 A/B: 90% of the students must score 80% or higher (Average of PDR and FAR).</p> <p>For SFWE 402, a rubric will be used to assess this student outcome. Specific sources of evidence will be identified in each course and used in the rubric based assessment. For each rubric category, a rating will be given commensurate with the rubric criteria rating scheme.</p> <p>Student self-assessment survey (used for indirect measures of the outcome).</p>	<ul style="list-style-type: none"> • End of each course • Assessment is planned annually, at a minimum

Table 1 (Continued). Learning Outcome 7 Assessment Measures and Data Collection Points

Learning Outcome 7:	<i>An ability to acquire and apply new knowledge as needed, using appropriate learning strategies</i>	
Source of Evidence	Assessment Measures	Data Collection points
<p>For each course that contributes to this outcome, specific student artifacts will be evaluated and assessed. The sources of evidence can include:</p> <ul style="list-style-type: none"> - Class assignments - Exams - Course projects - Course reports - other forms of student work <p>For existing courses in the SW Engineering program, the evidence used to measure the effectiveness of the student outcome has been already been defined and will be followed.</p> <p>For new courses, the specific evidence used will be defined as the course is developed and re-evaluated as part of the continuous improvement activities for the new course.</p>	<p>ENGR 498 A/B: 90% of the students must score 80% or higher (Average of PDR, CDR, and Final Report).</p> <p>Student self-assessment survey (used for indirect measures of the outcome).</p>	<ul style="list-style-type: none"> • End of each course • Assessment is planned annually, at a minimum



BUDGET PROJECTION FORM ON CAMPUS

Name of Proposed Program or Unit: Software Engineering

Budget Contact Person:	Projected		
	1st Year 2021 - 2022	2nd Year 2022 - 2023	3rd Year 2023 - 2024
METRICS			
Net increase in annual college enrollment UG	60	120	220
Net increase in college SCH UG	540	1,320	2,880
Net increase in annual college enrollment Grad	-	-	-
Net increase in college SCH Grad	-	-	-
Number of enrollments being charged a Program Fee (differential tuition) Lower division	60	120	160
Number of enrollments being charged a Program Fee (differential tuition) Upper division	-	-	60
New Sponsored Activity (MTDC)			
Number of Faculty FTE			
FUNDING SOURCES			
<u>Continuing Sources</u>			
UG RCM Revenue (net of cost allocation)	134,591.27	293,990.47	603,717.01
<i>Enrollment (calculation only - included in UG RCM Revenue)</i>	<i>42,444.70</i>	<i>80,447.47</i>	<i>145,743.44</i>
<i>SCH (calculation only - included in UG RCM Revenue)</i>	<i>92,146.57</i>	<i>213,543.00</i>	<i>457,973.57</i>
Grad RCM Revenue (net of cost allocation)	15,193	32,556	49,919
Program Fee RCM Revenue (net of cost allocation) Lower division	39,427.54	78,312.31	104,059.96
Program Fee RCM Revenue (net of cost allocation) Upper division			78,855.07
F and A Revenues (net of cost allocations)		122,154	244,309
UA Online Revenues			
Distance Learning Revenues			
Reallocation from existing College funds (attach description)			
Other Items (attach description)			
Total Continuing	\$ 189,211	\$ 527,013	\$ 1,080,859
<u>One-time Sources</u>			
College fund balances			
Institutional Strategic Investment			
Gift Funding			
Other Items (attach description)			
Total One-time	\$ -	\$ -	\$ -
TOTAL SOURCES	\$ 189,211	\$ 527,013	\$ 1,080,859
EXPENDITURE ITEMS			
<u>Continuing Expenditures</u>			
Faculty	180,000	360,000	540,000
Other Personnel	192,100	342,660	306,180
Employee Related Expense	112,586	205,107	260,104
Graduate Assistantships	66,761	133,521	200,282
Other Graduate Aid			
Operations (materials, supplies, phones, etc.)	140,500	140,500	140,500
Additional Space Cost			
Other Items (attach description)			
Total Continuing	\$ 691,947	\$ 1,181,788	\$ 1,447,066
<u>One-time Expenditures</u>			
Construction or Renovation			
Start-up Equipment			
Replace Equipment			
Library Resources			
Other Items (attach description)	800,000	800,000	800,000
Total One-time	\$ 800,000	\$ 800,000	\$ 800,000
TOTAL EXPENDITURES	\$ 1,491,947	\$ 1,981,788	\$ 2,247,066
Net Projected Fiscal Effect	\$ (1,302,735)	\$ (1,454,775)	\$ (1,166,207)

Note: This worksheet contains the information for a combined On Campus and Online offerings of the Software Engineering degree program, extrapolated over the first 5 years. The first year reflects the projections for On Campus only. The current plan is to develop the Online program offering during the first year the On campus program is offered, and begin offering an Online variant in the 2nd year, 2022-2023.



BUDGET PROJECTION FORM ON CAMPUS and Online

Name of Proposed Program or Unit: Software Engineering

Budget Contact Person:	Projected					
	1st Year 2021 - 2022	2nd Year 2022 - 2023	3rd Year 2023 - 2024	4th Year 2024 - 2025	5th Year 2025 - 2026	
METRICS						
Net increase in annual college enrollment UG	60	120	220	350	350	
Net increase in college SCH UG	540	1,320	2,880	5,230	5,790	
Net increase in annual college enrollment Grad	-	-	-	-	-	
Net increase in college SCH Grad	-	-	-	-	-	
Online SCH	270	660	1,440	2,615	2,895	
Number of enrollments being charged a Program Fee (differential tuition) Lower division	60	120	160	230	190	
Number of enrollments being charged a Program Fee (differential tuition) Upper division	-	-	60	120	160	
New Sponsored Activity (MTDC)						
Number of Faculty FTE						
FUNDING SOURCES						
<u>Continuing Sources</u>						
UG RCM Revenue (net of cost allocation)	134,591.27	293,990.47	603,717.01	1,041,155.92	1,127,068.13	
Enrollment (calculation only - included in UG RCM Revenue)	42,444.70	80,447.47	145,743.44	227,277.96	226,998.73	
SCH (calculation only - included in UG RCM Revenue)	92,146.57	213,543.00	457,973.57	813,877.96	900,069.40	
Grad RCM Revenue (net of cost allocation)	15,193	62,941	115,030	180,141	206,186	
Program Fee RCM Revenue (net of cost allocation) Lower division	39,427.54	78,312.31	104,059.96	149,058.28	122,711.83	
Program Fee RCM Revenue (net of cost allocation) Upper division			78,855.07	156,624.61	208,119.93	
F and A Revenues (net of cost allocations)		122,154	244,309	366,463	427,540	
UA Online Revenues	103,680	253,440	552,960	1,004,160	1,111,680	
Distance Learning Revenues						
Reallocation from existing College funds (attach description)						
Other Items (attach description)						
Total Continuing	\$ 292,891	\$ 810,838	\$ 1,698,931	\$ 2,897,603	\$ 3,203,306	
<u>One-time Sources</u>						
College fund balances						
Institutional Strategic Investment						
Gift Funding						
Other Items (attach description)						
Total One-time	\$ -	\$ -	\$ -	\$ -	\$ -	
TOTAL SOURCES	\$ 292,891	\$ 810,838	\$ 1,698,931	\$ 2,897,603	\$ 3,203,306	
EXPENDITURE ITEMS						
<u>Continuing Expenditures</u>						
Faculty	180,000	360,000	540,000	630,000	720,000	Added other personnel for online
Other Personnel	192,100	359,160	471,180	618,540	616,620	Added ERE for online
Employee Related Expense	112,586	210,222	311,254	380,412	408,270	Added TA's for online
Graduate Assistantships	66,761	250,352	450,634	700,986	801,127	
Other Graduate Aid						
Operations (materials, supplies, phones, etc.)	140,500	140,500	140,500	133,000	133,000	
Additional Space Cost						
Other Items (attach description)						
Total Continuing	\$ 691,947	\$ 1,320,234	\$ 1,913,568	\$ 2,462,938	\$ 2,679,017	
<u>One-time Expenditures</u>						
Construction or Renovation						
Start-up Equipment						
Replace Equipment						
Library Resources						
Other Items (faculty start up costs)	800,000	800,000	800,000	400,000	400,000	
Total One-time	\$ 800,000	\$ 800,000	\$ 800,000	\$ 400,000	\$ 400,000	
TOTAL EXPENDITURES	\$ 1,491,947	\$ 2,120,234	\$ 2,713,568	\$ 2,862,938	\$ 3,079,017	
Net Projected Fiscal Effect	\$ (1,199,055)	\$ (1,309,396)	\$ (1,014,637)	\$ 34,665	\$ 124,289	

These tables represent the additional resources for the On Campus Program ONLY

Projected Additional Resource Acquisition Plan (by Year) (On Campus Only)						
Resource Type	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	Total New Instructors Acquired Over 5 Years
Tenured Track Faculty	2	2	2	1	1	8
PoP (On Campus)	1	1	0	0	0	2
Adjunct	1	0	0	0	0	1

Note: The table to the left shows the year and number of additional resources that we intend to ACQUIRE in that year. Should be used to account for start-up costs only.

Projected Additional Salaries by Year (On Campus Only)					
Resource Type	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Tenured Track Faculty	2	4	6	7	8
Professor of Practice	1	2	2	2	2
Adjunct	1	1	1	1	1
UG Advisor	1	1	1	1	1
Other Staff	1	2	2	2	2

Note: The table to the left shows the total number of additional salaried employees required each year. The numbers in this table are cumulative and extend out over each year.

Other Resources Required (semester hires only) (On Campus Only)					
Resource - additional in pe	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2026
TAs	4	8	12	20	25
Graders	1	3	4	12	11
Lab Assts	4	20	0	0	0

*Note: The table to the left shows the total number of semester hires required each year. For example, in year 2025-2026, there are a total of 25 TA positions for the entire school year above and beyond what we currently have in 2020-2021. These numbers should be multiplied * the 1 semester TA costs (~16K), NOT a full year TA costs.*

These tables represent the additional resources for both the combined On Campus Program and the Online Program

Projected Additional Resource Acquisition Plan (by Year) (On Campus + Online)						
Resource Type	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	Total New Instructors Acquired Over 5 Years
Tenured Track Faculty	2	2	2	1	1	8
PoP (On Campus)	1	1	0	0	0	2
Professor of Practice (Online)	0	0	2	2	0	4
Adjunct (On Campus)	1	0	0	0	0	1
Adjunct (Online)	0	1	1	0	0	2

Note: The table to the left shows the year and number of additional resources that we intend to ACQUIRE in that year. Should be used to account for start-up costs only.

Projected Additional Salaries by Year (On Campus + Online)					
Resource Type	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Tenured Track Faculty	2	4	6	7	8
PoP (On Campus)	1	2	2	2	2
PoP (Online)	0	0	2	4	4
Adjunct (On Campus)	1	1	1	1	1
Adjunct (Online)	0	1	2	2	2
UG Advisor	1	1	1	1	1
Other Staff	1	2	2	2	2

Note: The table to the left shows the total number of additional salaried employees required each year. The numbers in this table are cumulative and extend out over each year.

Other Resources Required (semester hires only) (On Campus + Online)					
Resource Type	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2026
TAs (On Campus)	4	8	12	20	25
TAs (Online)	0	7	15	22	23
Graders (On Campus)	1	3	4	12	11
Graders (Online)	0	0	0	0	0
Lab Assts (On Campus)	4	20	0	0	0
Lab Assts (Online)	0	0	0	0	0

*Note: The table to the left shows the total number of semester hires required each year. For example, in year 2025-2026, there are a total of 25 TA positions for the entire school year above and beyond what we currently have in 2020-2021. These numbers should be multiplied * the 1 semester TA costs (~16K), NOT a full year TA costs.*

Operating Expenses

Category	FY Cost	Explanatory Notes
Dept. Travel	\$25,500	Dept travel, student travel awards
Events/Conferences	\$15,000	Dept events, conferences NACADA,
Office Supplies	\$5,000	
Other Operating Expen	\$75,000	Lab support, visa support, graduation support, phones, equipment
Recruitment	\$15,000	Faculty recruitment
Student group support	\$5,000	Seminar and Department Visitor
Total	\$140,500	

	FY21	FY22	FY23	FY24	FY25
SCH Calculation					
UG	261	250	247	243	244
UG tax rate	31.96%	31.96%	31.96%	31.96%	31.96%
Strategic Investment tax rate	2.66%	3.33%	3.66%	4.00%	4.33%
Total	170.64	161.78	159.02	155.62	155.45

Removed the 25.25% tax charged by COE per Larry

Head Count					
Enrollment /HC	1082	1036	1029	1014	1018
UG tax rate	31.96%	31.96%	31.96%	31.96%	31.96%
Strategic Investment tax rate	2.66%	3.33%	3.66%	4.00%	4.33%
Total	707	670	662	649	649

Lower Division Differential Tuition					
DT	450	450	450	450	450
Fin Aid 14%*	63	63	63	63	63
	387	387	387	387	387
Admin and Institutional Cost Diff/Program Fee 12.78%	49	49	49	49	49
	338	338	338	338	338
Strategic Investment tax rate	9	11	12	14	15
TOTAL (per semester)	329	326	325	324	323

Upper Division Differential Tuition					
DT	900	900	900	900	900
Fin Aid 14%*	126	126	126	126	126
	774	774	774	774	774
Admin and Institutional Cost Diff/Program Fee 12.78%	99	99	99	99	99
	675	675	675	675	675
Strategic Investment tax rate 2.66%	18	22	25	27	29
TOTAL (per semester)	657	653	650	648	646

Data pulled from the RCM projection

Online SCH Revenue	600
Retained at the University (36%)	216
Balance to COE (64%)	384

Graduate Tuition Modeling Sheet

Instructions: Enter data in cells with this peach fill

Student	Residency	One Semester Tuition	RC Waiver	Tuition Paid	Tuition Less	% SCH in ENGR	RA FTE
					Financial Aid		
A	Resident	5,969	5,858	-	-	100%	none
B	Resident	5,969		5,969	5,133	100%	0.5
C	Resident	5,969	-	5,969	5,133	100%	0.25 or 0.33

Assessments

12.78% Support Center Expense Recovery (SCER)
2.66% Strategic Investment Tax (SI)

0.75	Enrollment						Net Revenue to Dept
	75% Allocation of Tuition Paid Enrollment	RC Waiver Add Back	Allocated Net (Less Fin Aid)	RC Waiver Expense	SCER (12.78%)	SI (2.66%)	
Student A	-	4,394	4,394	(5,858)	187	39	(1,238)
Student B	3,850.01	-	3,850	-	(492)	(102)	3,256
Student C	3,850.01	-	3,850	-	(492)	(102)	3,256

0.25	SCH					Net Revenue to Dept
	25% Allocation of Tuition Paid SCH in ENGR	RC Waiver Add Back	Allocated Net (Less Fin Aid)	SCER (12.78%)	SI (2.66%)	
Student A	-	1,465	1,465	(187)	(39)	1,238
Student B	1,283	-	1,283	(164)	(34)	1,085
Student C	1,283	-	1,283	(164)	(34)	1,085

Total Net Revenue	Percentage of Tuition received by Dept	
Student A	-	0%
Student B	4,341	73%
Student C	4,341	73%
Total	8,682	

This worksheet contains information required to compute the On Campus program offering requirements for additional personnel.

	Year 1	Year 2	Year 3	Year 4	Year 5
Tenured Track Fault	180000	180000	180000	90000	90000
ERE	55800	55800	55800	27900	27900
		180000	180000	180000	90000
		55800	55800	55800	27900
			180000	180000	180000
			55800	55800	55800
				180000	180000
				55800	55800
					180000
					55800
Total Salary	180000	360000	540000	630000	720000
Total ERE	55800	111600	167400	195300	223200
Professor of practice	66000	66000	66000	66000	66000
ERE	20460	20460	20460	20460	20460
		66000	66000	66000	66000
		20460	20460	20460	20460
Total Salary	66000	132000	132000	132000	132000
Total ERE	20460	40920	40920	40920	40920
Adjunct (2 courses)	16500	16500	16500	16500	16500
ERE	5115	5115	5115	5115	5115
Total Salary	16500	16500	16500	16500	16500
Total ERE	5115	5115	5115	5115	5115
UG Advisor	50000	50000	50000	50000	50000
ERE	15500	15500	15500	15500	15500
Total Salary	50000	50000	50000	50000	50000
Total ERE	15500	15500	15500	15500	15500
Staff	50000	50000	50000	50000	50000
ERE	15500	15500	15500	15500	15500
		50000	50000	50000	50000
		15500	15500	15500	15500
Total Salary	50000	100000	100000	100000	100000
Total ERE	15500	31000	31000	31000	31000
Total Graders	1920	5760	7680	23040	21120
Total ERE	42.24	126.72	168.96	506.88	464.64
Total Lab Assistants	7680	38400			
Total ERE	168.96	844.8			
Overall	192100	342660	306180	321540	319620
ERE	112586	205107	260104	288342	316200
Total	551447	1041288	1306566	1573685	1773073

	Year 1	Year 2	Year 3	Year 4	Year 5
Teaching Assistant	38600	77200	115800	193000	241250
ERE	4284.6	8569.2	12853.8	21423	26778.75
Tuition	23876	47752	71628	119380	149225
Total	66760.6	133521.2	200281.8	333803	417253.75
	4	8	12	20	25
Num Fac F&A	2	4	6	7	8
	\$ 139,414	\$ 278,827	\$ 418,241	\$ 487,948	
Research \$	\$ 400,000	\$ 800,000	\$ 1,200,000	\$ 1,400,000	\$ 1,600,000
	\$ 260,586	\$ 521,173	\$ 781,759	\$ 912,052	\$ 1,042,345
	\$ 139,414	\$ 278,827	\$ 418,241	\$ 487,948	\$ 557,655

This worksheet contains information required to compute the Online program offering requirements for additional personnel.

New

	Year 1	Year 2	Year 3	Year 4	Year 5
Tenured Track Fauct	180000	180000	180000	90000	90000
ERE	55800	55800	55800	27900	27900
		180000	180000	180000	90000
		55800	55800	55800	27900
			180000	180000	180000
			55800	55800	55800
				180000	180000
				55800	55800
					180000
					55800

Total Salary	180000	360000	540000	630000	720000
Total ERE	55800	111600	167400	195300	223200

Professor of practice	66000	66000	66000	66000	66000
ERE	20460	20460	20460	20460	20460
		66000	66000	66000	66000
		20460	20460	20460	20460

Total Salary	66000	132000	132000	132000	132000
Total ERE	20460	40920	40920	40920	40920

Adjunct (2 courses)	16500	16500	16500	16500	16500
ERE	5115	5115	5115	5115	5115

Total Salary	16500	16500	16500	16500	16500
Total ERE	5115	5115	5115	5115	5115

UG Advisor	50000	50000	50000	50000	50000
ERE	15500	15500	15500	15500	15500

Total Salary	50000	50000	50000	50000	50000
Total ERE	15500	15500	15500	15500	15500

Staff	50000	50000	50000	50000	50000
ERE	15500	15500	15500	15500	15500
		50000	50000	50000	50000
		15500	15500	15500	15500

	Year 1	Year 2	Year 3	Year 4	Year 5
Teaching Assis	38600	77200	115800	193000	241250
ERE	4284.6	8569.2	12853.8	21423	26778.75
Tuition	23876	47752	71628	119380	149225
Total	66760.6	133521.2	200281.8	333803	417253.75

	4	8	12	20	25
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	Year 2	Year 3	Year 4	Year 5	Year 6
Num Fac	2	4	6	7	8
F&A	\$ 139,414	\$ 278,827	\$ 418,241	\$ 487,948	\$ 557,655
Research \$	\$ 400,000	\$ 800,000	\$ 1,200,000	\$ 1,400,000	\$ 1,600,000
	\$ 260,586	\$ 521,173	\$ 781,759	\$ 912,052	\$ 1,042,345
	\$ 139,414	\$ 278,827	\$ 418,241	\$ 487,948	\$ 557,655

Online additional personnel					
	Year 1	Year 2	Year 3	Year 4	Year 5
Professor of practice			132000	264000	264000
ERE			40920	81840	81840
Total Salary	0	0	132000	264000	264000
Total ERE	0	0	40920	81840	81840
Adjunct (2 courses)		16500	33000	33000	33000
ERE		5115	10230	10230	10230
Total Salary	0	16500	33000	33000	33000
Total ERE	0	5115	10230	10230	10230
Overall Online	0	16500	165000	297000	297000
Online ERE	0	5115	51150	92070	92070
Teaching Assistant		67550	144750	212300	221950
ERE		7498.05	16067.25	23565.3	24636.45
Tuition		41783	89535	131318	137287

Total Salary	50000	100000	100000	100000	100000
Total ERE	15500	31000	31000	31000	31000

Total	0	116831.05	250352.25	367183.3	383873.45
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Total Graders	1920	5760	7680	23040	21120 \$12/hr, 10 hr, 16 wks
Total ERE	42.24	126.72	168.96	506.88	464.64

Total Lab Assistants	7680	38400
Total ERE	168.96	844.8

Overall	192100	342660	306180	321540	319620
ERE	112586	205107	260104	288342	316200

Total	551447	1041288	1306566	1573685	1773073
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New Academic Program - Undergraduate Major
PEER COMPARISON

Select three peers (if possible/applicable) for completing the comparison chart from [ABOR-approved institutions](#), [AAU members](#), and/or other relevant institutions recognized in the field. The comparison programs are not required to have the same degree type and/or title as the proposed UA program. Information for the proposed UA program must be consistent throughout the proposal documents.

Program name, degree, and institution	Proposed UA Program	Arizona State University BS Software Engineering	Iowa State University BS Software Engineering	University of Arizona BS Computer Science
Current number of students enrolled		<ul style="list-style-type: none"> • 1322 (Total) • 563 (Full time) <i>(Source: ASEE 2019)</i>	<ul style="list-style-type: none"> • 416 (Total) • 393 (Full time) <i>(Source: ASEE 2019)</i>	<ul style="list-style-type: none"> • 1387 Total <i>(Source: UArizona 2019)</i>
Program Description	The Bachelor of Science in Software Engineering synergistically integrates proven engineering techniques and discipline with software development best practices that encompass all aspects of the software development lifecycle (SDLC). The curriculum includes core principles from systems engineering, electrical and computer engineering, and software engineering. The curriculum is based on a solid foundation of mathematics, including calculus, physics, and discrete math. The courses include topics related to software requirements analysis, design, code, integration, verification testing and software	<p>The BS program in Software Engineering blends engineering, computing, project leadership and software construction.</p> <p>Students learn how to make creative software solutions to today's problems. Software systems are complex, often including millions of lines of code. Graduates of the bachelor's degree program in Software Engineering possess the knowledge and skills of a defined engineering approach to complex systems analysis, planning, design, and construction.</p>	The Bachelor of Science degree in Software Engineering is jointly administered by the College of Engineering and the College of Liberal Arts and Sciences. The Software Engineering program provides undergraduate students with the opportunity to learn software engineering fundamentals, to study applications of state-of-the art software technologies and to prepare for the practice of software engineering. The student-faculty interaction necessary to realize this opportunity occurs within an environment motivated by the principle that excellence in undergraduate education is	Computer science emerges from the interaction of two powerful kinds of machines: computers and the human brain. Computer scientists are inventive, innovative, collaborative thinkers creating software solutions and synergies on the cutting edge of technology. The Information Age is here; computer scientists are shaping it. All undergraduate students begin the program as Pre-Computer Science. Students are admitted to the BA or BS in Computer Science program once pre-major courses are completed, and admission criteria are met.

	<p>project management. While there are some similarities between the Software Engineering degree program and UArizona's Computer Science degree program offered in the College of Science, there are also major differences. In Computer Science, students focus more on the programming fundamentals and theoretical applications of developing software. Software Engineering students, on the other hand, focus more on solving complex, multi-faceted/multi-disciplined engineering problems and product development.</p> <p>The Software Engineering curriculum is designed to prepare students to meet the ever-growing demands within the commercial, industrial, and federal government job sectors. Relevant software methodologies, such as Agile development, automated testing using continuous integration, and SW DevOps to increase the velocity of software application and service delivery, are also integral to the curriculum. Using these types of agile and adaptive approaches, students will be well suited for the many diverse opportunities in a</p>	<p>The program has a unique, project-driven curriculum, establishing a new model for software engineering education. The program is built around the concepts of engaged learning, discovery-based education and learn-by-doing. Students complete projects in every semester of the program to provide emphasis in communication, teamwork, critical thinking, and professionalism. Students have flexibility in designing their course of study; they select technical electives from a pool of courses in different software engineering application areas such as Web and Mobile applications, Embedded systems, and other interdisciplinary areas.</p>	<p>enhanced by an integrated commitment to successful, long-term research and outreach programs. The software engineering curriculum offers many elective choices in software engineering. Students may also take elective courses in computer engineering and computer science.</p>	
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	rapidly growing and ever evolving career in software engineering.			
Target Careers	<ul style="list-style-type: none"> • Software developer • Software Engineer for variety of application areas: <ul style="list-style-type: none"> ○ Web ○ Mobile ○ Embedded systems ○ Avionics ○ Robotics ○ Other software related fields • Software Quality Assurance • Software Leadership 	<ul style="list-style-type: none"> • Software developer • Software Engineer for variety of application areas: <ul style="list-style-type: none"> ○ Web ○ Mobile ○ Embedded systems ○ Avionics ○ Robotics ○ Other software related fields • Software Quality Assurance • Software Leadership 	<ul style="list-style-type: none"> • Software developer • Software Engineer for variety of application areas: <ul style="list-style-type: none"> ○ Web ○ Mobile ○ Embedded systems ○ Avionics ○ Robotics ○ Other software related fields • Software Quality Assurance • Software Leadership 	<ul style="list-style-type: none"> • Computer programmer • Software developer <ul style="list-style-type: none"> ○ Artificial Intelligence programmer ○ Machine Learning programmer • Database specialist • Mobile application developer • Web developer
Emphases? (Yes/No) List, if applicable	No	No	No	No
Minimum # of units required in the major	56 units in major + 12 units technical electives <i>(120 units for degree)</i>	56 units in major + 12 units technical electives <i>(120 units for degree)</i>	7 units basic Engineering + 46 units core major + 6 units technical electives <i>(125 units for degree)</i>	15 units Pre-Major + 21 units Major + 9 units technical electives <i>(120 units for degree)</i>
Level of Math required	Substantial Includes 23 total units of Calculus I & II, Discrete Math, Statistics and Physics (2 courses)	Substantial Includes 22 total units of Calculus I, II, III, Discrete Math, Linear Algebra, Statistics, Physics (1 course)	Substantial Includes 23 total units of Calculus I, II, Differential Equations, Statistics and Physics (1 course)	Significant Includes 12 units of Pre-Calculus, Calculus I, and Calculus II or Linear Algebra
Level of Second Language required	None	None	2 nd semester proficiency	2 nd semester proficiency
Pre-Major? (Yes/No) If yes, provide requirements.	Yes <ul style="list-style-type: none"> • Admitted as "Engineering - No Major Selected" • Completion of 12 or more UA credits of coursework within the Engineering curricula may that include: <ul style="list-style-type: none"> • MATH 125 – Calculus I 	No	No	Yes <ul style="list-style-type: none"> • CSC 110 - Intro to Computer Programming 1 • CSC 120 - Intro to Computer Programming 2 • CSC 210 - Software Development

	<ul style="list-style-type: none"> • MATH 129 – Calculus II • PHYS 141 – Introductory Mechanics • ENGL 102 – English Composition II • ENGR 102 – Intro to Engineering • ECE 175 – Programming I 			<ul style="list-style-type: none"> • CSC 245 - Intro to Discrete Structures
Special requirements to declare/gain admission to major? (i.e. pre-requisites, GPA, application, etc.)	<p>All students are enrolled as <i>Engineering, No Major Selected</i> until they have completed the following:</p> <ul style="list-style-type: none"> • Calculus I with a grade of C or better • 12 or more UA credits of coursework within the Engineering curriculum (shown above) • Admissions GPA of 2.0 or higher 	<ul style="list-style-type: none"> • Minimum 1210 SAT combined evidence-based reading and writing • Math score of a minimum 24 ACT combined score or 3.00 minimum ABOR GPA or class ranking in top 25% of high school class • Transfer students minimum transfer GPA of 2.75. 	In addition to the high school course requirements (4 years English, 3 years Math, 3 years Science, and 2 years Social Studies), students applying for admission to the College of Engineering must complete two years of a single world foreign language in high school, or two semesters of college in a single world language. Students applying for admission to the College of Liberal Arts and Sciences must complete a third year of social studies and two years of a single foreign language.	<ul style="list-style-type: none"> • Completion of the Pre-Major Courses (shown above) • GPA of 3.0 or higher in CSC 230, 210, and 245 • Cumulative GPA of 2.4 or higher • GPA of 2.0 or higher in all attempts at UA CSC courses • Complete at least 2 programming courses at UA
Internship, practicum, or applied/experiential requirements? If yes, describe.	<p>Yes</p> <ul style="list-style-type: none"> • Senior Interdisciplinary Capstone (ENGR 498A and ENGR 498B) 	<p>Yes</p> <ul style="list-style-type: none"> • Computing Capstone Project I and II (SER 401 and 402) 	<p>Yes</p> <ul style="list-style-type: none"> • Optional 1 semester Co-Op or 10-week Internship • Senior Design I and II (SE 491 and SE 492) 	<p>Optional</p> <p>Students may earn up to 6 units of internship credit.</p>

Additional questions:

1. *How does the proposed program align with peer programs? Briefly summarize the similarities between the proposed program and peers, which could include curriculum, overall themes, faculty expertise, intended audience, etc.*

The UA Software Engineering degree program is like all three of the peer programs that require and build strong foundational skills in Math and/or Physics as part of their curriculums. The Math courses are similar and deviate only after Calculus II. All programs also offer several introductory programming courses using a variety of computer programming languages. Additional programming skill development/experience is an integral part of the experiential course work and projects in other required courses. All programs offer Object-Oriented SW Analysis and Design, and a variety of technical electives to match student special interest areas. The 3 Software Engineering programs (UA, ASU, and Iowa State) all offer full-semester courses in software requirements analysis and test, software architecture and design, software security, computer organization, and some form of project and/or process management. Additionally, the software engineering degree programs also offer a 2-semester capstone course. Students in all the programs will be able to pursue software development careers in a variety of diverse and expansive applications areas including: Web-based development, mobile application development, embedded systems, robotics, machine learning, artificial intelligence, and other software-related fields.

For the three Software Engineering degree programs, the student learning outcomes (SLOs) comply with the seven ABET criteria for Engineering majors, and also comply with the following 2 additional ABET requirements specific to a Software Engineering degree program:

1. Curriculum

The curriculum must provide both breadth and depth across the range of engineering and computer science topics implied by the title and objectives of the program.

The curriculum must include computing fundamentals, software design and construction, requirements analysis, security, verification, and validation; software engineering processes and tools appropriate for the development of complex software systems; and discrete mathematics, probability, and statistics, with applications appropriate to software engineering.

2. Faculty

The program must demonstrate that faculty members teaching core software engineering topics have an understanding of professional practice in software engineering and maintain currency in their areas of professional or scholarly specialization.

2. *How does the proposed program stand out or differ from peer programs? Briefly summarize the differences between the proposed program and peers, which could include curriculum, overall themes, faculty expertise, intended audience, etc.*

While there are many similarities in the Software Engineering degree programs at UArizona, ASU and Iowa State, there are also key differences that are very attractive to prospective UArizona students. First and foremost, because the proposed degree program at UA is offered out of the College of Engineering, one of its major strengths is the multi-disciplinary influences provided by the Systems and Industrial Engineering, and Electrical and Computer Engineering Departments. The elective options available to students are very diverse and can include courses that give students a broad-based experience in not only software engineering, but also Electrical Engineering and/or Systems Engineering specialties. The intersections of the ECE, SE, and the SW Engr degree programs, foster the ability to tackle interdisciplinary engineering problems to meet the evolving technological changes and requirements to meet society's needs. This manifests itself in software engineering students being an integral part of the highly successful Interdisciplinary Capstone course (ENGR 498A/B) where students work on multi-disciplined teams to develop products for a diverse set of industry and/or academia sponsors.

The new UArizona Software Engineering courses will be developed using relevant and industry-focused technology solutions, tools, languages, and methodologies in a diverse portfolio of applications. Wherever possible, the software development tools and platforms used in the coursework will consist of widely available open-source integrated development environments (IDEs), operating systems (OS), and cloud-based infrastructures. The Software Assurance and Security course will follow best practice secure coding standards/methodologies and use commercially available static code analyzers widely used in the industry to ensure compliance to secure coding practices. The Software DevOps course uses a state-of-the-art software DevOps workflow approach with common tools used in the industry. Software DevOps enables students to develop, test, and deliver software products faster and more efficiently, while at the same time providing a development pipeline of new capabilities and features to consumers. Using DevOps workflows and continuous integration / continuous delivery (CI/CD) approaches, students will be able to plan, develop, and deliver software features to meet customer's ever-evolving needs. Students will also learn to track and evaluate how the software's quality and reliability is increased using the SW DevOps approaches.

While all three Software Engineering programs have some form of Software Project Management course, the UArizona course will also cover different common SW development methodologies. These methodologies include the traditional waterfall development approach, as well multiple Agile methodologies (Scrum, Peer Programming, KanBan, etc). Further, students will learn how to use different measures and metrics to track and predict progress in meeting delivery milestones. UA's Software

Project Management course will also cover software configuration control (SWCM), how to make use software reliability predictive measures, and software quality assurance (SWQA). The Cost Estimation course in the UA program provides students with exposure to different methodologies and tools used to estimate software development costs for different types of products.

As is often asked, what are the differences between the UArizona BS Software Engineering degree and the UArizona Computer Science degree? To begin with, the ABET criteria for the two degrees are different. The Software Engineering degree complies with the ABET criteria for Engineering degrees and the two additional software engineering specific criteria discussed above (Curriculum and Faculty). The Computer Science degree is compliant with the ABET criteria for Computer Science and Computing. The SW Engineering degree is comprised of more than 25% of courses in math, basic science, and physics, while the Computer Science has only 12 units of math. Physics courses are not required in the Computer Science program. The Venn diagram shown in Figure 1 below highlights some of the other major differences between the programs. While there are some intersections in both programs between the topics and types of classes in each respective degree programs, the focus of each program is very different. In Computer Science, students focus more on the programming fundamentals and theoretical applications of developing software. Software Engineering students, on the other hand, focus more on solving complex, multi-faceted/multi-disciplined engineering problems and product development.

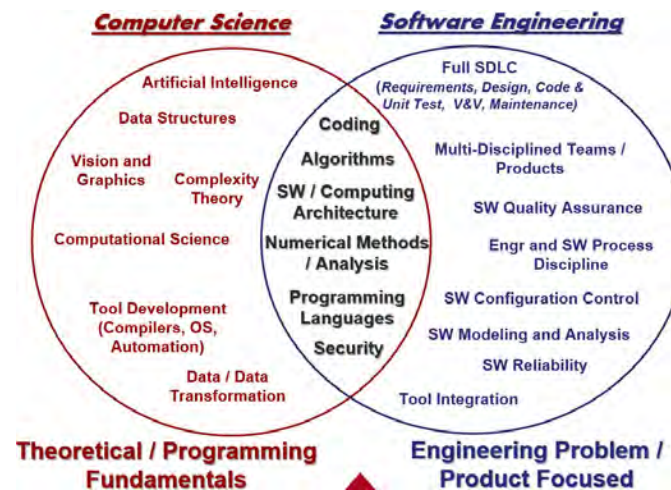


Figure 1. Comparison of Computer Science and Software Engineering Programs

3. *How do these differences make this program more applicable to the target student population and/or a better fit for the University of Arizona?*

The University of Arizona College of Engineering currently does not offer an engineering degree related explicitly to Software Engineering. UA engineering students that have historically leaned more toward software engineering careers have typically obtained Electrical and Computer Engineering degrees, with an emphasis towards Computer Engineering, and take various computer programming courses as electives. Alternatively, these students obtain a Computer Science degree that lead to future software career opportunities but lack the specific engineering discipline and emphasis offered with the Software Engineering degree curriculum. Since Software Engineering is growing as a *'in high-demand'* engineering degree (as shown by the Burning Glass analysis), it is likely that students are selecting other universities since UArizona does not offer Software Engineering. It is believed that offering an innovative Software Engineering degree will attract new students. As we have seen over the past decade, software has become an integral element/component within the systems, products, and technologies that are part of the 4th industrial revolution.

Given the ever-increasing demand in the industry for software engineers, there is an equally increasing opportunity for the CoE to diversify their degree offerings by offering this new degree. This will attract more students to the University of Arizona.

Additionally, two of the colleges' strategic pillars are:

- 1) Driving student success for a rapidly changing world, and
- 2) Tackling critical problems at the edges of human endeavor.

The new Software Engineering degree plays a critical role in both pillars. The students graduating with the degree in Software Engineering will be better positioned to develop the skills and mindsets to be leaders in the areas of space, natural and built environments, ever-increasing automation and connectivity, human and intelligent systems, data, computing, and network sciences.

By offering a competitive, relevant, and experiential-based learning Software Engineering program to prospective students, it increases not only the net enrollment in the college, but also the ability to grow research programs that are attractive to

forthcoming undergraduate and graduate students. All of which contribute to higher recruitment numbers and bringing additional revenue to the College and University. Hence, we can recruit the faculty that can significantly impact their areas of research and education. These faculty will pursue research grants to advance the state-of-the-art in software engineering and integrate their research into the curriculum. The broader impact of these faculty will ultimately drive the program's national ranking higher.

While less obvious, another goal for the program is to increase the number of female and other underrepresented students in the College of Engineering by offering the Software Engineering degree. Additional features and programs that contribute to enhancing student success and increasing diversity and inclusion will also be included in the support infrastructure for the degree.

New Academic Program Request

University of Arizona

Name of Proposed Academic Program: BS in Medicine								
Academic Department: College of Medicine - Departments of Pharmacology, Cellular and Molecular Medicine, Physiology, Family Community Medicine, Immunobiology, Pathology, Biochemistry, Medicine, College of Engineering - Biomedical Engineering								
Geographic Site: UA Main, Tucson, AZ								
Instructional Modality: Online and in person								
Total Credit Hours: 120								
Proposed Inception Term: Fall 2021								
<p>Brief Program Description: The Bachelor of Science in Medicine is a four-year degree program designed and delivered as a collaboration between clinicians, basic scientists, and humanists, with focus on clinical reasoning and case-based learning. The Program juxtaposes applied topics such as what it is to be a health care provider, clinical case analysis, medical ethics, professionalism, health care delivery to improve quality care, and hands-on experience through simulation, with topics in the human medical sciences, including advanced anatomical, biochemical, neurological, and physiological science, pathology of disease, mechanisms of treatment, and integrative therapies.</p>								
<p>Learning Outcomes and Assessment Plan: <i>At the successful completion of this major, students will be able to</i></p> <ol style="list-style-type: none"> 1. Demonstrate in-depth knowledge of the structure and function of the human body in health and disease including use of appropriate medical terminology, and apply this knowledge to evaluation of disease therapies 2. Demonstrate knowledge of the scope of medical device technology as well as the complex datasets generated and their application to the practice of precision medicine. 3. Describe social determinants of health including racial/ethnic disparities, and apply scientific evidence, best practices, and professional judgment to proposing strategies to mitigate negative impacts of social factors on health outcomes. 4. Demonstrate understanding of professional and ethical responsibility in independent and/or multidisciplinary team settings. 5. Demonstrate skills needed to engage in life-long learning, including the ability to find and critically evaluate relevant information, and apply it to solving clinical problems. <p>Methods of Assessment Embedded exam questions, Exit survey Pre-post assessment of health disparities Pre-post assessment of medical ethics and professionalism Grading rubric for clinical case interpretation</p>								
<p>Projected Enrollment for the First Three Years:</p> <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="padding: 5px;">Year 1</th> <th style="padding: 5px;">Year 2</th> <th style="padding: 5px;">Year 3</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">250</td> <td style="padding: 5px;">500</td> <td style="padding: 5px;">1000</td> </tr> </tbody> </table>			Year 1	Year 2	Year 3	250	500	1000
Year 1	Year 2	Year 3						
250	500	1000						

<p>Evidence used to determine projected enrollment: These numbers were derived based on the assumption that the trend in graduates will trail behind the estimated enrollment due to attrition and time to complete the requirements, which is expected to be 2-3 years.</p>	
<p>Evidence of Market Demand: Healthcare consumes nearly one-fifth of the US economy with projections of job growth at >30% for the next 10 to 20 years. A powerful signal of rising demand for healthcare services and healthcare workers is how much money is projected to be spent on healthcare in the future. More than doubling from 2010 to 2026, when it reaches beyond \$5.7 trillion, expenditures include payments for all healthcare costs, including pharmaceuticals, equipment, and technology. Expenditures will rise for many reasons, but growing demand for the services of healthcare workers is a very significant reason. Healthcare employment growth has been thriving since the end of the recession. The US Bureau of Labor Statistics Current Employment Statistics has shown month after month growth in healthcare employment since 2013, when there were only small declines in three separate months, with the rest of the year showing monthly increases. After that year, healthcare job growth has been robust, reaching a single-month growth record of more than 45,000 new jobs filled.</p>	
<p>Similar Programs Offered at Arizona Public Universities: ASU - Medical Studies (BS)</p>	
<p>New Resources Required? (i.e. faculty and administrative positions; infrastructure, etc.): 2 Academic Advisors (1.0 FTE ea) as well as an approved plan to increase 1 academic advisor per every additional 200-300 students enrolled. This plan will allow for rapid escalation of student advisors based on the number of students enrolled. 1 Director (1.0 FTE) and 1 Co-Director (0.5 FTE), upon escalation the co-Director will be approved at a (1.0 FTE) 1 Educational/Technology Specialists (1.0 FTE) with a plan of one additional educational/Technology Specialist for every 500 additional students enrolled. 1 Staff (1.0 FTE) with a plan of one additional Staff hire for every 500 additional students enrolled. These positions are approved by leadership (see letters of support from Drs. Dake and Abecassis).</p>	
<p>Program Fee/Differentiated Tuition Required? Estimated Amount: NA</p>	<p>YES <input type="checkbox"/> NO <input checked="" type="checkbox"/></p>
<p>Program Fee Justification: NA</p>	
<p>Specialized Accreditation?</p>	<p>YES <input type="checkbox"/> NO <input checked="" type="checkbox"/></p>
<p>Accreditor: NA</p>	

University of Arizona AMS » College of Medicine – Tucson
BS Medicine

BS Medicine Curriculum Map

Courses and Activities Mapped to BS Medicine Outcome Set

	Outcome				
	Outcome 1: Structure & Function Demonstrate in-depth knowledge of the structure and function of the human body in health and disease, including use of appropriate medical terminology, and apply this knowledge to evaluation of disease therapies.	Outcome 2: Medical Device Technology Demonstrate knowledge of the scope of medical device technology, as well as the complex datasets generated and their application to the practice of precision medicine.	Outcome 3: Social Determinants Describe social determinants of health, including racial/ethnic disparities, and apply scientific evidence, best practices, and professional judgment to proposing strategies to mitigate negative impacts of social factors on health outcomes.	Outcome 4: Professional & Ethical Responsibility Demonstrate understanding of professional and ethical responsibility in independent and/or multidisciplinary team settings.	Outcome 5: Life-Long Learning Demonstrate skills needed to engage in life-long learning, including the ability to find and critically evaluate relevant information, and apply it to solving clinical problems.
Courses and Learning Activities					
PHCL 412 Intro to Pharmacology	A				
PATH 415 Mechanisms of Human Diseases	A				
PSIO 467 Endocrine Physiology	A				
BME 4** Introduction to Medical Devices and Their Utilization		A			
FCM 496D Disability Perspectives in Research, Policy, and Practice			A		
MED 4** Medical Ethics and Professionalism				A	
CMM 459 Clinical Reasoning					A
CMM 461 Medical Case Based Learning					A
Legend : I Introduced P Practiced A Assessed					

Proposal Title: Development of a Bachelor of Science in Medicine
Department: Pharmacology

Personnel Salaries (includes salary and ERE)	FY2021	FY2022	FY2023
Staff	\$ 102,180	\$ 128,380	\$ 222,700
Faculty	\$ 65,500	\$ 163,750	\$ 245,625
Students	\$ -	\$ -	\$ -
Graduate	\$ -	\$ -	\$ -
Undergraduate	\$ -	\$ -	\$ -
Post-docs	\$ -	\$ -	\$ -
Other Professionals (list)	\$ -	\$ -	\$ -
Advertising/Outreach and Ops	\$ 10,000	\$ 15,000	\$ 20,000
Total Operating Expenses	\$ 177,680	\$ 307,130	\$ 488,325
Revenue			
Program Revenue*	\$ -	\$ 190,991	\$ 441,587
PIF	\$ 100,000	\$ 100,000	\$ -
Additional funds committed by Department, College, or Other Unit	\$ (77,680)	\$ (16,139)	\$ (46,738)

Personnel Assumptions:

	FTE			Salary
Staff				
Academic Advisor	1.00	1.00	1.50	\$52,000
Administrative Support		0.50	1.00	\$40,000
Educational/Technology Specialist	0.50	0.50	1.00	\$52,000
Faculty	0.20	0.50	0.75	\$250,000

***Program Revenue**

RCM Revenue	Y1	Y2	Y3	Y4	Y5	Enrollment	Tax	1,313	
Projected Enrollment (incremental)	100	150	150	150	200		Net	0.3329	437.10
Projected Student Credit Hours	500	1,500	2,659	4,119	4,904				875.90
Undergraduate Enrollment	0	87,590	131,385	131,385	131,385		SCH	310.00	
Student Credit Hours	0	103,401	310,202	549,832	851,891		Tax	0.3329	103.20
	0	190,991	441,587	681,218	983,276				206.80

Example 4-year program for B.Sc. Human Medical Sciences		
Fall 1	CHEM 151—General Chemistry I and LAB	4
	ENGL 101—Writing/Composition I	3
	Tier 1 Gen Ed	3
	MCB 181 R/L—Biological Sciences I and LAB	4
	Fall yr1 Credit Hours:	14
Spring 1	CHEM 152—General Chemistry II and LAB	4
	ENG 102—Writing/Composition II	3
	MATH 125—Calculus I or MATH 263—Intro Biostatistics	3
	Tier 1 Gen Ed	6
	Spring yr1 Credit Hours:	16
Fall 2	CHEM 241A/243A—Organic Chemistry I and Lab	4
	PSIO 201 – Human Anatomy & Physiology I	4
	Tier 1 Gen Ed	3
	Language I	4
	Fall yr2 Credit Hours:	15
Spring 2	PSIO 201— Human Anatomy and Physiology II	4
	PHYS 102—Physics I and LAB	4
	MCB 182 R/L—Biological Sciences I and LAB	4
	Language II	4
	Spring yr2 Credit Hours:	16
Fall 3	BIOC 384 — Foundations in Biochemistry	3
	MIC 205A/B—General Microbiology and LAB	4
	PHCL 412—Intro to Pharmacology	3
	Tier 2 Gen Ed	6
	Fall yr3 Credit Hours:	16
Spring 3	CMM 410 – Histology and Intro to Pathology	3
	BIOC 385— Metabolic Biochemistry	3
	PSIO 303B— Integrative Cellular Physiology	3
	MIC 419—Immunology	3
	Spring 3 Credit Hours:	15
Fall 4	*PCOL 410—Pharmacogenomics and Precision Medicine	3
	*PHCL 452—Advanced Pharmacotherapeutics	3
	PATH 415—Mechanisms of Human Disease	3
	LAW 452—Health Law	3
	*IMB 401 - Medical Microbiology and Immunology	3
	Fall yr4 Credit Hours:	15
Spring 4	*PHCL 400—Intro to Human Neuro-anatomy, -physiology, -pathology and -pharmacology	3
	*FCM 401 Being a Health Care Professional	3
	ECOL 320— Genetics	3
	PSIO 305 - Integrative Physiology Systems, or PSIO 431 - Physiology of the Immune System	3
	Tier 2 Gen Ed	3
	Spring yr4 Credit Hours:	15

Yr1 SCH 0
Y2 SCH 8
Y3 SCH 9
Y3 SCH 15

Note:
1st Yr will take one course - 2 units per provost requirement

31
0.258064516 -0.241935484

250 185.483871

31
0.290322581 -0.709677419

400 283.8709677

30

0.5

550 275

From: [Vanderah, Todd W - \(vanderah\)](#)
To: [Gomez, Rebecca L - \(rgomez\)](#)
Subject: Detailed Budget
Date: Friday, December 4, 2020 2:11:55 PM

Hi Rebecca,

To prevent this from delaying things:

Academic Advisor (1.0FTE) Salary (\$120,00 - \$150,000 + ERE)

1 Co- Advisor (0.5 FTE) Salary (\$120,000 - 130,000 + ERE)

Initial 2 Academic Advisors (1.0 FTE ea) Salary for Experienced (\$75,000-\$95,000 + ERE) and Salary for Mid-level (\$55,000-\$65,000)

as well as an approved plan to increase 1 academic advisor per every additional 200-300 students enrolled. This plan will allow for rapid escalation of student advisors based on the number of students enrolled.

1 Educational/Technology Specialists (1.0 FTE) Salary (\$65,000-\$95,000 + ERE)

with a plan of one additional Educational/Technology Specialist for every 500 additional students enrolled.

1 Staff (1.0 FTE) Salary (\$50,000 - \$60,000 + ERE) with a plan of one additional Staff hire for every 500 additional students enrolled.

These positions are approved by leadership (see letters of support from Drs. Dake and Abecassis).

Todd W. Vanderah
Professor and Head
Department of Pharmacology
Co-Director of the MD/PhD Program
Director of the Comprehensive Pain and Addiction Center
University of Arizona, COM

Undergraduate Major Peer Comparison Chart - select two peers for completing the comparison chart from (in order of priority) [ABOR-approved institutions](#), [AAU members](#), and/or other relevant institutions recognized in the field. The comparison chart will be used to identify typically required coursework, themes, and experiences for majors within the discipline. The comparison programs are not required to have the same degree type and/or major name as the proposed UA program. Information for the proposed UA program must be consistent throughout the proposal documents.

Program name, emphasis (sub-plan) name (if applicable), degree, and institution	Proposed UA Program: BS Medicine	Peer 1: BS Medical Studies, Arizona State University	Peer 2: BS Health Sciences- Allied Health, Northern Arizona University
Current # of enrolled students		Information regarding program enrollment not provided	33
Major Description. Includes the purpose, nature, and highlights of the curriculum, faculty expertise, emphases (sub-plans; if any), etc.	The Bachelor of Science in Medicine is a four-year degree program designed and delivered as a collaboration between clinicians, basic scientists and humanists, with focus on clinical reasoning and case-based learning. The Program juxtaposes applied topics such as what it is to be a health care provider, clinical case analysis, medical ethics, professionalism, health care delivery to improve quality care, and hands-on experience through simulation, with topics in the human medical sciences, including advanced anatomical, biochemical, neurological, and physiological science, pathology of disease, mechanisms of treatment, and integrative therapies.	The medical studies BS program provides students with the opportunity to meet the prerequisites for a variety of health professions programs (medicine MD/DO programs, dentistry, physician assistant, pharmacy, occupational therapy, optometry and others) and prepares the student for required postgraduate entrance exams, including the revised MCAT. Students can customize the medical studies degree to meet the prerequisites of the health professions programs for which they intend to apply. Students have the opportunity to learn directly from health care providers who are currently practicing in the field, and they can select clinically related internships or electives during their junior year. This degree program integrates communication, ethics, critical thinking, teamwork and leadership, all of which are essential competencies for members of today's health care teams. https://chs.asu.edu/programs/medical-studies	The online B.S. Health Sciences Allied Health program provides an innovative "3+1" curriculum that prepares students to advance their careers in health-related fields. These programs are specifically designed for students who have completed their associate's degree in an allied health discipline from a regionally accredited program and who have successfully obtained the related professional license. Our programs provide students with foundational knowledge of health promotion, disease promotion concepts, and understanding of the interconnectedness of personal, family, organizational, community, and societal health. Our students will use this knowledge to work collaboratively to provide comprehensive patient-centered care. While completing this degree, students will expand their critical thinking, problem solving, and decision making skills and enhance their ability to communicate effectively with others in order to provide excellent care for their patients. We specialize in preparing students in enhancing

			<p>their careers with an understanding of the importance of leadership and inter-professional teamwork among health professionals, as well as skills to sustain personal health and well-being. https://nau.edu/health-sciences/allied-health-online/</p>
<p>Target careers</p>	<p>Healthcare Providers at nursing homes (33% projected growth by 2026), Home Health Aides (70% projected growth by 2026); Personal Care Aides (32% projected growth by 2026); Physical Therapist Aides (32% projected growth by 2026); Occupational Therapy Assistants (22% projected growth by 2026); Phlebotomists (20% projected growth by 2026); Health Administration-Health Care Management; Health Information Technologist; Medical Technologist; <u>A BS in Medicine along with advanced certification and/or a Master's degree will allow students to enter the following careers:</u> Physician Assistants (40% projected growth by 2026); Nurse Practitioners (RN) (41% projected growth by 2026); Licensed Practical and Vocational Nurses (LPN & LVN) (37% projected growth by 2026); Physical Therapist Assistants (30% projected growth by 2026); Medical Assistant (28% projected growth by 2026); Operations Research Analysts (25% projected growth by 2026); Health Specialties Teachers–</p>	<p>Positions could include:</p> <ul style="list-style-type: none"> • community health worker • project coordinator • research assistant • sales or marketing representative (e.g., medical device or pharmaceutical industry) <p>Students are well-prepared to pursue postgraduate health degrees, resulting in a career as a:</p> <ul style="list-style-type: none"> • chiropractor • dentist • naturopathic physician • optometrist • pharmacist • physician • physician assistant • podiatrist • public health professional 	<p>Diagnostic Medical Imaging and Therapy Medical Assisting Public Health Allied Health Physical Therapy Respiratory Care Surgical Technology Paramedic Care Fitness Wellness Nutritional and Food Physical Education</p>

	<p>Postsecondary (22% projected growth by 2026); Occupational Therapists (25% projected growth by 2026); Perfusionist and Echo Technician; Radiation Therapist/Technologist; Radiologic and MRI Technologists; Medical Device Technologist; Pharmacy Technician Certificate; Surgical Technologists; Massage Therapists; Medical Records and Health Information Technicians; Dental Assistant; Nuclear Medicine Technologist; Dental Hygienists; Diagnostics Medical Sonographers and Cardiovascular Technologists and Technicians; Medical and Clinical Laboratory Technologists and Technicians; Nurse Anesthetists, Nurse Midwife, Nurse Practitioners Speech Therapy Respiratory Therapy Emergency Medical Training Paramedics <u>A BS in Medicine along with advanced doctoral degree and licensure will allow students to enter into careers such as:</u> Physical Therapists (DPT); Medical Physician (MD or DO), Professor (PhD), Pharmacists (PharmD), Dentist (DDS), Podiatrist (DPM), Optometrist (OD), Nurse Practitioners (DNP)</p>		
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Total units required to complete the degree	120	120	120
Upper-division units required to complete the degree	42 Minimum	45 Minimum	30 Minimum
Foundation courses			
Second language		None	
Math	Moderate Math Strand 3 Units	Minimum 3 units (Pre-Calculus)	Minimum 3 (Quantitative Reasoning)
Pre-major? (Yes/No). If yes, provide requirements. Provide email(s)/letter(s) of support from home department head(s) for courses not owned by your department.	No	No	Yes- To be admitted to this program, you must: <ul style="list-style-type: none"> • have or be currently pursuing an Allied Health Associate's degree through a regionally-accredited college • secure state certification or licensure upon completion of your Associate's degree • have a cumulative GPA of 2.5 or higher
List any special requirements to declare or gain admission to this major (completion of specific coursework, minimum GPA, interview, application, etc.)	None	Major GPA: 2.00 minimum Cumulative GPA: 2.00 minimum	A cumulative grade point average of at least 2.0 on all work attempted at Northern Arizona University
Major requirements			
Minimum # of units required in the major (units counting towards major units and major GPA)	52	60	30
Minimum # of upper-division units required in the major (upper division units)	47	45	30

counting towards major GPA)			
Minimum # of residency units to be completed in the major	18	30	18
Required supporting coursework (courses that do not count towards major units and major GPA, but are required for the major). Courses listed must include prefix, number, units, and title. Include any limits/restrictions needed (house number limit, etc.). Provide email(s)/letter(s) of support from home department head(s) for courses not owned by your department.	<p><u>Statistics Requirement (3 units)</u> Choose one: MATH 163 Basic Statistics (3 units) MATH 263 Introduction to Statistics and Biostatistics (3 units) SBS 200 Introduction to Statistics for the Social Sciences (4 units) BME 376: Biomedical Statistics (3 units) AREC 239 Introduction to Statistics and Data Analysis (4 units)</p> <p><u>General Sciences: (30 units)</u> CHEM 141 and 143/145 or CHEM 151 or General Chemistry I (4 units); CHEM 142 and 144/146 or CHEM 152 or General Chemistry II (4 units); PHYS 102/198 or PHYS 141/142 Physics I and Lab (4 units); CHEM 241A and 243A Organic Chemistry I and Lab (4 units); BIOC 384 Foundations in Biochem OR BIOC 385 Metabolic Biochemistry (3 units); MCB 181R Introduction to Biology (3 units) PSIO 201 Human Anatomy and Physiology I and Lab (4 units); PSIO 202 Human Anatomy and Physiology II and Lab (4 units);</p>	None	Students can transfer up to 90 credits into the major
Major requirements. List all major	<p><u>Major Core: (33 units)</u> New MED 1** Introduction to Medical Health Care I (2 units)</p>	<p>3.0 GPA required</p> <p>Occupational Therapy Professional</p>	<p>Take the following 30 units with a Grade of "C" or better in each course:</p> <ul style="list-style-type: none"> • HS 300, HS 320, FW 321, HS

<p>requirements including core and electives. If applicable, list the emphasis requirements for each proposed emphasis. Courses listed count towards major units and major GPA. Courses listed must include prefix, number, units, and title. Mark new coursework (New). Include any limits/restrictions needed (house number limit, etc.). Provide email(s)/letter(s) of support from home department head(s) for courses not owned by your department.</p>	<p>FCM 201 Being a Healthcare Professional (3 units)</p> <p>New MED 2** Seminar-Careers in Medical-Health Sciences (2 unit)</p> <p>CMM 459 & 461 Clinical Reasoning and Medical Case Based Learning (2 units)</p> <p>CMM 410 Human Histology: An Intro to Pathology (3 units) OR equivalent Histology, CMM 437, and 438 and 439 (1 unit each)</p> <p>PSIO 467 Endocrine Physiology (3 units)</p> <p>IMB 401 Medical Microbiology & Immunology (4 units) OR PSIO 431 Physiology of the Immune System (3 units)</p> <p>New BME 4** Introduction to Medical Devices and Their Utilization (3 units)</p> <p>New MED 4** Medical Ethics and Professionalism OR PSIO 411 Scientific Methods and Professional Ethics OR PHIL 321 Medical Ethics (3 units)</p> <p>PHCL 412 Intro to Pharmacology (3 units) OR PCOL 406 Comprehensive Human Pharmacology (5 units)</p> <p>PATH 415 Mechanisms of Human Diseases (3 units)</p> <p>FCM 496D Disability Perspectives in Research, Policy, and Practice (3 units)</p> <p><u>Major Elective Areas: (19 units)</u></p> <p>Theme 1- Medical Technology;</p> <p>BME 477 Introduction to Bioinformatics (instructor consent required) (3 units)</p> <p>BME 486 Biomaterial-Tissue Interactions</p> <p>New 3** Medical Tech Transfer</p> <p>CSC 250 Essential Computing for the Sciences</p>	<p>Track</p> <p>CHS 260: Health Professions Terminology</p> <p>PSY 341: Developmental Psychology (SB)</p> <p>PSY 366: Abnormal Psychology (SB)</p> <p>SOC 400: Perspectives on Aging (SB) or SOC 410: Race, Medicine, and the Body (L) or SOC 418: Aging and the Life Course (SB & H) or SOC 424: Women and Health (SB) or SOC 426: Social Inequality (SB) or SOC 427: Sociology of Health and Illness (SB)</p> <p>Optometry Professional Track</p> <p>MAT 251: Calculus for Life Sciences (MA)</p> <p>MIC 205: Microbiology (SG) AND MIC 206: Microbiology Laboratory (SG)</p> <p>PHY 111: General Physics (SQ) AND PHY 113: General Physics Laboratory (SQ)</p> <p>PHY 112: General Physics (SQ) AND PHY 114: General Physics Laboratory (SQ)</p> <p>Pharmacy Professional Track</p> <p>COM 225: Public Speaking (L)</p> <p>MAT 251: Calculus for Life Sciences (MA)</p> <p>MIC 205: Microbiology (SG) AND MIC 206: Microbiology Laboratory (SG)</p> <p>PHY 111: General Physics (SQ) AND PHY 113: General Physics Laboratory (SQ)</p> <p>Medicine (MD/DO) Professional Track</p> <p>BIO 340: General Genetics</p> <p>MIC 205: Microbiology (SG) AND MIC 206: Microbiology Laboratory (SG)</p> <p>PHY 111: General Physics (SQ) AND PHY 113: General Physics Laboratory (SQ)</p> <p>PHY 112: General Physics (SQ) AND PHY 114: General Physics Laboratory (SQ)</p> <p>Dentistry Professional Track</p> <p>PHY 111: General Physics (SQ) AND PHY 113: General Physics Laboratory (SQ)</p>	<p>404, HS 410 (15 units)</p> <ul style="list-style-type: none"> HS 390W which meets the junior-level writing requirement (3 units) HS 460C which meets the senior capstone requirement (3 units) Any other Health Sciences (HS) or Fitness Wellness (FW) courses at the 300-level or higher (9 units) <p>HS 200 is a requisite for other courses that are required for this degree. You may transfer in an equivalent or be able to count it toward your general elective credit if taken at Northern Arizona University.</p>
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	<p>CMM 441: Brightfield Microscopy (1 unit) CMM 446: Fluorescence Microscopy (1 unit) CMM 442: Fundamentals of Digital Imaging (1 unit) LAW 476A – Dru (3 units)g Discovery, Development, and Innovation to Reach the Marketplace New: Technology and Big Data in Individualized Care New SURG 4** Virtual Medical Care Training & Education in the Digital Age</p> <p><u>Theme 2- Basic Medical Sciences;</u> BIOC 466 Biochemistry of Nucleic Acids CMM 401 Gross Anatomy (Summer course only) (4 units) CMM 437 Immunology Basics (1 unit) IMB 467 Cancer Immunology and Immunotherapy (3 units) IMB 465 Principles and Molecular Mechanisms of Microbe-Host Interactions (3 units) CMM 427 Pathophysiology Basics (1 unit) CMM 428 Pathophysiology of Integumentary, Respiratory & Digestive Systems (1 unit) CMM 429 Pathophysiology of Urogenital and Endocrine Systems (1 unit) CMM 404 Cell Biology of Disease (3 units) PHCL 445 Drugs of Abuse (3 units) PHCL 430 Pain (2 units) PHCL 444 Human Neurobiology Basics (1 unit) PHCL 331 Controversies in Pharmacology (3 units) PSIO 427 Metabolism and Disease (3 units) PSIO 450 Respiratory</p>	<p>PHY 112: General Physics (SQ) AND PHY 114: General Physics Laboratory (SQ) MIC 205: Microbiology (SG)</p> <hr/> <p>Physician Assistant (PA) Professional Track</p> <p>CHS 260: Health Professions Terminology BIO 340: General Genetics MIC 205: Microbiology (SG) MIC 206: Microbiology Laboratory.(SG)</p>	
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	<p>Physiology (3 units) PSIO 452 Digestive Physiology (3 units) PSIO 465 Systems Neurophysiology (3 units) PSIO 469 Human Reproductive Physiology (3 units) PSIO 485 Cardiovascular Physiology (3 units) PSIO 487 Physiology of Aging (3 units) PHCL 442 Human Performance Pharmacology (3 units) PCOL 410 Pharmacogenomics and Precision Medicine (3 units) PCOL 305 Drug Approval: The 3 Billion Dollar Bet (2 units) PCOL 355 Drug Delivery Systems (3 units) PCOL 350 ADME: How the Body Changes Drugs (3 units) CMM 444-6: Medical Embryology (1-3 units) New IMB 4** Medical Microbiology Basics (1 unit) New IMB 4** Medical Virology Basics (1 unit) MCB 301 Molecular Basis of Life (4 units) MCB 304 Molecular Genetics (4 units)</p> <p><u>Theme 3-Medicine and Society;</u> PHPM 310 Health Care in the U.S. (3 units) LAW 452 Health Law (3 units) LAW 478A - Legal and Regulatory Aspects of Healthcare Delivery (3 units) LAW 480A - Liability and Regulation of Healthcare Professionals (3 units) New CMM 3** Health, Medical Care and Climate Change (3 units) New FCM 4** Introduction</p>		
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	<p>to Population Health Management (3 units) New FCM 4** Introduction to the Organization & Delivery of Health Services in the US (3 units) FCM 302 Clinical Health Disparities in Sexual and Gender Minority (SGM) Populations (2 units) New FCM 4** Addressing Health Disparities through Interprofessional Clinical-Community Collaboration “In the Field Course” (1-3 unit) New MED 2** The History of Medicine (3 units) New MED 3** The History of Medical Technology (2 units) CMM 479 Art of Scientific Discovery (1 unit) HPS 433 Global Health (3 units) EHS 439A Outbreaks and Environmental Microbiology: Then to Now (3 units) EHS 420 Environmentally Acquired Illnesses (3 units)</p> <p><u>Theme 4- Integrative and Practice-Focused Medicine</u> FCM 301 Substance Misuse in Maternal and Child Health Populations (3 units) FCM 496A Advancements in Substance Misuse Research and Clinical Care Seminar (2 units) PSIO 497A Physiology of Mind-Body Interactions (3 units) IHM 401/501 Integrated Health & Medicine Foundation: Mind-Body-Spirit: Addressing Stress & Mental Health (1 unit) New FCM 4** Creative Arts in Health, Healing & Wellness (3 units) New MED 4** Difficult Conversations in Patient</p>		
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	<p>Care: The Art of Empathy (1 unit) EMD 197 – Emergency Medical Technician (4 units) EMD 350 – Advanced Emergency Medical Services Systems (3 units) New NSC 2** Fundamentals of Precision Nutrition and Wellness (3 units) NSC 310 Principles of Human Nutrition in Health and Disease (3 units)</p>		
<p>Internship, practicum, applied course requirements (Yes/No). If yes, provide description.</p>	<p>Internship recommended</p>	<p>Internship recommended</p>	<p>No</p>
<p>Senior thesis or senior project required (Yes/No). If yes, provide description.</p>	<p>No</p>	<p>No</p>	<p>Yes- Capstone HS460C- This capstone course will focus on conceptual understanding of leadership and interprofessional teamwork and the analysis and synthesis of these concepts as observed in practice settings. While students will still engage in targeted observation in various practice settings (minimum of 24 clock hours required). Arrangements for observation experiences will NOT occur prior to the beginning of the course, as the requirements for these experiences will be introduced within the course. In addition to other course requirements such as quizzes and reflective discussions on selected course topics, students will produce a summative portfolio of important concepts and skills acquired throughout the degree program. HS 460C will requires a Certificate of Eligibility from an advisor who will make sure you have met the requirements and will enroll you in the course. Degree progression plans should ensure that students</p>

			leave general electives as the preferred courses to be taken with HS 460C. If necessary, 400-level courses may be taken concurrently with the capstone. ALL other HS courses must be completed prior to the semester of the capstone.
Additional requirements (provide description)	None	None	None
Minor (specify if optional or required)	Optional	Optional	Required

*Note: comparison of additional relevant programs may be requested.

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EXECUTIVE SUMMARY

Item Name: Proposed Revision to ABOR Policy 2-325 “Arizona Teacher’s Academy” (First Reading and Immediate Implementation)

Action Item

Requested Action: The board office asks the board to review on first reading and adopt for immediate implementation the proposed revisions to ABOR Policy 2-325 “Arizona Teachers Academy”.

Background/History of Previous Board Action

- Under A.R.S. § 15-1655, the Arizona Board of Regents (“ABOR”) implements the Arizona Teacher’s Academy (“ATA”) pursuant to ABOR Policy 2-235 and distributes the ATA funds between eligible postsecondary institutions.
- Proposition (Prop.) 208 was filed with the Secretary of State on February 14, 2020 proposing to amend A.R.S. §15-1655, among other statutes. Then, SB 1492 passed in May 2020, making several additional changes to A.R.S. §15-1655 that were not included in Prop. 208. In November 2020, Prop. 208 was passed by the voters, after SB 1492 became effective.
- As Prop. 208 did not include the changes from SB 1492, there were two versions of A.R.S. §15-1655 with differences in payment amounts, eligible institutions, and other significant matters.
- On February 13, 2021, the board adopted on first read, and with emergency enactment, an amendment as to waivers of service obligation for circumstances outside the student’s control.
- On March 8, 2021, Governor Ducey signed [HB 2832](#), correcting the conflicts between SB 1492 and Prop 208 as to the Teachers Academy. HB 2832 was enacted as an emergency measure effective January 1, 2021.

Discussion

These proposed revisions will replace and supersede the existing Policy 2-325. It will enable the policy to comply with current Arizona law. It makes the following changes to policy:

Contact Information:

Kris Okazaki, ABOR	kris.okazaki@azregents.edu	602-229-2552
Samantha Blevins, ABOR	samantha.blevins@azregents.edu	602-229-2535

EXECUTIVE SUMMARY

- References A.R.S. §15-1655 for definitions and guidance;
- Adds “a college in this state that is owned, operated or chartered by a qualifying Indian tribe on its own Indian reservation and that offers baccalaureate teacher education programs” to eligible postsecondary institutions;
- Adds the ability to prioritize juniors and seniors, but prohibiting the exclusion of freshman and sophomores;
- Changes the aid distribution of scholarships from flat amounts to:
 - Up to the actual cost of tuition and fees for a maximum of two academic years or four semesters for graduate university students;
 - Up to the actual cost of tuition and fees for a maximum of four academic years or eight semesters for undergraduate university students;
 - Up to the actual cost of tuition and fees for a maximum of two academic years or four semesters for community college students for tuition and fees associated with the student's program of study; or
 - Up to the actual cost of obtaining the requisite course work to satisfy the requirements for teaching a dual enrollment course as adopted by a higher learning commission that accredits degree-granting postsecondary educational institutions in the north central region, including this state;
- Allows part-time students to receive assistance;
- Removes the summer semester from the calculation of the student's postgraduation public service commitment;
- Reorganizes for clarity; and
- Incorporates the amended waiver language from the February 2021 ABOR meeting.

Committee Review and Recommendation

The Academic Affairs and Educational Attainment Committee reviewed this item at its April 1, 2021 meeting, and recommended forwarding the item to the full board for first reading and immediate implementation.

EXECUTIVE SUMMARY

Statutory/Policy Requirements

A.R.S. §15-1655

A.R.S. §15-1626

EXECUTIVE SUMMARY

~~2-325 Arizona Teachers Academy~~

- A. ~~Eligible postsecondary institutions as defined in this policy shall implement the Arizona Teachers Academy and provide scholarships to eligible students enrolled in the Arizona Teachers Academy who commit to teaching in an Arizona public school as further defined in this policy.~~
- B. ~~In implementation of the Arizona Teachers Academy, eligible postsecondary institutions may develop and offer innovative teacher preparation programs that target candidates outside of traditional education degree pathways and include executive and non-degree programs leading to professional teacher certification.~~
- C. ~~Eligible Postsecondary Institutions~~
- ~~1. Eligible postsecondary institutions include universities under the jurisdiction of the board and Arizona community colleges that offer post-baccalaureate programs that lead to certification and have entered into an agreement with the board relative to these programs.~~
 - ~~2. The board shall execute agreements with the Arizona community colleges that qualify as eligible postsecondary institutions prior to making disbursements for costs associated with the Arizona Teachers Academy to those community colleges.~~
- D. ~~Tuition and Fee Scholarships~~
- ~~1. Each year by July 1, board staff shall notify eligible postsecondary institutions of the number of scholarship slots allocated to the institution for the upcoming fiscal year.~~
 - ~~2. Scholarship slot allocations shall be based on prior year enrollment in the Arizona Teachers Academy at the participating institutions and subject to legislative appropriations to the Arizona Teachers Academy fund.~~
 - ~~3. Tuition scholarships are last dollar scholarships that cover the cost of tuition and mandatory fees after all other gift aid is received.~~

EXECUTIVE SUMMARY

4. ~~Scholarship monies that are in excess of the balance between tuition and fees and gift aid can be reallocated within the program at each eligible postsecondary institution to support costs associated with the Arizona Teachers Academy.~~

~~E. Student Eligibility~~

1. ~~Prior to receiving a tuition scholarship, induction services or a national board certification scholarship, a student must sign a student agreement that requires the student to meet the eligibility requirements for the Arizona Teachers Academy and specifies the terms of continuing eligibility, the post-graduation or post-certification service obligations and the student's repayment obligations due to failure to meet the eligibility requirements or service obligations.~~
2. ~~To be eligible for a tuition waiver scholarship, students must meet the following criteria:~~
 - a. ~~Be admitted and enrolled in the Arizona Teachers Academy as an undergraduate or graduate university student or as a post-baccalaureate student at a community college or university.~~
 - b. ~~File a free application for federal student aid (FAFSA) each year enrolled in the Arizona Teachers Academy and accept all federal, state, institutional, and private grants and scholarships awarded prior to the tuition waiver scholarship being applied to outstanding tuition and fees associated with the Arizona Teachers Academy program of study.~~
3. ~~To be eligible for induction services a teacher must be a graduate of the Arizona Teachers Academy and in his or her first year of employment as a teacher in an Arizona public school.~~
4. ~~To be eligible for a National Board Certification scholarship, a teacher must be currently employed in an Arizona public school and seeking National Board Certification through an approved provider as identified by the executive director.~~

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- ~~F. Distributing Monies in The Arizona Teachers Academy Fund Between Eligible Postsecondary Institutions~~
- ~~1. Eligible postsecondary institutions shall provide to the executive director or the executive director's designee, actual full time equivalent enrollment in academy programs, and other documents as requested.~~
 - ~~2. The executive director shall make distributions based on the reported actual full time equivalent enrollment appropriately prorated for the applicable academic period.~~
 - ~~3. The executive director may reallocate unused scholarship slots among the eligible postsecondary institutions.~~
 - ~~4. The executive director shall make a second distribution in the spring semester based on the reallocated scholarship slots.~~
 - ~~5. The executive director shall reimburse eligible postsecondary institutions for inductions services offered in the first year after completion of the Arizona Teachers Academy program. Payments shall be made with the fall semester scholarship reimbursement payment.~~
 - ~~6. The executive director shall distribute monies for National Board Certification to institutions that have entered into an agreement with the board to offer scholarships to Arizona teachers seeking National Board Certification.~~
- ~~G. Support for National Board Certification~~
- ~~1. The executive director shall identify eligible postsecondary institutions that provide support for National Board Certification.~~
 - ~~2. Each eligible postsecondary institution that enters into an agreement with the board for this function shall provide a one-time scholarship to teachers currently employed in an Arizona public school seeking National Board Certification to support the fees associated with certification.~~

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- ~~3. The number of scholarships approved by the board shall be in accordance with the annual academy budget base on the amount of legislative appropriations.~~

~~H. Coordinating Induction Services~~

- ~~1. Eligible postsecondary institutions shall provide induction services to academy graduates during the first year of teaching immediately following completion of the academy. Induction services are only provided in the first year if the graduate is in the process of meeting his or her service obligations within the required timeframe. Institutions are not required to provide induction services to students who have not met the service obligation.~~
- ~~2. Monies for induction will be based on the number of academy graduates that completed in the prior fiscal year.~~
- ~~3. Monies for induction services will be distributed with scholarship slot reimbursement payment.~~
- ~~4. Institutions may be required to report to the board regarding the induction services provided.~~

~~I. Compliance With Arizona Teachers Academy Program and Service Obligations and Conditions of Repayment~~

- ~~1. Prior to receipt of funds a student shall enter into a written agreement, which shall set forth the terms of repayment of funds in the event the recipient does not satisfy the teaching or program obligations.~~
- ~~2. Students who do not successfully complete the academic year in good academic standing or who cease to be enrolled in the Arizona Teachers Academy shall reimburse the board for the total amount of funding received for that year.~~
- ~~3. The executive director or the executive director's designee shall monitor Arizona Teachers Academy graduates' progress toward meeting their teaching obligations.~~

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4. ~~Recipients will have a grace period of 12 months after graduation, or completion of an approved course of study leading to a teaching credential, to sign a teaching contract in an Arizona public school.~~
5. ~~If the recipient has not secured employment in an Arizona public school, the repayment shall begin at the end of the 12 month grace period.~~
6. ~~Students who do not fulfill their obligation to teach in an Arizona public school shall reimburse the board for the proportional amount of the scholarship for tuition and fees that the student received that corresponds to the number of school years the student agreed to teach but did not teach.~~
7. ~~The board staff shall provide to each person in repayment an amortization schedule. There shall be no interest charged and the repayment duration shall be no more than 10 years.~~

~~J. Deferment of the Service Obligation~~

1. ~~The executive director or the executive director's designee, upon written request of a recipient, may grant deferment of time for satisfying the teaching commitment if the recipient:~~
 - a. ~~Is temporarily totally disabled for a period not to exceed 3 years, as established by a sworn affidavit from a qualified physician, or~~
 - b. ~~Is called to active duty in the armed forces of the United States, or~~
 - c. ~~Is enrolled, registered and progressing toward timely degree completion in a full time master's degree program that would delay required full-time teaching requirement to one year following completion of the master's degree program or two years post-bachelor's degree, whichever is less, or~~
 - d. ~~Is unable to fulfill their teaching commitment due to extraordinary circumstances beyond their control.~~

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2. ~~In each case, the recipient must provide complete and verifiable documentation to support the request.~~

~~K. Cancellation of Service Obligation~~

1. ~~The executive director or the executive director's designee, may cancel the service obligation made under this program if it determines that:~~
 - a. ~~The recipient is totally and permanently disabled. The executive director or the executive director's designee shall require a sworn and verified affidavit from a qualified physician, which supports the request.~~
 - b. ~~The recipient has died. The executive director or the executive director's designee shall require a certified copy of the death certificate.~~

~~L. Data Collection and Reporting~~

1. ~~Each eligible postsecondary institution shall provide to the board by July 15 of each year information as requested by board staff to meet the board's reporting requirements under A.R.S. § 15-1655(i).~~
2. ~~Each eligible postsecondary institution shall provide to the board by January 15 of each year information as requested by board staff to meet the board's reporting requirements under A.R.S. § 15-1655(j).~~

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2-325 ARIZONA TEACHERS ACADEMY

- A. AS PROVIDED IN A.R.S. § 15-1655, AND AS FURTHER DEFINED IN THIS POLICY, ELIGIBLE POSTSECONDARY INSTITUTIONS SHALL PROVIDE SCHOLARSHIPS TO ELIGIBLE STUDENTS ENROLLED IN THE ARIZONA TEACHERS ACADEMY, WHO COMMIT TO TEACHING IN ARIZONA PUBLIC SCHOOLS.

- B. POSTSECONDARY INSTITUTION ELIGIBILITY
 - 1. ELIGIBLE POSTSECONDARY INSTITUTIONS ARE DEFINED BY A.R.S. § 15-1655.

 - 2. ARIZONA COMMUNITY COLLEGES AND INDIAN TRIBES THAT QUALIFY AS ELIGIBLE POSTSECONDARY INSTITUTIONS UNDER A.R.S. § 15-1655 SHALL EXECUTE AN AGREEMENT WITH, AND RETURN THE AGREEMENT TO, THE BOARD PRIOR TO THE DISSEMINATION OF ANY TEACHERS ACADEMY FUNDS.

 - 3. ELIGIBLE POSTSECONDARY INSTITUTIONS MAY DEVELOP NEW OR EXISTING TEACHER PREPARATION PROGRAMS THAT ARE STUDENT-FOCUSED AND THAT EMPLOY PROVEN, RESEARCH-BASED MODELS OF BEST PRACTICES.
 - a. PROGRAMS OFFERED AS PART OF THE TEACHERS ACADEMY MAY INCLUDE THE ACCELERATED MODELS PROVIDED BY A.R.S. 15-1655(B).

 - b. WHILE EACH TEACHER ACADEMY ELIGIBLE PROGRAM MAY NOT EXCLUDE SOPHOMORE AND FRESHMAN STUDENTS FROM APPLYING FOR THE PROGRAM, EACH PROGRAM MAY GIVE PRIORITY TO SENIOR AND JUNIOR STUDENTS FOR ANY AVAILABLE SCHOLARSHIPS.

- C. STUDENT ELIGIBILITY
 - 1. TO BE ELIGIBLE FOR AN ARIZONA TEACHER ACADEMY TUITION AND FEES SCHOLARSHIP, STUDENTS MUST MEET THE FOLLOWING CRITERIA:
 - a. BE ADMITTED AND ENROLLED IN THE ARIZONA TEACHERS ACADEMY AS AN UNDERGRADUATE OR

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GRADUATE UNIVERSITY STUDENT OR AS A POST-BACCALAUREATE STUDENT AT A COMMUNITY COLLEGE OR UNIVERSITY.

- b. FILE A FREE APPLICATION FOR FEDERAL STUDENT AID (FAFSA) EACH YEAR ENROLLED IN THE ARIZONA TEACHERS ACADEMY AND ACCEPT ALL FEDERAL, STATE, INSTITUTIONAL, AND PRIVATE GRANTS AND SCHOLARSHIPS AWARDED PRIOR TO THE TUITION WAIVER SCHOLARSHIP BEING APPLIED TO OUTSTANDING TUITION AND FEES ASSOCIATED WITH THE ARIZONA TEACHERS ACADEMY PROGRAM OF STUDY.

- 2. TO BE ELIGIBLE FOR A TUITION SCHOLARSHIP TO EARN DUAL ENROLLMENT ELIGIBILITY, A TEACHER MUST:

- a. BE CURRENTLY TEACHING A DUAL ENROLLMENT COURSE; AND
- b. NEED ADDITIONAL COURSEWORK TO SATISFY THE ACCREDITATION REQUIREMENTS FOR THE ELIGIBLE POSTSECONDARY INSTITUTION.

- 3. PRIOR TO RECEIVING ANY TEACHER ACADEMY FUNDING FOR ANY COVERED PURPOSE UNDER A.R.S. §15-1655, A STUDENT MUST SIGN A STUDENT AGREEMENT THAT REQUIRES THE STUDENT TO MEET THE ELIGIBILITY REQUIREMENTS FOR THE ARIZONA TEACHERS ACADEMY AND SPECIFIES THE TERMS OF CONTINUING ELIGIBILITY, THE POST-GRADUATION OR POST-CERTIFICATION SERVICE OBLIGATIONS AND THE STUDENT'S REPAYMENT OBLIGATIONS DUE TO FAILURE TO MEET THE ELIGIBILITY REQUIREMENTS OR SERVICE OBLIGATIONS.

D. TUITION AND FEE SCHOLARSHIPS

- 1. TUITION AND FEE SCHOLARSHIPS ARE LAST DOLLAR SCHOLARSHIPS THAT COVER THE COST OF TUITION AND FEES AFTER ALL OTHER GIFT AID IS RECEIVED.
- 2. SCHOLARSHIPS PROVIDED THROUGH THE ARIZONA TEACHERS ACADEMY MAY INCLUDE:

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- a. UP TO THE ACTUAL COST OF TUITION AND FEES FOR A MAXIMUM OF TWO ACADEMIC YEARS OR FOUR SEMESTERS FOR GRADUATE UNIVERSITY STUDENTS;
 - b. UP TO THE ACTUAL COST OF TUITION AND FEES FOR A MAXIMUM OF FOUR ACADEMIC YEARS OR EIGHT SEMESTERS FOR UNDERGRADUATE UNIVERSITY STUDENTS;
 - c. UP TO THE ACTUAL COST OF TUITION AND FEES FOR A MAXIMUM OF TWO ACADEMIC YEARS OR FOUR SEMESTERS FOR COMMUNITY COLLEGE STUDENTS FOR TUITION AND FEES ASSOCIATED WITH THE STUDENT'S PROGRAM OF STUDY; OR
 - d. UP TO THE ACTUAL COST OF OBTAINING THE REQUISITE COURSE WORK TO SATISFY THE REQUIREMENTS FOR TEACHING A DUAL ENROLLMENT COURSE AS ADOPTED BY A HIGHER LEARNING COMMISSION THAT ACCREDITS DEGREE-GRANTING POSTSECONDARY EDUCATIONAL INSTITUTIONS IN THE NORTH CENTRAL REGION, INCLUDING THIS STATE.
 - e. FOR PURPOSES OF THIS SECTION, SUMMER TERMS ARE NOT CONSIDERED PART OF THE ACADEMIC YEAR NOR COUNT AS ONE OF THE SCHOLARSHIP SEMESTERS.
- E. SUPPORT FOR NATIONAL BOARD CERTIFICATION
- 1. TO BE ELIGIBLE FOR A NATIONAL BOARD CERTIFICATION SCHOLARSHIP, A TEACHER MUST BE CURRENTLY EMPLOYED IN AN ARIZONA PUBLIC SCHOOL AND SEEKING NATIONAL BOARD CERTIFICATION THROUGH AN APPROVED PROVIDER AS IDENTIFIED BY THE EXECUTIVE DIRECTOR.
 - 2. THE EXECUTIVE DIRECTOR SHALL IDENTIFY POSTSECONDARY INSTITUTIONS THAT PROVIDE SUPPORT FOR NATIONAL BOARD CERTIFICATION.
 - 3. EACH POSTSECONDARY INSTITUTION THAT ENTERS INTO AN AGREEMENT WITH THE BOARD FOR NATIONAL BOARD

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CERTIFICATION FUNDING SHALL PROVIDE A ONE-TIME SCHOLARSHIP TO TEACHERS CURRENTLY EMPLOYED IN AN ARIZONA PUBLIC SCHOOL SEEKING NATIONAL BOARD CERTIFICATION TO SUPPORT THE FEES ASSOCIATED WITH INITIAL CERTIFICATION.

4. THE AMOUNT OF FUNDING AVAILABLE FOR NATIONAL BOARD CERTIFICATION SHALL BE APPROVED BY BOARD.

F. COORDINATING INDUCTION SERVICES

1. ELIGIBLE POSTSECONDARY INSTITUTIONS SHALL PROVIDE INDUCTION SERVICES TO ACADEMY GRADUATES DURING THEIR FIRST YEAR OF TEACHING IMMEDIATELY FOLLOWING COMPLETION OF THE TEACHERS ACADEMY.
 - a. INDUCTION SERVICES ARE ONLY PROVIDED IN THE FIRST YEAR IF THE GRADUATE IS IN THE PROCESS OF MEETING HIS OR HER SERVICE OBLIGATIONS WITHIN THE REQUIRED TIMEFRAME.
 - b. INSTITUTIONS ARE NOT REQUIRED TO PROVIDE INDUCTION SERVICES TO STUDENTS WHO HAVE NOT MET THE SERVICE OBLIGATION.
2. FUNDING FOR INDUCTION SERVICES WILL BE BASED ON THE NUMBER OF ACADEMY GRADUATES THAT GRADUATED IN THE PRIOR FISCAL YEAR.
3. INSTITUTIONS MAY BE REQUIRED TO REPORT TO THE BOARD REGARDING THE INDUCTION SERVICES PROVIDED.

G. DISTRIBUTING MONIES IN THE ARIZONA TEACHERS ACADEMY FUND TO ELIGIBLE POSTSECONDARY INSTITUTIONS

1. EACH YEAR BY JULY 1, BOARD STAFF SHALL NOTIFY ELIGIBLE POSTSECONDARY INSTITUTIONS OF THE AMOUNT OF FUNDS ALLOCATED TO THE INSTITUTION FOR THE UPCOMING FISCAL YEAR.
 - a. SCHOLARSHIP FUND ALLOCATIONS SHALL BE BASED ON PRIOR YEAR ENROLLMENT IN THE ARIZONA TEACHERS ACADEMY AT THE PARTICIPATING INSTITUTIONS AND SUBJECT TO LEGISLATIVE

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- APPROPRIATIONS AND ANY OTHER SOURCES OF REVENUE TO THE ARIZONA TEACHERS ACADEMY FUND.
- b. TUITION SCHOLARSHIP FUNDING IS LAST DOLLAR SCHOLARSHIPS THAT COVER THE COST OF TUITION AND FEES AFTER ALL OTHER GIFT AID IS RECEIVED.
2. ELIGIBLE POSTSECONDARY INSTITUTIONS SHALL PROVIDE TO THE EXECUTIVE DIRECTOR OR THE EXECUTIVE DIRECTOR'S DESIGNEE, ACTUAL AMOUNT OF SCHOLARSHIPS PROVIDED IN ACADEMY PROGRAMS, AND ANY OTHER DOCUMENTS AND RELATED DATA AS REQUESTED.
 3. THE EXECUTIVE DIRECTOR SHALL MAKE DISTRIBUTIONS BASED ON THE REPORTED ACTUAL AMOUNT OF SCHOLARSHIPS PROVIDED APPROPRIATELY PRORATED FOR THE APPLICABLE ACADEMIC PERIOD.
 - a. THE EXECUTIVE DIRECTOR MAY REALLOCATE UNUSED SCHOLARSHIP FUNDS AMONG THE ELIGIBLE POSTSECONDARY INSTITUTIONS.
 - b. THE EXECUTIVE DIRECTOR SHALL REIMBURSE ELIGIBLE POSTSECONDARY INSTITUTIONS FOR INDUCTION SERVICES OFFERED IN THE FIRST YEAR AFTER COMPLETION OF THE ARIZONA TEACHERS ACADEMY PROGRAM.
 - c. THE EXECUTIVE DIRECTOR SHALL DISTRIBUTE MONIES FOR NATIONAL BOARD CERTIFICATION TO INSTITUTIONS THAT HAVE ENTERED INTO AN AGREEMENT WITH THE BOARD TO OFFER SCHOLARSHIPS TO ARIZONA TEACHERS SEEKING NATIONAL BOARD CERTIFICATION
 4. THE EXECUTIVE DIRECTOR MAY PRORATE ANY DISTRIBUTED FUNDING BASED ON THE AMOUNT OF DOLLARS AVAILABLE.
 5. THE EXECUTIVE DIRECTOR MAY ESTABLISH A PROCESS FOR AND DISTRIBUTE FUNDS TO COVER THE COSTS OF OBTAINING A TEACHING CERTIFICATE, INCLUDING THE

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COST OF EXAMS REQUIRED FOR CERTIFICATION. IF A STUDENT DOES NOT FOLLOW THE PROSCRIBED PAYMENT PROCESS, THEY MAY NOT BE ELIGIBLE FOR REIMBURSEMENT.

H. COMPLIANCE WITH ARIZONA TEACHERS ACADEMY PROGRAM AND SERVICE OBLIGATIONS AND CONDITIONS OF REPAYMENT

1. PRIOR TO RECEIPT OF FUNDS, A STUDENT SHALL ENTER INTO A WRITTEN AGREEMENT AS DISCUSSED IN SUBSECTION C (3) OF THIS POLICY, WHICH SHALL SET FORTH THE TERMS OF REPAYMENT OF FUNDS IN THE EVENT THE RECIPIENT DOES NOT SATISFY THE TEACHING OR PROGRAM OBLIGATIONS.
2. IF A STUDENT ENROLLS IN A SUMMER TERM, THAT TERM MAY NOT BE INCLUDED IN THE CALCULATION OF THE STUDENT'S POSTGRADUATION PUBLIC SERVICE COMMITMENT.
3. STUDENTS WHO DO NOT SUCCESSFULLY COMPLETE THE ACADEMIC YEAR IN GOOD ACADEMIC STANDING OR WHO CEASE TO BE ENROLLED IN THE ARIZONA TEACHERS ACADEMY SHALL REIMBURSE THE BOARD FOR THE TOTAL AMOUNT OF FUNDING RECEIVED FOR THAT YEAR.
4. THE EXECUTIVE DIRECTOR OR THE EXECUTIVE DIRECTOR'S DESIGNEE SHALL MONITOR ARIZONA TEACHERS ACADEMY GRADUATES' PROGRESS TOWARD MEETING THEIR TEACHING OBLIGATIONS.
5. RECIPIENTS WILL HAVE A GRACE PERIOD OF 12 MONTHS AFTER GRADUATION, OR COMPLETION OF AN APPROVED COURSE OF STUDY LEADING TO A TEACHING CREDENTIAL, TO SIGN A TEACHING CONTRACT IN AN ARIZONA PUBLIC SCHOOL. IF THE RECIPIENT HAS NOT SECURED EMPLOYMENT IN AN ARIZONA PUBLIC SCHOOL, THE REPAYMENT SHALL BEGIN AT THE END OF THE 12-MONTH GRACE PERIOD.
6. STUDENTS WHO DO NOT FULFILL THEIR OBLIGATION TO TEACH IN AN ARIZONA PUBLIC SCHOOL SHALL REIMBURSE THE BOARD FOR THE PROPORTIONAL AMOUNT OF THE SCHOLARSHIP FOR TUITION AND FEES THAT THE STUDENT

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RECEIVED THAT CORRESPONDS TO THE NUMBER OF SCHOOL YEARS THE STUDENT AGREED TO TEACH BUT DID NOT TEACH.

7. THE BOARD STAFF OR DESIGNEE SHALL PROVIDE TO EACH PERSON IN REPAYMENT AN AMORTIZATION SCHEDULE. THERE SHALL BE NO INTEREST CHARGED AND THE REPAYMENT DURATION SHALL BE NO MORE THAN 10 YEARS.

I. DEFERMENT OF THE SERVICE OBLIGATION

1. THE EXECUTIVE DIRECTOR OR THE EXECUTIVE DIRECTOR'S DESIGNEE, UPON WRITTEN REQUEST OF A RECIPIENT, MAY GRANT DEFERMENT OF TIME FOR SATISFYING THE TEACHING COMMITMENT IF THE RECIPIENT:
 - a. IS TEMPORARILY UNABLE TO WORK AND/OR DISABLED FOR A PERIOD NOT TO EXCEED 3 YEARS, AS ESTABLISHED BY WRITTEN DOCUMENTATION FROM A HEALTH CARE PROVIDER OR
 - b. IS CALLED TO ACTIVE DUTY IN THE ARMED FORCES OF THE UNITED STATES, OR
 - c. IS ENROLLED, REGISTERED AND PROGRESSING TOWARD TIMELY DEGREE COMPLETION IN A FULL-TIME MASTER'S DEGREE PROGRAM THAT WOULD DELAY REQUIRED FULL-TIME TEACHING REQUIREMENT TO ONE YEAR FOLLOWING COMPLETION OF THE MASTER'S DEGREE PROGRAM OR TWO YEARS POST-BACHELOR'S DEGREE, WHICHEVER IS LESS, OR
 - d. IS UNABLE TO FULFILL THEIR TEACHING COMMITMENT DUE TO EXTRAORDINARY CIRCUMSTANCES BEYOND THEIR CONTROL.
2. IN EACH CASE, THE RECIPIENT MUST PROVIDE COMPLETE AND VERIFIABLE DOCUMENTATION TO SUPPORT THE REQUEST.

J. CANCELLATION OF SERVICE OBLIGATION

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1. THE EXECUTIVE DIRECTOR OR THE EXECUTIVE DIRECTOR'S DESIGNEE, MAY CANCEL THE SERVICE OBLIGATION MADE UNDER THIS PROGRAM IF IT DETERMINES THAT:
 - a. THE RECIPIENT IS TOTALLY AND PERMANENTLY DISABLED AS ESTABLISHED BY WRITTEN DOCUMENTATION BY A HEALTH CARE PROVIDER.
 - b. THE RECIPIENT HAS DIED. THE EXECUTIVE DIRECTOR OR THE EXECUTIVE DIRECTOR'S DESIGNEE SHALL REQUIRE A COPY OF THE DEATH CERTIFICATE.

K. DATA COLLECTION AND REPORTING

1. EACH ELIGIBLE POSTSECONDARY INSTITUTION SHALL PROVIDE TO THE BOARD BY JULY 15 OF EACH YEAR, OR AS SPECIFIED BY THE EXECUTIVE DIRECTOR OR THE EXECUTIVE DIRECTOR'S DESIGNEE, INFORMATION AS REQUESTED BY BOARD STAFF TO MEET THE BOARD'S REPORTING REQUIREMENTS UNDER A.R.S. §15-1655(H).
2. EACH ELIGIBLE POSTSECONDARY INSTITUTION SHALL PROVIDE TO THE BOARD BY JANUARY 15 OF EACH YEAR, OR AS SPECIFIED BY THE EXECUTIVE DIRECTOR OR THE EXECUTIVE DIRECTOR'S DESIGNEE, INFORMATION AS REQUESTED BY BOARD STAFF TO MEET THE BOARD'S REPORTING REQUIREMENTS UNDER A.R.S. §15-1655(G).

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EXECUTIVE SUMMARY

Item Name: Proposed Revisions to ABOR Policies 4-201 “Definitions for Residency Classifications”, 4-203 “Requirements to be Considered in Determining an Individual’s Residency Classification for Tuition Purposes”, 4-205 “Residency Classification Appeal Procedures” and Repeal of 4-206 “Miscellaneous Provisions” (First Reading)

Action Item

Requested Action: The board office asks the board to review on first reading the proposed revisions to ABOR Policies 4-201 “Definitions for Residency Classifications”, 4-203 “Requirements to be Considered in Determining an Individual’s Residency Classification for Tuition Purposes”, 4-205 “Residency Classification Appeal Procedures” and Repeal of 4-206 “Miscellaneous Provisions”.

Background/History of Previous Board Action

A tri-university work group of ABOR and University attorneys and staff developed the proposed revisions to the ABOR residency policies, which are not intended to limit the definition of residency, but are intended to clarify for students and university staff how residency is determined.

Discussion

The proposed revisions offer the following clarifications:

4-201

1. Defines objective evidence.
2. Clarifies the definition of parent to include adoptive parent and custodial parent.
3. Clarifies the definition of student to mean a person admitted and eligible to enroll in classes.

4-203

1. This replaces 4-203 in its entirety, as the changes involved significant reorganization of multiple provisions, the addition of the provisions from 4-206, and changes to comply with new law.

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2. Adds new language to comply with the Johnny Isakson and David P. Roe, M.D. Veterans Health Care and Benefits Improvement Act of 2020.
3. Reorganizes the evidentiary requirements for continuous physical presence, Arizona residency, and financial independence to one section of the policy and clarifies the exceptions to those requirements.
4. Clarifies that to establish in-state residency for tuition purposes, the student must establish the discussed factors by a preponderance of the evidence.
5. Clarifies the current requirement that all evidence shall be considered under the rebuttable presumptions that: a non-resident student's presence in Arizona is primarily for the purpose of education and not to establish domicile; an individual cannot establish residency or domicile while in Arizona primarily for the purposes of education; an individual cannot establish residency for tuition purposes while attending an educational institution in Arizona as a full-time student; that decisions of an individual as to the establishment of residency and domicile are generally made after the completion of an education, and not before.
6. Clarifies what the classification officer and the review committee will consider.
7. Incorporates the provisions of 4-206.

4-205

1. Clarifies that a student is reviewing a residency classification decision.
2. Clarifies that a failure to timely request review a residency classification decision makes the residency determination final.
3. Allows hearing notices and decisions to be sent via university email.
4. Allows the university to set a deadline to submit evidence to the review committee.
5. Clarifies that the university has 10 calendar days to issue a decision, excluding Saturday, Sunday and university recognized holidays, following the review hearing.

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4-206

1. Repeals the policy and incorporates all of the provisions from this policy into 4-203.

Committee Review and Recommendation

The Academic Affairs and Educational Attainment Committee reviewed this item at its April 1, 2021 meeting, and recommended forwarding the item to the full board for first reading and subsequent approval.

Statutory/Policy Requirements

A.R.S. §§ 15-1801, *et seq.*

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B. RESIDENCY CLASSIFICATION FOR TUITION PURPOSES

4-201 Definitions for Residency Classification

For purposes of residency classification, unless the context otherwise provides or requires:

- A. "Armed forces of the United States" means the Army, the Navy, the Air Force, the Marine Corps, the Coast Guard, the Commissioned Corps of the United States Public Health Services and the National Oceanographic and Atmospheric Administration, the National Guard and any military reserve unit of any branch of the armed forces of the United States.
- B. "Board" means the Arizona Board of Regents.
- C. "Classification officer" means a university administrator authorized by the president to classify individuals for residency purposes.
- D. "Continuous attendance" means enrollment at an educational institution in Arizona, including a public university, community college or high school, as a full-time student for an entire and uninterrupted academic year from the beginning of the period for which continuous attendance is claimed. An individual need not attend summer sessions or other intersessions beyond the traditional academic year in order to maintain continuous attendance.
- E. "Domicile" OR "DOMICILED" means an individual's true, fixed and permanent home and place of habitation. It is the place where the individual lives, intends to remain, and to which the individual intends to return when leaving without intending to establish a new domicile elsewhere.
- F. "Emancipated individual" means an individual who is neither under a legal duty of service to ~~his or her~~ THEIR parent(s) nor entitled to the support of ~~his or her~~ THEIR parent(s).
- G. "FINANCIAL INDEPENDENCE" MEANS THE INDIVIDUAL IS CAPABLE OF PAYING FOR THE INDIVIDUAL'S LIVING EXPENSES (I.E., HOUSING, UTILITIES, TRANSPORTATION, INSURANCE, GROCERIES/FOOD) AND UNIVERSITY TUITION WITH FUNDS EARNED BY THE INDIVIDUAL OR WITH FUNDS THAT ARE THE SOLE PROPERTY OF THE INDIVIDUAL, WITHOUT RECEIVING SIGNIFICANT FINANCIAL SUPPORT FROM SOMEONE OTHER THAN A SPOUSE.
- H. "Guardian" means a legal guardian.

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- I. "Last day of registration" means the final day of regular registration for credit for a semester as published by the university.
- J. "Minor" means an individual under the age of 18.
- K. "OBJECTIVE EVIDENCE" MEANS DOCUMENTATION OR INFORMATION OTHER THAN AN INDIVIDUAL'S OWN STATEMENT(S) OF INTENT.
- L. "Parent" means an individual's FATHER OR MOTHER (INCLUDING ADOPTIVE FATHER OR MOTHER), OR IF ONE PARENT HAS CUSTODY, THAT PARENT, or the legal guardian of an unemancipated individual provided there is no evidence indicating that the guardianship was created primarily for the purpose of conferring the classification of resident on the individual.
- M. "President" means the president of a university or the president's designee.
- N. "Review committee" means a committee at each university designated by the president to review residency classification determinations.
- O. "State" or "this state" means the State of Arizona.
- P. "Student" means any individual ~~registered~~ WHO HAS BEEN ADMITTED OR IS ELIGIBLE TO ENROLL in one or more classes.
- Q. "University" means the University of Arizona, Arizona State University, Northern Arizona University, or any other university governed by the Board.

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~~4-203 Requirements to be Considered in Determining an Individual's Residency Classification for Tuition Purposes~~

- ~~A. Residency Classification for tuition purposes is to be determined in accordance with Arizona Law and Board Policy.~~
- ~~B. Except as provided in board policy, to establish in-state residency for tuition purposes, the individual must demonstrate continuous presence in Arizona and objective intent as described below.~~
 - ~~1. The individual must provide objective evidence of continuous presence in Arizona for 12 months and;~~
 - ~~2. The individual must provide objective evidence of intent to be a resident for tuition purposes of Arizona as demonstrated by the severance of ties to the individual's former state of residence. Intent will be evaluated by the classification officer. No one factor is determinative. Residency classification for tuition purposes must be established by a preponderance of the evidence. Any relevant evidence may be considered, including the following:~~
 - ~~a. Objective evidence of financial independence. Indicators of financial independence include:
 - ~~a. Place of employment and proof of earnings;~~
 - ~~b. Other sources of support;~~
 - ~~c. Proof of filing Arizona state income tax returns;~~
 - ~~d. Residence claimed on federal income tax returns of applicant and/or parents;~~
 - ~~e. Veteran status; and~~
 - ~~f. Whether claimed as a dependent for income tax purposes by a parent or any other individual for two years immediately preceding the request for residency classification.~~~~
 - ~~b. Once established, residency for tuition purposes is not lost due only to the student's receipt of funds from a source outside Arizona.~~
 - ~~c. State in which motor vehicle is registered.~~
 - ~~d. Source of payment for the individual's auto insurance policies.~~

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- e. ~~Date of issuance and state issuing driver's license or state identification card.~~
 - f. ~~Employment history~~
 - g. ~~The transfer of major banking services to Arizona~~
 - h. ~~Applications for loans, scholarships, grants in aid, or other such assistance~~
 - i. ~~Voter registration~~
 - j. ~~Place of prior attendance in educational institutions, including high schools, and any information held by such schools affecting domicile~~
 - k. ~~Marital status and work record of registrant and spouse~~
 - l. ~~Change in permanent address on all pertinent records~~
 - m. ~~State in which registered with Selective Service~~
 - n. ~~Military records~~
 - o. ~~Ownership of real property~~
 - p. ~~All other materials of whatever kind or source, which may have a bearing on determining domicile or residency.~~
3. ~~All of the evidence is weighed under the presumption that a non-resident student's presence in Arizona is primarily for the purpose of education and not to establish domicile, and that decisions of an individual as to the intent to establish domicile are generally made after the completion of an education and not before.~~
4. ~~Evidence indicating intent must exist at the beginning of and be maintained throughout the 12 month period of continuous presence needed to establish residency classification. Acts or events occurring less than 12 months before the last day of registration may be considered as evidence of the lack of such intent.~~
5. ~~A statement of intent by the student should be weighed in light of the fact that the student knows that he or she will realize a~~

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~~substantial reduction in tuition by being classified as a resident for tuition purposes.~~

- ~~6. Each item presented for determination shall be subject to the classification officer's or review committee's decision as to the weight to be given to it, and such officer or committee shall be the sole judge of the authenticity or truthfulness of any material or statements submitted as supportive evidence. The classification officer may require original or certified copies of documentation.~~
 - ~~7. If a minor applies for classification as a resident and alleges that he or she is an emancipated individual, that individual must also establish that:
 - ~~a. He or she is not living with a parent; and~~
 - ~~b. There has been a complete severance of the parental relationship to all legal rights and liabilities, including but not limited to care, custody, control, and service.~~~~
 - ~~8. Unless the contrary appears to the satisfaction of the classification officer or review committee making a classification determination, it shall be presumed that:
 - ~~a. No individual has established residency for tuition purposes in Arizona while attending any education institution in Arizona as a full-time student in the absence of objective evidence to the contrary.~~
 - ~~b. If an individual is absent from Arizona for more than 30 days they must provide objective evidence that they retained their Arizona domicile.~~~~
- ~~C. Subject to ABOR Policy 4-102, residency can also be established by qualifying under one of the following categories:~~
- ~~1. The individual is domiciled in Arizona and:
 - ~~a. The domicile of one or both of the individual's parents is in Arizona and~~
 - ~~b. One or both of the individual's parents are entitled to claim the individual as a dependent child for federal state tax~~~~

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~~purposes (whether or not the parent actually claims the individual as a dependent child).~~

- ~~2. The individual is domiciled in Arizona and~~
 - ~~a. The individual's spouse has established domicile in Arizona for at least 12 months immediately preceding the last day of registration and the spouse has demonstrated financial independence,~~
 - ~~b. The individual's spouse is entitled to claim the individual as an exemption for federal and state tax purposes, and~~
 - ~~c. The individual has provided objective evidence of the spouse's Arizona domicile and financial independence and is entitled to claim the individual as an exemption for income tax purposes.~~

- ~~3. The individual is domiciled in Arizona and is:~~
 - ~~a. Employed by an employer which transferred the individual to Arizona for employment purposes, or~~
 - ~~b. The spouse of such an employee, or~~
 - ~~c. An employee of an Arizona employer who is taking not more than six credit hours solely through electronic course delivery at employer-sanctioned sites in Arizona, when the employer is required to pay additional site fees or transmission costs and~~
 - ~~d. "Transfer" means an individual who was transferred by his or her employer fewer than 12 months prior to the term in question, is not self-employed or employed in a family-owned business not previously operating in Arizona, and can provide proof of payment or reimbursement of moving expenses by his/her employer.~~

- ~~4. The individual is domiciled in Arizona and an employee of a public school district in Arizona and is under contract to teach on a full-time basis, or is employed as a full-time noncertified classroom aide at a public school within that school district. For purposes of this paragraph, the individual is eligible to pay in-state tuition only for courses necessary to complete the requirements for certification by~~

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~~the State Board of Education to teach in a public school district in Arizona. No member of the individual's family is eligible for classification as an in-state student pursuant to this paragraph, although they may qualify under other exceptions.~~

~~The universities:~~

~~a. Shall establish uniform procedures to determine whether courses taken by a teacher or classroom aide qualify under this section.~~

~~b. Shall consider charter schools as public schools consistent with Arizona statutes.~~

~~c. May apply this section to teachers and classroom aides from private schools where those private schools require that teachers hold Arizona teacher certification.~~

~~5. The individual is a member of the armed forces of the United States stationed in Arizona pursuant to military orders or is the spouse or dependent child of that individual who is a member of the armed forces of the United States stationed in Arizona pursuant to military orders at the time the spouse or dependent child is accepted for admission.~~

~~6. The individual is a member of the armed forces of the United States stationed outside of Arizona pursuant to military orders or is the spouse or dependent child of that individual and the individual claimed Arizona as their legal residence for at least twelve consecutive months prior to the last date of registration. The individual claiming residency status under this provision is required to:~~

~~a. provide a copy of the military form DD-2058 which verifies his or her state of legal residence; and~~

~~b. if applicable, provide evidence of having filed an Arizona Resident Income Tax Return with the Arizona Department of Revenue for the prior tax year on all income from all sources.~~

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- ~~7. The individual meets one of the following the requirements in ABOR policy 4-203(C)(7)(a) or ABOR policy 4-203(C)(7)(b) and (c) as follows:~~
- ~~a. The individual holds an honorable discharge from the uniformed services of the United States from either active duty or reserve or National Guard status, or has retired from active duty or reserve or National Guard status. Such individual shall be granted immediate classification as an in-state student and, while continuously enrolled, does not lose in-state student classification if the individual has demonstrated objective evidence of intent to be a resident of Arizona that, for the purposes of this subsection, includes at least one of the following:~~
- ~~i. Registration to vote in Arizona.~~
 - ~~ii. An Arizona driver license.~~
 - ~~iii. Arizona motor vehicle registration.~~
 - ~~iv. Employment history in Arizona.~~
 - ~~v. Transfer of major banking services to Arizona.~~
 - ~~vi. Change of permanent address on all pertinent records.~~
 - ~~vii. Other materials of whatever kind or source relevant to domicile or residency status.~~
- ~~b. An individual who meets any of the requirements prescribed in ABOR policy 4-203(C)(7)(c) shall be granted immediate classification as an in-state student and does not lose in-state student classification if the individual has demonstrated objective evidence of intent to be a resident of this state that, for the purposes of this subsection, includes at least one of the following:~~
- ~~i. Registration to vote in Arizona.~~
 - ~~ii. An Arizona driver license.~~
 - ~~iii. Arizona motor vehicle registration.~~
 - ~~iv. Employment history in Arizona.~~
 - ~~v. Transfer of major banking services to Arizona.~~
 - ~~vi. Change of permanent address on all pertinent records.~~
 - ~~vii. Other materials of whatever kind or source relevant to domicile or residency status.~~
- ~~c. An individual who meets any of the following requirements is~~

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~~entitled to immediate classification as an in-state student if that individual has demonstrated objective evidence of intent to be a resident of this state as prescribed in ABOR policy 4-203(C)(7)(b):~~

- ~~i. The individual is a veteran as defined in title 38 of the United States Code who, while using educational assistance under 38 United States Code chapter 30 or 33, enrolls in a university under the jurisdiction of the Arizona Board of Regents within three years after the veteran's discharge from active duty service of ninety or more days or who remains continuously enrolled beyond the three-year period following the discharge of the veteran.~~
- ~~ii. The individual does not meet the requirements prescribed in paragraph iii or iv of this subsection and, while using educational assistance under 38 United States Code chapter 30 or 33, enrolls in a university under the jurisdiction of the Arizona Board of Regents within three years after the veteran's discharge from active duty service of ninety or more days or remains continuously enrolled beyond the three-year period following the discharge of the veteran.~~
- ~~iii. The individual, while using benefits under the marine gunnery Sergeant John David Fry Scholarship prescribed in 38 United States Code section 3311(b)(9), enrolls in a university under the jurisdiction of the Arizona Board of Regents.~~
- ~~iv. The individual, while using transferred post-9/11 G.I. Bill benefits pursuant to 38 United States Code section 3319 during a time in which the transferor is a member of the uniformed services serving on active duty, enrolls in a university under the jurisdiction of the Arizona Board of Regents.~~
- ~~v. The individual is otherwise described in 38 United States Code section 3679(c).~~

~~8. Subject to the requirements of ABOR Policy 4-102:~~

- ~~a. The individual is an enrolled member of an Indian tribe~~

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~~recognized by the United States Department of Interior whose reservation land lies wholly or partially in Arizona and extends into another state and is a resident of the reservation.~~

~~b. For purposes of residency classification, enrollment as a tribal member in a federally recognized Arizona tribe will be sufficient to establish residency for tuition purposes.~~

~~9. The individual is domiciled within 75 miles of the Arizona border in Clark County, Nevada or Washington or Kane Counties, Utah, or in San Bernardino, Imperial, or Riverside Counties in California, including the cities of Needles, Blythe, El Centro, Brawley, and Winter Haven, and is enrolling in a total of no more than 6 credit hours per semester offered in Mohave, La Paz, or Yuma Counties, Arizona by a university under the jurisdiction of the Arizona Board of Regents; or the individual is domiciled within 75 miles of the Arizona border in Grant, Hidalgo, or Luna Counties in New Mexico and is enrolling in a total of no more than 6 credit hours per semester offered in Cochise County, Arizona by a university under the jurisdiction of the Arizona Board of Regents. This program is designed to reduce excess capacity; therefore, the Presidents of the universities shall assure that classifying the individual as a resident in their respective programs do not result in denying course offerings to Arizona residents or result in additional expenditures being required for course offerings.~~

~~10. The individual is a doctoral graduate student who is a candidate for a degree, having completed all requirements for the degree except the dissertation, and who qualified as a resident student immediately prior to being eligible to begin his or her dissertation.~~

~~11. The individual is a graduate assistant or graduate associate at a university under the jurisdiction of the Arizona Board of Regents whose assigned teaching or research responsibilities meet the guidelines established by the university for designation as a resident student.~~

~~12. The individual has participated in the AmeriCorps program or the Volunteers in Service to America program for at least one year in Arizona.~~

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- ~~D. Subject to ABOR Policy 4-102 an individual who does not hold a visa that requires the individual to maintain a foreign domicile or that otherwise prohibits establishing domicile in Arizona shall be classified as a resident if the individual can establish that on or before the last day of registration the individual satisfied one of the following criteria:~~
- ~~1. Meets the requirements for classification as a resident for tuition purposes, or~~
 - ~~2. Qualifies as a resident refugee student by virtue of having been granted refugee status in accordance with all applicable laws of the United States and having met all other requirements for domicile in this Arizona; provided that in establishing domicile, the individual must not hold a visa that prohibits establishing domicile in Arizona.~~
- ~~E. Subject to ABOR Policy 4-102 (Non Resident Tuition), a full-time student admitted and enrolled at a university who obtains resident status by virtue of ABOR Policy 4-203B.3 (Requirements for Resident Status) does not lose resident status while in continuous attendance toward the degree for which currently enrolled.~~
- ~~F. The domicile of an unemancipated person is that of either parent. Subject to ABOR Policy 4-102 (Non Resident Tuition), any unemancipated person who is a student admitted and enrolled at a university and who remains in this state when the person's parent, who had been domiciled in this state, removes from this state does not lose resident status while in continuous attendance toward the degree for which currently enrolled.~~

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4-203 REQUIREMENTS TO BE CONSIDERED IN DETERMINING AN INDIVIDUAL'S RESIDENCY CLASSIFICATION FOR TUITION PURPOSES

- A. RESIDENCY CLASSIFICATION FOR TUITION PURPOSES IS TO BE DETERMINED IN ACCORDANCE WITH ARIZONA LAW AND BOARD POLICY.

- B. UNLESS AN EXCEPTION EXISTS IN BOARD POLICY, ALL STUDENTS SEEKING CLASSIFICATION AS AN IN-STATE RESIDENT FOR TUITION PURPOSES MUST ESTABLISH, BY A PREPONDERANCE OF THE EVIDENCE, ALL OF THE FOLLOWING THREE FACTORS:
 - 1. CONTINUOUS PHYSICAL PRESENCE: THE STUDENT HAS BEEN CONTINUOUSLY PHYSICALLY PRESENT IN ARIZONA FOR THE 12 CALENDAR MONTHS IMMEDIATELY PRECEDING THE LAST DAY OF REGISTRATION FOR THE TERM WHICH THE STUDENT IS SEEKING CLASSIFICATION AS AN IN-STATE RESIDENT FOR TUITION PURPOSES, AS DEMONSTRATED BY OBJECTIVE EVIDENCE. ANY RELEVANT EVIDENCE MAY BE CONSIDERED, INCLUDING THE FOLLOWING CATEGORIES OF EVIDENCE; HOWEVER, NO SINGLE CATEGORY IS DETERMINATIVE:
 - a. OWNERSHIP OR LEASE OF PROPERTY;
 - b. BANK OR OTHER FINANCIAL RECORDS REFLECTING CONTINUOUS PRESENCE IN ARIZONA;
 - c. UTILITY BILLS/RECORDS OF CONTINUOUS USAGE;
 - d. STATE AND FEDERAL TAX RETURNS;
 - e. EMPLOYMENT HISTORY, INCLUDING RECORDS OF ARIZONA EMPLOYMENT;
 - f. ALL OTHER MATERIALS OF WHATEVER KIND OR SOURCE, WHICH MAY HAVE A BEARING ON DETERMINING CONTINUOUS PRESENCE.

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2. ARIZONA RESIDENCY: THE STUDENT IS AN ARIZONA RESIDENT, AND ARIZONA IS THE STUDENT'S DOMICILE AS DEMONSTRATED BY OBJECTIVE EVIDENCE. ANY RELEVANT EVIDENCE MAY BE CONSIDERED, INCLUDING THE FOLLOWING CATEGORIES OF EVIDENCE; HOWEVER, NO SINGLE CATEGORY IS DETERMINATIVE:
 - a. THE SEVERANCE OF TIES TO THE STUDENT'S FORMER STATE OF RESIDENCE;
 - b. DATE OF REGISTRATION AND STATE IN WHICH MOTOR VEHICLE IS REGISTERED;
 - c. DATE OF ISSUANCE AND STATE ISSUING DRIVER'S LICENSE OR STATE IDENTIFICATION CARD;
 - d. EMPLOYMENT HISTORY, INCLUDING DATES AND LOCATION OF EMPLOYMENT AND EMPLOYER;
 - e. THE TRANSFER OF MAJOR BANKING SERVICES TO ARIZONA;
 - f. STATE WHERE THE STUDENT IS REGISTERED TO VOTE, DATE OF REGISTRATION, AND WHETHER STUDENT HAS VOTED IN ARIZONA ELECTION;
 - g. PLACE OF PRIOR ATTENDANCE IN EDUCATIONAL INSTITUTIONS, INCLUDING HIGH SCHOOLS, AND ANY INFORMATION HELD BY SUCH SCHOOLS AFFECTING DOMICILE;
 - h. MARITAL STATUS AND EMPLOYMENT HISTORY OF SPOUSE;
 - i. ADDRESS PROVIDED/GIVEN BY STUDENT ON ALL PERTINENT RECORDS;
 - j. STATE IN WHICH REGISTERED WITH SELECTIVE SERVICE;
 - k. MILITARY RECORDS;
 - l. OWNERSHIP OF REAL PROPERTY;

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- m. TAX RECORDS; AND
 - n. ALL OTHER MATERIALS OF WHATEVER KIND OR SOURCE, WHICH MAY HAVE A BEARING ON DETERMINING DOMICILE OR RESIDENCY.
3. FINANCIAL INDEPENDENCE: THE STUDENT IS FINANCIALLY INDEPENDENT FOR THE TWELVE MONTHS IMMEDIATELY PRECEDING THE LAST DAY OF REGISTRATION, AS DEMONSTRATED BY OBJECTIVE EVIDENCE. ANY RELEVANT EVIDENCE MAY BE CONSIDERED, INCLUDING THE FOLLOWING CATEGORIES OF EVIDENCE; HOWEVER, NO SINGLE CATEGORY IS DETERMINATIVE:
- a. DATES OF EMPLOYMENT AND PROOF OF EMPLOYMENT EARNINGS;
 - b. DOCUMENTATION OF ALL SOURCES OF FINANCIAL/ECONOMIC SUPPORT;
 - c. APPLICATIONS FOR LOANS, SCHOLARSHIPS, GRANTS-IN-AID, OR OTHER SUCH ASSISTANCE;
 - d. DOCUMENTATION REFLECTING SOURCE OF FUNDS USED TO PAY FOR STUDENT'S UNIVERSITY TUITION AND LIVING EXPENSES (I.E., HOUSING, UTILITIES, TRANSPORTATION, GROCERIES/FOOD, ETC.);
 - e. WHETHER THE STUDENT IS OR WAS CLAIMED AS A DEPENDENT FOR INCOME TAX PURPOSES DURING THE MOST RECENT TAX YEAR PRECEDING THE TERM FOR WHICH THE STUDENT IS SEEKING RESIDENT CLASSIFICATION;
 - f. STUDENT'S STATE AND FEDERAL INCOME TAX RETURNS;
 - g. VETERAN STATUS; AND
 - h. ALL OTHER MATERIALS OF WHATEVER KIND OR SOURCE, WHICH MAY HAVE A BEARING ON FINANCIAL INDEPENDENCE.

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- C. EXCEPTIONS TO RESIDENCY REQUIREMENTS: SUBJECT TO ABOR POLICY 4-102, A STUDENT MAY ALSO BE CLASSIFIED AS AN IN-STATE RESIDENT FOR TUITION PURPOSES UPON ESTABLISHING BY OBJECTIVE EVIDENCE THAT:
1. THE STUDENT IS DOMICILED IN ARIZONA, AS SET FORTH IN THIS POLICY, FOR MORE THAN ONE YEAR, AND IS FINANCIALLY DEPENDENT UPON A PARENT WHO IS DOMICILED IN ARIZONA AS SET FORTH IN THIS POLICY.
 2. THE STUDENT IS DOMICILED IN ARIZONA, FOR LESS THAN ONE YEAR, AS SET FORTH IN THIS POLICY, AND:
 - a. THE DOMICILE OF THE STUDENT'S PARENT IS IN ARIZONA AS SET FORTH IN THIS POLICY; AND
 - b. THE PARENT OF THE STUDENT WHO IS DOMICILED IN ARIZONA IS ENTITLED TO CLAIM THE STUDENT AS AN EXEMPTION FOR FEDERAL AND STATE TAX PURPOSES (WHETHER OR NOT THE PARENT ACTUALLY CLAIMS THE STUDENT AS AN EXEMPTION).
 3. THE STUDENT IS DOMICILED IN ARIZONA AND:
 - a. THE STUDENT'S SPOUSE HAS ESTABLISHED DOMICILE IN ARIZONA FOR AT LEAST 12 MONTHS IMMEDIATELY PRECEDING THE LAST DAY OF REGISTRATION AND THE SPOUSE HAS DEMONSTRATED FINANCIAL INDEPENDENCE AS SET FORTH IN SECTIONS B.2 AND B.3, ABOVE; AND
 - b. THE STUDENT'S SPOUSE IS ENTITLED TO CLAIM THE STUDENT AS AN EXEMPTION FOR FEDERAL AND STATE TAX PURPOSES.
 4. THE STUDENT IS DOMICILED IN ARIZONA AND IS:
 - a. EMPLOYED BY AN EMPLOYER WHICH TRANSFERRED THE STUDENT TO ARIZONA FOR EMPLOYMENT PURPOSES; OR
 - b. THE SPOUSE OF AN EMPLOYEE EMPLOYED BY AN EMPLOYER WHICH TRANSFERRED THE STUDENT'S

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- SPOUSE TO ARIZONA FOR EMPLOYMENT PURPOSES;
OR
- c. AN EMPLOYEE OF AN ARIZONA EMPLOYER WHO IS TAKING NOT MORE THAN SIX CREDIT HOURS SOLELY THROUGH ELECTRONIC COURSE DELIVERY AT EMPLOYER-SANCTIONED SITES IN ARIZONA, WHEN THE EMPLOYER IS REQUIRED TO PAY ADDITIONAL SITE FEES OR TRANSMISSION COSTS;
 - d. FOR THE PURPOSES OF THIS SECTION D.3., “TRANSFER” MEANS AN EMPLOYEE WHO WAS TRANSFERRED BY THE EMPLOYEE’S EMPLOYER AT THE DIRECTION OF, AND FOR THE BENEFIT FOR THEIR EMPLOYER, FEWER THAN 12 MONTHS PRIOR TO THE TERM IN QUESTION, IS NOT SELF-EMPLOYED OR EMPLOYED IN A FAMILY-OWNED BUSINESS (OR SUBSIDIARY THEREOF) NOT PREVIOUSLY OPERATING IN ARIZONA.
5. THE STUDENT IS DOMICILED IN ARIZONA, IS AN EMPLOYEE OF A SCHOOL DISTRICT IN ARIZONA AND IS UNDER CONTRACT TO TEACH ON A FULL-TIME BASIS, OR IS EMPLOYED AS A FULL-TIME NONCERTIFIED CLASSROOM AIDE AT A PUBLIC SCHOOL WITHIN THAT SCHOOL DISTRICT. FOR PURPOSES OF THIS PARAGRAPH, THE STUDENT IS ELIGIBLE TO PAY IN-STATE TUITION ONLY FOR COURSES NECESSARY TO COMPLETE THE REQUIREMENTS FOR CERTIFICATION BY THE STATE BOARD OF EDUCATION TO TEACH IN A SCHOOL DISTRICT IN ARIZONA. NO MEMBER OF THE STUDENT’S FAMILY IS ELIGIBLE FOR CLASSIFICATION AS AN IN-STATE STUDENT PURSUANT TO THIS PARAGRAPH, ALTHOUGH THE STUDENT’S FAMILY MEMBER MAY OTHERWISE BE INDEPENDENTLY ELIGIBLE FOR CLASSIFICATION AS AN IN-STATE STUDENT PURSUANT TO OTHER SECTIONS OF THIS POLICY. FOR THESE STUDENTS, THE UNIVERSITIES:
- a. SHALL ESTABLISH UNIFORM PROCEDURES TO DETERMINE WHETHER COURSES TAKEN BY A TEACHER OR CLASSROOM AIDE QUALIFY UNDER THIS SECTION;

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- b. SHALL CONSIDER CHARTER SCHOOLS AS PUBLIC SCHOOLS CONSISTENT WITH ARIZONA STATUTES; AND
 - c. MAY APPLY THIS SECTION TO TEACHERS AND CLASSROOM AIDES FROM PRIVATE SCHOOLS WHERE THOSE PRIVATE SCHOOLS REQUIRE THAT TEACHERS HOLD ARIZONA TEACHER CERTIFICATION.
6. THE UNITED STATES STATIONED IN ARIZONA PURSUANT TO MILITARY ORDERS OR IS THE SPOUSE OR DEPENDENT CHILD OF A MEMBER OF THE ARMED FORCES OF THE UNITED STATES STATIONED IN ARIZONA PURSUANT TO MILITARY ORDERS AT THE TIME THE STUDENT IS ACCEPTED FOR ADMISSION. WHILE IN CONTINUOUS ATTENDANCE TOWARD THE DEGREE IN WHICH THE STUDENT ENROLLS, THE STUDENT DOES NOT LOSE IN-STATE CLASSIFICATION.
7. THE STUDENT IS A MEMBER OF THE ARMED FORCES OF THE UNITED STATES OR IS THE SPOUSE OR DEPENDENT CHILD OF A MEMBER OF THE ARMED FORCES OF THE UNITED STATES AND THE SERVICE MEMBER CLAIMED ARIZONA AS THE SERVICE MEMBER'S LEGAL RESIDENCE FOR AT LEAST TWELVE CONSECUTIVE MONTHS PRIOR TO THE LAST DAY OF REGISTRATION FOR THE TERM WHICH THE STUDENT IS SEEKING CLASSIFICATION AS AN IN-STATE RESIDENT FOR TUITION PURPOSES. THE STUDENT CLAIMING RESIDENCY STATUS UNDER THIS PROVISION IS REQUIRED TO:
- a. PROVIDE A COPY OF THE MILITARY FORM DD-2058 OF THE SERVICE MEMBER WHICH VERIFIES THE SERVICE MEMBER'S STATE OF LEGAL RESIDENCE; AND
 - b. IF APPLICABLE, PROVIDE EVIDENCE OF HAVING FILED AN ARIZONA RESIDENT INCOME TAX RETURN WITH THE ARIZONA DEPARTMENT OF REVENUE FOR THE PRIOR TAX YEAR ON ALL INCOME FROM ALL SOURCES.
8. THE STUDENT HOLDS AN HONORABLE DISCHARGE FROM THE UNIFORMED SERVICES OF THE UNITED STATES FROM EITHER ACTIVE DUTY OR RESERVE OR NATIONAL GUARD STATUS, OR HAS RETIRED FROM ACTIVE DUTY OR RESERVE

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OR NATIONAL GUARD STATUS AND HAS DEMONSTRATED OBJECTIVE EVIDENCE OF INTENT TO BE A RESIDENT OF ARIZONA. FOR THE PURPOSES OF THIS SUBSECTION, OBJECTIVE EVIDENCE OF INTENT INCLUDES AT LEAST ONE OF THE FOLLOWING:

- i. REGISTRATION TO VOTE IN ARIZONA.
- ii. AN ARIZONA DRIVER LICENSE.
- iii. ARIZONA MOTOR VEHICLE REGISTRATION.
- iv. EMPLOYMENT HISTORY IN ARIZONA.
- v. TRANSFER OF MAJOR BANKING SERVICES TO ARIZONA.
- vi. CHANGE OF PERMANENT ADDRESS ON ALL PERTINENT RECORDS.
- vii. OTHER MATERIALS OF WHATEVER KIND OR SOURCE RELEVANT TO DOMICILE OR RESIDENCY STATUS.

THE STUDENT SHALL BE GRANTED IMMEDIATE CLASSIFICATION AS AN IN-STATE STUDENT AND, WHILE CONTINUOUSLY ENROLLED, DOES NOT LOSE IN-STATE STUDENT CLASSIFICATION

9. THE STUDENT IS A VETERAN AS DEFINED IN TITLE 38 OF THE UNITED STATES CODE WHO, WHILE USING EDUCATION ASSISTANCE UNDER 38 UNITED STATES CODE CHAPTER 30 OR 33, ENROLLS IN A UNIVERSITY UNDER THE JURISDICTION OF THE ARIZONA BOARD OF REGENTS AFTER THE VETERAN'S DISCHARGE FROM ACTIVE DUTY SERVICE OF NINETY OR MORE DAYS OR WHO REMAINS CONTINUOUSLY ENROLLED FOLLOWING THE STUDENT'S DISCHARGE AND THE STUDENT HAS DEMONSTRATED OBJECTIVE EVIDENCE OF INTENT TO BE A RESIDENT OF ARIZONA. FOR THE PURPOSES OF THIS SUBSECTION, OBJECTIVE EVIDENCE OF INTENT INCLUDES AT LEAST ONE OF THE FOLLOWING:

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- i. REGISTRATION TO VOTE IN ARIZONA.
- ii. AN ARIZONA DRIVER LICENSE.
- iii. ARIZONA MOTOR VEHICLE REGISTRATION.
- iv. EMPLOYMENT HISTORY IN ARIZONA.
- v. TRANSFER OF MAJOR BANKING SERVICES TO ARIZONA.
- vi. CHANGE OF PERMANENT ADDRESS ON ALL PERTINENT RECORDS.
- vii. OTHER MATERIALS OF WHATEVER KIND OR SOURCE RELEVANT TO DOMICILE OR RESIDENCY STATUS.

THE STUDENT SHALL BE GRANTED IMMEDIATE CLASSIFICATION AS AN IN-STATE STUDENT AND, WHILE CONTINUOUSLY ENROLLED, DOES NOT LOSE IN-STATE STUDENT CLASSIFICATION

10. THE STUDENT, WHILE USING BENEFITS UNDER THE MARINE GUNNERY SERGEANT JOHN DAVID FRY SCHOLARSHIP PRESCRIBED IN 38 UNITED STATES CODE SECTION 3311(B)(9), ENROLLS IN A UNIVERSITY UNDER THE JURISDICTION OF THE ARIZONA BOARD OF REGENTS AND HAS DEMONSTRATED OBJECTIVE EVIDENCE OF INTENT TO BE A RESIDENT OF ARIZONA. FOR THE PURPOSES OF THIS SUBSECTION, OBJECTIVE EVIDENCE OF INTENT INCLUDES AT LEAST ONE OF THE FOLLOWING:
 - i. REGISTRATION TO VOTE IN ARIZONA.
 - ii. AN ARIZONA DRIVER LICENSE.
 - iii. ARIZONA MOTOR VEHICLE REGISTRATION.
 - iv. EMPLOYMENT HISTORY IN ARIZONA.
 - v. TRANSFER OF MAJOR BANKING SERVICES TO ARIZONA.

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- vi. CHANGE OF PERMANENT ADDRESS ON ALL PERTINENT RECORDS.
- vii. OTHER MATERIALS OF WHATEVER KIND OR SOURCE RELEVANT TO DOMICILE OR RESIDENCY STATUS.

THE STUDENT SHALL BE GRANTED IMMEDIATE CLASSIFICATION AS AN IN-STATE STUDENT AND, WHILE CONTINUOUSLY ENROLLED, DOES NOT LOSE IN-STATE STUDENT CLASSIFICATION

- 11. THE STUDENT, WHILE USING TRANSFERRED POST/911 G.I. BILL BENEFITS PURSUANT TO 38 UNITED STATES CODE SECTION 3319 DURING A TIME IN WHICH THE TRANSFEROR IS A MEMBER OF THE UNIFORMED SERVICES SERVING ON ACTIVE DUTY, ENROLLS IN A UNIVERSITY UNDER THE JURISDICTION OF THE ARIZONA BOARD OF REGENTS AND HAS DEMONSTRATED OBJECTIVE EVIDENCE OF INTENT TO BE A RESIDENT OF ARIZONA. FOR THE PURPOSES OF THIS SUBSECTION, OBJECTIVE EVIDENCE OF INTENT INCLUDES AT LEAST ONE OF THE FOLLOWING:

- i. REGISTRATION TO VOTE IN ARIZONA.
- ii. AN ARIZONA DRIVER LICENSE.
- iii. ARIZONA MOTOR VEHICLE REGISTRATION.
- iv. EMPLOYMENT HISTORY IN ARIZONA.
- v. TRANSFER OF MAJOR BANKING SERVICES TO ARIZONA.
- vi. CHANGE OF PERMANENT ADDRESS ON ALL PERTINENT RECORDS.
- vii. OTHER MATERIALS OF WHATEVER KIND OR SOURCE RELEVANT TO DOMICILE OR RESIDENCY STATUS.

THE STUDENT SHALL BE GRANTED IMMEDIATE CLASSIFICATION AS AN IN-STATE STUDENT AND, WHILE

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CONTINUOUSLY ENROLLED, DOES NOT LOSE IN-STATE STUDENT CLASSIFICATION

12. THE STUDENT DOES NOT MEET THE REQUIREMENTS SET FORTH IN SECTION D.9 OR D.10 AND, WHILE USING EDUCATIONAL ASSISTANCE UNDER 38 UNITED STATES CODE CHAPTER 30 OR 33, ENROLLS IN A UNIVERSITY UNDER THE JURISDICTION OF THE ARIZONA BOARD OF REGENTS AFTER THE VETERAN'S DISCHARGE FROM ACTIVE DUTY SERVICE OF NINETY OR MORE DAYS OR REMAINS CONTINUOUSLY ENROLLED FOLLOWING THE STUDENT'S DISCHARGE, AND THE STUDENT HAS DEMONSTRATED OBJECTIVE EVIDENCE OF INTENT TO BE A RESIDENT OF ARIZONA. FOR THE PURPOSES OF THIS SUBSECTION, OBJECTIVE EVIDENCE OF INTENT INCLUDES AT LEAST ONE OF THE FOLLOWING:

- i. REGISTRATION TO VOTE IN ARIZONA.
- ii. AN ARIZONA DRIVER LICENSE.
- iii. ARIZONA MOTOR VEHICLE REGISTRATION.
- iv. EMPLOYMENT HISTORY IN ARIZONA.
- v. TRANSFER OF MAJOR BANKING SERVICES TO ARIZONA.
- vi. CHANGE OF PERMANENT ADDRESS ON ALL PERTINENT RECORDS.
- vii. OTHER MATERIALS OF WHATEVER KIND OR SOURCE RELEVANT TO DOMICILE OR RESIDENCY STATUS.

THE STUDENT SHALL BE GRANTED IMMEDIATE CLASSIFICATION AS AN IN-STATE STUDENT AND, WHILE CONTINUOUSLY ENROLLED, DOES NOT LOSE IN-STATE STUDENT CLASSIFICATION.

13. THE STUDENT IS OTHERWISE DESCRIBED IN 38 UNITED STATES CODE SECTION 3679(C) AND HAS DEMONSTRATED OBJECTIVE EVIDENCE OF INTENT TO BE A RESIDENT OF ARIZONA. FOR THE PURPOSES OF THIS SUBSECTION,

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OBJECTIVE EVIDENCE OF INTENT INCLUDES AT LEAST ONE OF THE FOLLOWING:

- i. REGISTRATION TO VOTE IN ARIZONA.
 - ii. AN ARIZONA DRIVER LICENSE.
 - iii. ARIZONA MOTOR VEHICLE REGISTRATION.
 - iv. EMPLOYMENT HISTORY IN ARIZONA.
 - v. TRANSFER OF MAJOR BANKING SERVICES TO ARIZONA.
 - vi. CHANGE OF PERMANENT ADDRESS ON ALL PERTINENT RECORDS.
 - vii. OTHER MATERIALS OF WHATEVER KIND OR SOURCE RELEVANT TO DOMICILE OR RESIDENCY STATUS.
14. THE STUDENT IS AN ENROLLED MEMBER OF AN INDIAN TRIBE RECOGNIZED BY THE UNITED STATES DEPARTMENT OF INTERIOR WHOSE RESERVATION LAND LIES WHOLLY OR PARTIALLY IN ARIZONA AND EXTENDS INTO ANOTHER STATE AND IS A RESIDENT OF THE RESERVATION. FOR PURPOSES OF RESIDENCY CLASSIFICATION, ENROLLMENT AS A TRIBAL MEMBER IN A FEDERALLY RECOGNIZED TRIBE WHOSE RESERVATION LAND LIES WHOLLY OR PARTIALLY IN ARIZONA WILL BE SUFFICIENT TO ESTABLISH RESIDENCY FOR TUITION PURPOSES.
 15. THE STUDENT HAS PARTICIPATED IN THE AMERICORPS PROGRAM OR THE VOLUNTEERS IN SERVICE TO AMERICA PROGRAM FOR AT LEAST ONE YEAR IN ARIZONA.
 16. THE STUDENT IS DOMICILED WITHIN 75 MILES OF THE ARIZONA BORDER IN CLARK COUNTY, NEVADA OR IN WASHINGTON OR KANE COUNTIES, UTAH, OR IN SAN BERNARDINO, IMPERIAL, OR RIVERSIDE COUNTIES IN CALIFORNIA, INCLUDING THE CITIES OF NEEDLES, BLYTHE, EL CENTRO, BRAWLEY, AND WINTER HAVEN, AND IS ENROLLING IN A TOTAL OF NO MORE THAN 6 CREDIT HOURS PER SEMESTER OFFERED IN MOHAVE, LA PAZ, OR YUMA

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COUNTIES, ARIZONA BY A UNIVERSITY UNDER THE JURISDICTION OF THE ARIZONA BOARD OF REGENTS; OR THE STUDENT IS DOMICILED WITHIN 75 MILES OF THE ARIZONA BORDER IN GRANT, HIDALGO, OR LUNA COUNTIES IN NEW MEXICO AND IS ENROLLING IN A TOTAL OF NO MORE THAN 6 CREDIT HOURS PER SEMESTER OFFERED IN COCHISE COUNTY, ARIZONA BY A UNIVERSITY UNDER THE JURISDICTION OF THE ARIZONA BOARD OF REGENTS. THIS PROGRAM IS DESIGNED TO REDUCE EXCESS CAPACITY; THEREFORE, THE PRESIDENTS OF THE UNIVERSITIES SHALL ASSURE THAT CLASSIFYING THE STUDENT AS A RESIDENT IN THEIR RESPECTIVE PROGRAMS DOES NOT RESULT IN DENYING COURSE OFFERINGS TO ARIZONA RESIDENTS OR RESULT IN ADDITIONAL EXPENDITURES BEING REQUIRED FOR COURSE OFFERINGS.

17. THE STUDENT IS A DOCTORAL GRADUATE STUDENT WHO IS A CANDIDATE FOR A DEGREE, HAVING COMPLETED ALL REQUIREMENTS FOR THE DEGREE EXCEPT THE DISSERTATION, AND WHO QUALIFIED AS A RESIDENT STUDENT IMMEDIATELY PRIOR TO BEING ELIGIBLE TO BEGIN THE DISSERTATION.
 18. THE STUDENT IS A GRADUATE ASSISTANT OR GRADUATE ASSOCIATE AT A UNIVERSITY UNDER THE JURISDICTION OF THE ARIZONA BOARD OF REGENTS WHOSE ASSIGNED TEACHING OR RESEARCH RESPONSIBILITIES MEET THE GUIDELINES ESTABLISHED BY THE UNIVERSITY FOR DESIGNATION AS A RESIDENT STUDENT.
- D. SUBJECT TO ABOR POLICY 4-102, A STUDENT WHO DOES NOT HOLD A VISA THAT REQUIRES THE STUDENT TO MAINTAIN A FOREIGN DOMICILE OR THAT OTHERWISE PROHIBITS ESTABLISHING DOMICILE IN ARIZONA SHALL BE CLASSIFIED AS A RESIDENT IF THE STUDENT CAN ESTABLISH THAT, ON OR BEFORE THE LAST DAY OF REGISTRATION, THE STUDENT SATISFIED ONE OF THE FOLLOWING CRITERIA:
1. MEETS THE REQUIREMENTS FOR CLASSIFICATION AS A RESIDENT FOR TUITION PURPOSES AS SET FORTH ABOVE; OR
 2. QUALIFIES AS A RESIDENT REFUGEE STUDENT BY VIRTUE OF HAVING BEEN GRANTED REFUGEE STATUS IN

EXECUTIVE SUMMARY

ACCORDANCE WITH ALL APPLICABLE LAWS OF THE UNITED STATES AND HAVING ESTABLISHED DOMICILE IN ARIZONA AS SET FORTH IN SECTION B.2 ABOVE; PROVIDED THAT IN ESTABLISHING DOMICILE, THE STUDENT MUST NOT HOLD A VISA THAT PROHIBITS ESTABLISHING DOMICILE IN ARIZONA.

- E. SUBJECT TO ABOR POLICY 4-102 (NONRESIDENT TUITION), A FULL-TIME STUDENT ADMITTED AND ENROLLED AT A UNIVERSITY WHO OBTAINS RESIDENT STATUS BY VIRTUE OF ABOR POLICY 4-203 DOES NOT LOSE RESIDENT STATUS WHILE IN CONTINUOUS ATTENDANCE TOWARD THE DEGREE FOR WHICH CURRENTLY ENROLLED.

- F. THE DOMICILE OF AN UNEMANCIPATED PERSON IS THAT OF EITHER PARENT. SUBJECT TO ABOR POLICY 4-102 (NONRESIDENT TUITION), ANY UNEMANCIPATED PERSON WHO IS A STUDENT ADMITTED AND ENROLLED AT A UNIVERSITY AND WHO REMAINS IN THIS STATE WHEN THE PERSON'S PARENT, WHO HAD BEEN DOMICILED IN THIS STATE, REMOVES FROM THIS STATE DOES NOT LOSE RESIDENT STATUS WHILE IN CONTINUOUS ATTENDANCE TOWARD THE DEGREE FOR WHICH CURRENTLY ENROLLED.

- G. ALL STUDENTS HAVE TO PROVIDE EVIDENCE TO DEMONSTRATE IN-STATE RESIDENCY FOR TUITION PURPOSES. WHEN THE UNIVERSITIES CONSIDER EVIDENCE FOR RESIDENCY CLASSIFICATION, THEY BEGIN WITH FOUR PRESUMPTIONS:
 - 1. A NON-RESIDENT STUDENT'S PRESENCE IN ARIZONA IS PRIMARILY FOR THE PURPOSE OF EDUCATION AND NOT TO ESTABLISH DOMICILE;
 - 2. AN INDIVIDUAL CANNOT ESTABLISH RESIDENCY OR DOMICILE WHILE IN ARIZONA PRIMARILY FOR THE PURPOSES OF EDUCATION;
 - 3. AN INDIVIDUAL CANNOT ESTABLISH RESIDENCY FOR TUITION PURPOSES WHILE ATTENDING AN EDUCATIONAL INSTITUTION IN ARIZONA AS A FULL-TIME STUDENT;
 - 4. DECISIONS OF AN INDIVIDUAL AS TO THE ESTABLISHMENT OF RESIDENCY AND DOMICILE ARE GENERALLY MADE

EXECUTIVE SUMMARY

AFTER THE COMPLETION OF AN EDUCATION, AND NOT BEFORE.

- H. EVIDENCE BEING REVIEWED TO DETERMINE A STUDENT'S RESIDENCY STATUS, WHETHER BY A CLASSIFICATION OFFICER OR A HEARING REVIEW COMMITTEE, WHEN THE STUDENT REQUESTS REVIEW OF A RESIDENCY CLASSIFICATION, WILL BE EVALUATED AS DESCRIBED BELOW:
1. ALL INFORMATION PROVIDED BY THE STUDENT SHALL BE SUBJECT TO THE CLASSIFICATION OFFICER'S OR HEARING REVIEW COMMITTEE'S DECISION AS TO THE WEIGHT TO BE GIVEN TO IT, AND SUCH OFFICER OR COMMITTEE SHALL BE THE SOLE JUDGE OF THE AUTHENTICITY OR TRUTHFULNESS OF ANY MATERIAL OR STATEMENTS SUBMITTED AS SUPPORTIVE EVIDENCE. THE CLASSIFICATION OFFICER MAY REQUIRE ORIGINAL OR CERTIFIED COPIES OF DOCUMENTATION.
 2. IF THE STUDENT IS ABSENT FROM ARIZONA FOR MORE THAN 30 TOTAL DAYS DURING THE 12 MONTHS IMMEDIATELY PRECEDING THE LAST DAY OF REGISTRATION, THIS CREATES A REBUTTABLE PRESUMPTION THAT THE STUDENT IS NOT DOMICILED IN OR A RESIDENT OF ARIZONA. A STUDENT MAY REBUT THIS PRESUMPTION WITH OBJECTIVE EVIDENCE THAT THEY RETAINED THEIR ARIZONA DOMICILE AND RESIDENCE DESPITE THEIR ABSENCE(S).
 3. EVIDENCE OFFERED TO ESTABLISH ARIZONA RESIDENCY AND DOMICILE MUST REFLECT THAT THE STUDENT INTENDED TO ESTABLISH RESIDENCY AND DOMICILE IN ARIZONA THROUGHOUT THE REQUIRED 12-MONTH PERIOD OF CONTINUOUS PHYSICAL PRESENCE. ACTS OR EVENTS OCCURRING LESS THAN 12 MONTHS BEFORE THE LAST DAY OF REGISTRATION FOR THE TERM WHICH THE STUDENT IS SEEKING CLASSIFICATION AS AN IN-STATE RESIDENT FOR TUITION PURPOSES MAY BE CONSIDERED EVIDENCE THAT RESIDENCY OR DOMICILE HAS NOT BEEN ESTABLISHED.
 4. A STATEMENT OF INTENT BY THE STUDENT SHOULD BE WEIGHED IN LIGHT OF THE FACT THAT THE STUDENT KNOWS THAT THE STUDENT WILL REALIZE A SUBSTANTIAL

EXECUTIVE SUMMARY

REDUCTION IN TUITION BY BEING CLASSIFIED AS A RESIDENT FOR TUITION PURPOSES.

5. THE DOMICILE OF AN UNEMANCIPATED PERSON IS THAT OF THE PERSON'S PARENT.
6. IF A MINOR APPLIES FOR CLASSIFICATION AS A RESIDENT AND ALLEGES THAT THE MINOR IS EMANCIPATED, IN ADDITION TO THE REQUIREMENTS ABOVE, THAT MINOR MUST ALSO ESTABLISH VIA OBJECTIVE EVIDENCE THAT:
 - a. THE MINOR IS NOT LIVING WITH A PARENT; AND
 - b. THERE HAS BEEN A COMPLETE SEVERANCE OF THE PARENTAL RELATIONSHIP TO ALL LEGAL RIGHTS AND LIABILITIES, INCLUDING BUT NOT LIMITED TO CARE, CUSTODY, CONTROL, AND SERVICE.
7. ONCE ESTABLISHED, RESIDENCY FOR TUITION PURPOSES IS NOT LOST DUE ONLY TO THE STUDENT'S RECEIPT OF FUNDS FROM A SOURCE OUTSIDE ARIZONA.
8. THE CLASSIFICATION OF A MATRICULATED STUDENT IS TRANSFERABLE FROM ONE UNIVERSITY TO ANOTHER.
- I. ANY STUDENT FOUND TO HAVE MADE A FALSE OR MISLEADING STATEMENT CONCERNING DOMICILE OR TUITION STATUS SHALL BE SUBJECT TO DISMISSAL FROM THE UNIVERSITY AND BE HELD RESPONSIBLE FOR THE PAYMENT OF ANY TUITION AMOUNTS THAT WOULD HAVE BEEN CHARGED BUT FOR THE FALSE OR MISLEADING STATEMENT.

EXECUTIVE SUMMARY

4-205 Residency Classification Appeal REVIEW Procedures

If an individual believes he or she has met all of the residency requirements and has applied for reclassification and been denied, they A STUDENT may request an appeal A REVIEW OF A RESIDENCY CLASSIFICATION BY THE RESIDENCY OFFICER BY REQUESTING A REVIEW of the nonresident NON-RESIDENT classification.

- A. The university residency classification appeal REVIEW system shall consist of one or more committees. Each committee shall consist of at least three voting members appointed by the president of the university for a term of one fiscal year. Members may be reappointed by the president. The president shall determine the number of committees required to expeditiously conduct review hearings.
- B. The president shall designate a chair for each committee, who shall serve at the pleasure of the president. REVIEW HEARING. Members of each committee may include representatives from the faculty, administration, staff, professionals, and student body of the university. Residency classification officers shall not serve as members of a ANY REVIEW committee. The president may also appoint alternates who shall serve in place of a regular committee member at any REVIEW hearing at which such A regular member may be absent or disqualified.
- C. At least three committee members, including any alternates, must be present to conduct a REVIEW hearing and render a decision in an appeal of REGARDING THE STUDENT'S REQUEST TO REVIEW a residency classification determination.
- D. A request for appeal A REVIEW HEARING by an individual A STUDENT classified as a nonresident NON-RESIDENT shall be filed with the classification officer, OR OTHER INDIVIDUAL DESIGNATED BY THE UNIVERSITY TO RECEIVE REQUESTS, no later than 35 CALENDAR days from AFTER the last day of registration. FOR THE TERM FOR WHICH THE STUDENT IS SEEKING CLASSIFICATION AS AN IN-STATE RESIDENT. The request shall be in writing, signed by the individual STUDENT and shall include: (a) the individual's STUDENT'S current mailing address; (b) the reasons why the individual STUDENT is challenging the classification determination; and (c) a signed statement setting forth all facts in support of the individual's STUDENT'S claim that the classification determination is erroneous.

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- E. Failure to file a request for ~~appeal~~A REVIEW HEARING within the time prescribed shall constitute a waiver of the right to request ~~an appeal~~A REVIEW HEARING AND THE RESIDENCY CLASSIFICATION OFFICER'S DETERMINATION SHALL BE FINAL.
- F. The ~~appeal~~ REVIEW HEARING committee shall schedule a hearing within a reasonable time after receipt of ~~request for an appeal~~A REQUEST FOR REVIEW and shall provide the ~~individual~~STUDENT with written notice of the date, time, and place of the ~~meeting~~REVIEW HEARING at least seven days prior to the ~~meeting~~HEARING. Such notice may be made personally or by ~~certified mail and~~ email to the ~~current address listed by the student with the university~~UNIVERSITY EMAIL ADDRESS ASSIGNED TO THE STUDENT BY THE UNIVERSITY.
- G. The ~~individual~~STUDENT shall have the right to appear and may be represented by an advisor of ~~his or her~~THE STUDENT'S choice at the ~~individual's~~STUDENT'S expense. If the ~~individual~~STUDENT, without valid excuse or prior authorization, fails to appear, the committee may determine the matter on the basis of evidence before it. The ~~individual~~STUDENT or the ~~individual's~~STUDENT'S advisor, but not both, may examine and cross-examine witnesses and summarize the evidence in final argument to the committee.
- H. Every document filed with the university relating to residency classification of the ~~individual~~STUDENT shall constitute a part of the record. The committee shall also hear any relevant evidence, which the ~~individual~~STUDENT or the university wishes to present. THE UNIVERSITY MAY SET A DEADLINE BEFORE WHICH ALL EVIDENCE MUST BE SUBMITTED TO THE REVIEW COMMITTEE AND THE OTHER PARTY.
- I. Formal rules of evidence shall not apply. The committee shall receive and consider oral and documentary evidence of the kind on which responsible individuals are accustomed to rely in serious matters. The committee may exclude evidence that is cumulative or repetitious, and will determine the credibility or weight to be given to the evidence presented.
- J. The proceedings of the committee shall be recorded. Any copies of the record, or copies of a transcript if one is created, desired by the ~~individual~~STUDENT shall be at the ~~individual's~~STUDENT'S expense.
- K. The order of presentation shall be determined by the committee.
- L. The committee may make such rules for the conduct of hearings as are not inconsistent with these procedures.

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- M. The decision of the committee shall be final and not subject to further administrative review. The decision may be made by the committee at the time of the REVIEW hearing, or the committee may take the matter under advisement in which case the matter shall be decided within ten CALENDAR days, EXCLUDING SATURDAY, SUNDAY AND UNIVERSITY RECOGNIZED HOLIDAYS, following the REVIEW hearing.
- N. Written notice of the decision of the committee shall be promptly sent by ~~certified mail and email~~ to the ~~individual's current~~ EMAIL address ~~filed with the university~~ ASSIGNED TO THE STUDENT BY THE UNIVERSITY.
1. If the committee determines that the ~~individual~~ STUDENT should be classified as a resident, it shall direct the classification officer of the university to so classify the ~~individual~~ STUDENT. The university shall refund to the ~~individual~~ STUDENT the difference between the non-resident and resident tuition collected as a result of the ~~nonresident~~ NON-RESIDENT classification for the current semester. If the ~~individual files to appeal~~ STUDENT REQUESTS A REVIEW HEARING REGARDING the initial classification of residency (upon admission) within the first term of attendance and the ~~individual~~ STUDENT is successful, ~~in that appeal~~, any different DIFFERENCE between the in-state and out-of-state application fee paid by the ~~individual~~ STUDENT will also be refunded.
 2. If it is determined that the ~~individual~~ STUDENT is a ~~nonresident~~ NON-RESIDENT, the written notice shall advise the ~~individual~~ STUDENT that no further procedures within the university are available; the ~~individual~~ STUDENT may have the right to judicial review in the state courts; the time to pursue any legal action may be short; and, if the ~~individual~~ STUDENT wishes to pursue legal action, the ~~individual~~ STUDENT should seek legal counsel.

EXECUTIVE SUMMARY

4-206 Miscellaneous Provisions

REPEALED

- A. ~~The classification of a matriculated student is transferable from one university to another.~~

- B. ~~Any student found to have made a false or misleading statement concerning domicile or tuition status shall be subject to dismissal from the university and be held responsible for the payment of any tuition amounts that would have been charged but for the false or misleading statement.~~

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EXECUTIVE SUMMARY

Item Name: Report on the Research and Health Sciences Committee Meeting

Action Item

Requested Action: The board office asks the board to review the report of the March 26, 2021 Research and Health Sciences Committee.

Agenda Highlights
Research and Health Sciences Committee
March 26, 2021

1. Overview of Technology and Research Initiative Fund (TRIF)

The board office and the universities will provide an overview regarding the Technology and Research Initiative Fund (TRIF).

Outcomes and Assignments:

The committee received an overview of Technology and Research Initiative Fund (TRIF) program, its history and requirements.

Regents encourage further discussions on ways to communicate to the legislature and the public about how this enterprise funding benefits Arizonans through the economy, workforce, attainment, health and many other ways.

2. TRIF Investment Initiatives Areas and Outline of TRIF 5 Year Plan Requirements (FY 2022-2026)

The committee received an overview of the current TRIF investment areas and engage in a discussion regarding the development of the TRIF 5 Year Plans outline for upcoming fiscal years 2022 – 2026.

Outcomes and Assignments:

The committee received an overview of the current TRIF investment areas and engaged in a discussion regarding the development of the proposed TRIF 5 Year Plans outline for upcoming fiscal years 2022 – 2026.

Regents expressed interest in continued discussions about how the framework around how TRIF dollars are currently spent, and to explore parameters around the possible use of TRIF dollars in other areas.

Contact Information:

Chad Sampson, ABOR

chad.sampson@azregents.edu

602-229-2512

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3. University TRIF Presentations

The committee received TRIF presentations and engaged in discussions with the universities' Vice Presidents of Research regarding the process by which the university determines TRIF expenditure priorities, why each university chooses to expend TRIF funding in the areas it chooses, what are the grand challenges the university is trying to solve, and why this relevant to average Arizonans.

Outcomes and Assignments:

Regents support university collaboration, and outside partnerships as a few ways to continue to provide benefits for Arizona citizens through the work from TRIF dollars.

4. Proposed Distribution of TRIF Revenue on COVID-19 Detection, Monitoring, and Impact Projects

The committee is asked to engage in a discussion and recommend the board approve the distribution of \$3,000,000 in TRIF revenues for the universities' collaborative COVID-19 activities and projects.

Outcomes and Assignments:

The committee approved forwarding to the board for approval the distribution of \$3,000,000 in TRIF revenues for the universities' collaborative COVID-19 activities and projects.

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Item Name: **Proposed Distribution of TRIF Revenue on COVID-19
Detection, Monitoring and Impact Projects**

 Action Item

Requested Action: The board office asks the board to approve the distribution of \$3,000,000 in TRIF revenues for the universities' collaborative COVID-19 activities and projects.

Background and Discussion

The Research and Health Sciences committee received an update from university principle investigators regarding the universities' collaborative efforts pertaining to COVID-19 detection, monitoring and impact.

At the conclusion of the discussion, the committee was asked to recommend the board approve the distribution of \$3,000,000 in available TRIF funding to support continued university collaboration around COVID-19 activities and projects as detailed in the attached tri-university proposal.

Committee Review and Recommendation

The Research and Health Sciences Committee reviewed this item at its March 26, 2021 meeting, and recommended forwarding the item to the full board for approval.

Statutory/Policy Requirements

A.R.S. §15-1648 "Technology and Research Initiative Fund"

ABOR Policy 3-412 "Administration of Technology and Research Initiative Fund"

EXECUTIVE SUMMARY

Arizona Universities Collaborate on CoV-2 Variant Detection, Monitoring, and Impact.

There is a great need for monitoring and assessing SARS-CoV-2 Variants of Concern.

Executive Summary. The COVID-19 pandemic has profoundly impacted the wellbeing of our state and just as the vaccines to end it have arrived, we face a new challenge: SARS CoV-2 variants that transmit at higher rates, have higher mortality rates, and evade immunity. The Arizona Covid Genomics Union is a collaboration among the state's three universities that has been tracking variants since early in 2020 and can rapidly respond to this challenge. NAU, ASU, and UA are proposing to study the immunology of Variants of Concern (VoC) and their role in evading the immune system, vaccination and spread among Arizonans. All three of the universities will collectively form the Arizona Collaborative Covid Consortium (AC³), jointly engaging in surveillance and immunity analysis. We will thus leverage our shared expertise/resources and data to understand the biology of the variants of concerns and provide mitigating strategies to health care professionals and public health officials.

The Challenge. As soon as the novel coronavirus emerged in Wuhan, China in December 2019, it began to mutate and evolve to become a more efficient human pathogen. Higher transmissibility was one of the first changes recognized (Spring 2020) and this continues to be a malleable viral trait of concern. However, with increasing immunity from COVID-19 cases and vaccination, and massive worldwide viral load, the virus is evolving to evade our immune responses, and this is very concerning. Immunity is our pathway to end the pandemic. It is critically important to Arizona to have real-time monitoring of VoC in Arizona to assess the pandemic risk and formulate responses.

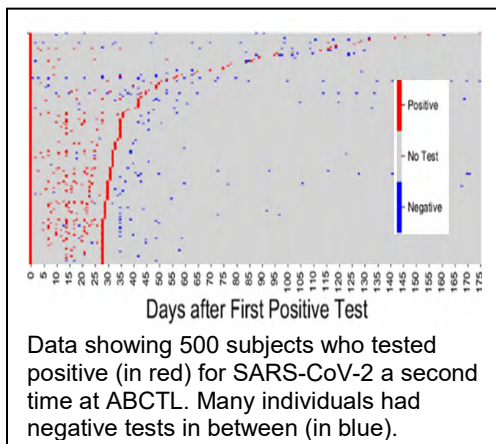
An AZ Cooperative Response. Early in the pandemic (Feb 2020) Arizona's universities recognized the importance of tracking the virus by using whole genome sequencing and we formed a coalition to generate data, analyze the patterns, and inform AZ State health officials. The Arizona Covid Genomics Union (ACGU) is an open collaboration of universities (UA, ASU, and NAU), a nonprofit NGO (TGen), and governmental public health institutions (County and State), with established rules for data sharing and cooperation. The ACGU members have generated over 5,000 COVID-19 genome sequences since the beginning of the pandemic, with two joint publications and several more from individual members. ACGU meets regularly, shares data, and continually communicates to coordinate analyses and VoC impacts. We have engaged in public discourse to keep Arizonans educated about the continuing risk. The ACGU is a proven approach for our universities' regional-centric coordinated response to a global problem.

Problem Statement. While the development of multiple effective vaccines is a major advancement in the fight against COVID-19, several Variants of Concern have emerged in communities. For example, the UK variant (B.1.1.7), South Africa variant (B.1.351) and the Brazil variant (P.1). These are of concern because of mutations in their viral genomes that affect

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antibody responses and binding to the host cell receptor and because they may not be detected by many currently available diagnostic tests. There has been broad reporting of post-acute long-term sequelae of viral infection that involve multiple organs and systems (so-called 'long COVID'). It is not known if some viral variants may be more likely to contribute to these long-term consequences of disease. Therefore, there is a critical need to track SARS-CoV-2 variants in real-time and understand the immunological ramifications of infection by these variants in order to inform public health strategies, diagnostics and vaccine development.

The Need. Unfortunately, much of the intense monitoring was accomplished in the first half of 2020 with The Arizona COVID-19 Genomics Union's efforts lagging in the late summer and fall of 2020 as local institutional accounts were depleted and public health interests veered to other problems. Sadly, when the UK Variant of Concern (UK-VoC) was identified in early December, there had been no Arizona CoV-2 genomes sequenced since August. In short, Arizona was not monitoring CoV-2 variants and we never would have seen UK-VoC if not for the warnings from Public Health England. The exact danger and challenges of each variant is still largely unknown. As variants are identified, we need to understand: how they transmit through populations, how they will alter COVID-19 disease, how they evade immunity, and how therapeutics will be affected. A3Cs will engage in surveillance and immunity analysis, and will strive to understand the biology of the variants. The information obtained during this program will have long lasting implications in setting public health strategies towards mitigating any harmful effects of COVID-19 VoC and other future pandemics.



Arizona State University and the Biodesign Institute
PIs: Drs. Efrem Lim, Joshua LaBaer, Vel Murugan, Ji Qiu

ASU is committed to a comprehensive COVID-19 management plan and public health response. One of the University's COVID-19 response efforts is to actively track the virus using cutting-edge Next-Generation Sequencing technology. This includes genome sequencing of the first SARS-CoV-2 cases in March 2020. Most recently, we confirmed the first B.1.1.7

cases in Arizona. ASU has sequence confirmed 13 cases of B.1.1.7 in Arizona to date, highlighting the need for more vigilance. ASU has been working closely with the other leading institutions in Arizona, including NAU and UofA, as part of the Arizona COVID-19 Genomics Union (ACGU), to enable open data-sharing and joint analyses.

ASU has also developed multiple capabilities to analyze the immunology of infection by the various viral strains and the effects on longer lasting disease conditions. These patients, given the name "[long haulers](#)", have in theory recovered from the worst impacts of COVID-19 and

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have tested negative. This condition can affect anyone – old and young, otherwise healthy people and those battling other conditions. It has been seen in those who were hospitalized with COVID-19 and patients with very mild symptoms. The ASU capability includes rapid serological tests that examine responses not only to different versions of proteins in different viral variants, but also to other concurrent or historical infections.

Sustained Sequencing and Immunological Surveillance of SARS-CoV-2 in Arizona.

We will perform both next-generation sequencing of SARS-CoV-2 genomes and measurements of antibody profiles from positives samples tested at the ASU Biodesign Institute's CLIA-certified testing laboratory (ABCTL). Samples tested at the ABCTL come from across Arizona, including public testing sites for Arizona Department of Health Services, non-public providers and on-site collections. About 40% of participants have given their consent to be contacted and willingness to participate in research. Hence, we are uniquely poised to conduct a sustained state-wide immune surveillance, more specifically of COVID-19 long haulers. Each sample is linked to patient metadata through a HIPAA-compliant portal (Point and Click). For this work, all samples are de-identified, and data are managed responsibly in accordance with IRB/HIPAA protocols that have been fully approved. Therefore, our data has significant epidemiological value.

Variants that break through immunity and cause COVID-19 long haulers' symptoms are of particular concern. We propose to prioritize our resources to sequence samples with the highest chance of yielding clinically impactful variants.

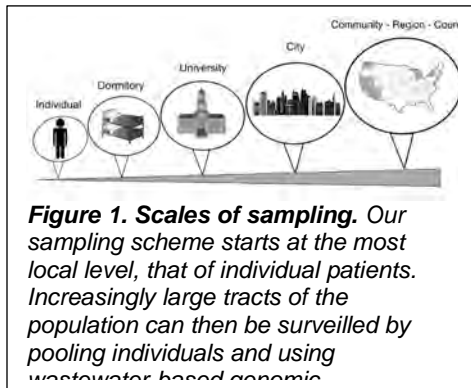
Note that ASU has additional sources of funds to perform SARS-CoV-2 sequencing. That activity is described here to demonstrate the integration of the activities. The bulk of the ABOR TRIF funds will be used to expand the study to include the immunology of the variants.

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**Tracking SARS-CoV-2 variants of concern (VoC) and their impacts
The University of Arizona**

PI: Dr. Michael Worobey, University of Arizona

The current SARS-CoV-2/COVID-19 pandemic is a challenge of the sort the country has not faced since the influenza pandemic of 1918, which killed 675,000 people in the United States in 1918-19. Newly emerging variants of SARS-CoV-2 exhibit increased transmission ability as well as mutations that may provide some degree of escape from immune responses from prior natural infection and current vaccine formulations. These variants of concern, such as ‘B.1.1.7’ in the UK and ‘B.1.351’ in South Africa, have swept to dominance in each country over a stunningly short period of just a few months. Our ‘genomic epidemiology’ approach has already yielded key insights including dating the emergence of B.1.1.7 in the US and accurately predicting its rapid spread here. We have also published two papers in *Science* documenting



the origins of pandemic in the US and Europe and, ultimately, in Wuhan, China. In this project we seek to build on these efforts as follows:

1. Genomic sequencing of all SARS-CoV-positive samples. We have developed a novel ‘saline gargle’ clinical PCR test for the virus that is being used for thousands of tests per week. We will sequence SARS-CoV-2 genomes from all positive samples to detect known or newly-identified VoC. All resulting genomes will be analyzed co-operatively within the multi-

institution Arizona COVID-19 Genomics Union (ACGU). This work will be led by Dr. Michael Worobey and Dr. Ryan Sprissler.

2. Isolation and characterization of variants of concern. We will culture virus from variants of concern in our BSL-3 facilities and investigate their immune escape properties. We have found that it is crucial to use authentic viral isolates for assays that test how well a person’s immune response to prior infection or vaccination protects against variants. We have already isolated a ‘home grown’ variant at UArizona that contains a mutation at the same key amino acid as B.1.351 and P.1 (first identified in Brazil). And it does provide considerable evasion of immunity. The work will be led by Dr. Janko Nikolich, Dr. Deepta Bhattacharya, and Dr. Michael Worobey.

3. Monitoring variants of concern using wastewater. We have developed some of the world’s most sophisticated and successful approaches to monitoring wastewater for SARS-CoV-2, from single dormitories to complete municipal ‘sewersheds’ in Tucson, Yuma, and other sites in AZ. This system (Figure 1) will provide a powerful means to identify and track the dynamics of

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variants of concern, particularly once widespread vaccination provides potent selection for immune escape variants. This work will be led by Dr. Ian Pepper and Dr. Michael Worobey.

4. 'Long COVID'. Persistent disease hits a large fraction of COVID-19 patients and is a public health time-bomb. We will draw on our extensive clinical network to compare the incidence and nature of long COVID in patients infected by variants versus 'wildtype' SARS-CoV-2. This work will be led by Dr. Janko Nikolich.

Northern Arizona University and the Pathogen and Microbiome Institute

Principal Investigator: Dr. Paul Keim, Executive Director

1. In order to understand the global and national context for Arizona variants, we will monitor SARS-CoV-2 variants in public databases. To identify emerging variants of concern we will download and analyze all new SARS-CoV-2 genomes that are uploaded each week to GISAID, along with all new Arizona genomes being generated by the ACGU. GISAID is a resource for sharing SARS-CoV-2 genome sequences from around the world, and our participation in the ACGU provides us with access to genomes from AZ patients as soon as these are generated. The different variants that we identify around the globe will then be specifically targeted for surveillance here in Arizona. We will work with clinical specimen sequencing teams at TGen North, ASU, UA, and the AZ Department of Health Services to integrate new Arizona Covid genomes into these analyses. This work will be led by co-PIs: Drs. Jason Ladner, Jason Sahl, Crystal Hepp, and Greg Caporaso.

2. PMI will continue to partner with TGen North to increase our capacity to sequence SARS-CoV-2 genomes from clinical specimens. NAU and PMI have excess genome sequence capacity in the form of our sequencing instruments and personnel. TGen has established multiple relationships with clinical partners, AZ Dept. of Health Services, and local governments to analyze virus genomes. TGen North has been the largest contributor to the Arizona State genome databases, thus far. The proposed partnership between PMI is capable of increasing TGen North's productivity to greater than 1,000 genomes per week; greatly expanding our capacity to detect and monitor variants of concern. PI – Dr. Paul Keim

3. We propose to extensively sample wastewater for SARS-CoV-2 virus and generate genomic sequences to identify and monitor Variants of Concern. PMI has been actively sampling wastewater in order to understand COVID-19 incidence rates in different cities and even different housing complexes. This allows us to identify Variants of Concern across a broad geographic area and across time. We will: 1) continue our sampling of Northern Arizona but also expand to test wastewater across the State of Arizona, 2) use tiled amplicons to generate whole genome sequences from the wastewater samples. This unbiased approach will be used selectively with the goal of identifying novel variants, 3) develop targeted amplicon sequencing

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assays to detect known Variants of Concern. This work will be led by co-PIs: Drs. Crystal Hepp and Jason Sahl.

4. A SARS-CoV-2 BioBank will be established for Variants of Concern to facilitate subsequent experiments with anti-COVID drugs, diagnostics, and animal models. This an opportunity to develop a biobank of CoV-2 variants for future scientific research. We will work with TGen North and the AZ Department of Health Services to identify clinical specimens with unique variant types. These will be transferred to PMI and the virus variants grown in our ABOR supported high containment laboratory and then stored for future work, including use in animal models to understand changes in transmission and virulence. Basic characterization of the VOCs will be performed to understand the baseline biological properties of each. This work will be led by co-PIs Drs. C. Todd French and Bridget Barker.

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Item Name: Report on the Audit Committee Meeting

Action Item

Requested Action: The board office asks the full board to review the report of the April 1, 2021 Audit Committee meeting.

**Agenda Highlights
Audit Committee Meeting
April 1, 2021**

1. Approval of Minutes

Outcomes and Assignments:

- Minutes from the May 28, 2020 and September 10, 2020 executive sessions and the November 5, 2020 public session were approved.

2. Discussion Regarding Auditor General Audits

Outcomes and Assignments:

- The committee reviewed written correspondence from the Arizona Office of the Auditor General.

3. Internal Audit Review Boards Reports

Outcomes and Assignments:

- The committee reviewed the written reports from the universities' IARB chairs.

4-6. Chief Audit Executives Reports

Outcomes and Assignments:

- The committee reviewed the written reports from the universities' CAEs.
- The universities' CAEs commented on their written activity reports.

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EXECUTIVE SUMMARY

Executive Session

Pursuant to A.R.S. § 38-431.03 (A.1) and (A.2), the committee convened in executive session to:

- Review the executive session minutes of the November 5, 2020 meeting;
- Conduct reviews of assignments with the universities' chief audit executives.

Outcomes and Assignments:

- Both items were discussed during Executive Session.