THE PENNSYLVANIA STATE UNIVERSITY

The University Faculty Senate

AGENDA

Tuesday, September 13, 2022
1:30 p.m.
112 Kern Building

Via ZOOM at 1:30 p.m
ZOOM LINK https://psu.zoom.us/j/97759044937

Or iPhone one-tap (US Toll): +16468769923,97759044937# or +13017158592,97759044937#

Or Telephone:
Dial:
+1 646 876 9923 (US Toll)
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+1 669 900 6833 (US Toll)
+1 253 215 8782 (US Toll)
+1 346 248 7799 (US Toll)
Meeting ID: 977 5904 4937

International numbers available: https://psu.zoom.us/u/acf4Yq6mPh

We will use the Faculty Senate Microsoft PowerApps “portal” to collect attendance and to vote on the legislative/advisory consultative reports during the meeting. Senators who have voting rights should have their full PSU email address (ex. abc123@psu.edu) as well as your two-step authentication app (Duo) ready and follow the instructions found here: https://sites.psu.edu/facultysenate/senators/voting-attendance-instructions/


Senators are reminded to bring their laptop or smartphone for the purpose of logging into PowerApps to vote.
A. MINUTES OF THE PRECEDING MEETING

Minutes of the April 26, 2022 Meeting in The Senate Record

B. COMMUNICATIONS TO THE SENATE

Senate Curriculum Report of August 30, 2022  Appendix A

C. REPORT OF SENATE COUNCIL - Meetings of June 7, 2022; June 21, 2022; and August 30, 2022

D. ANNOUNCEMENTS BY THE CHAIR

E. COMMENTS BY THE PRESIDENT OF THE UNIVERSITY

Budget Update  Appendix S

F. COMMENTS BY THE EXECUTIVE VICE PRESIDENT AND PROVOST OF THE UNIVERSITY

G. FORENSIC BUSINESS

H. UNFINISHED BUSINESS

Senate Committee on Committees and Rules

Revisions to Bylaws, Article III, Election to Senate  Appendix B
(presented at 4/26 Plenary Meeting; vote will take place at 9/13 Plenary Meeting)

Revision to Standing Rules, Article II, Section 6(a)
Establishing Subcommittees  Appendix C
(presented at 4/26 Plenary Meeting; vote will take place at 9/13 Plenary Meeting upon approval of the Bylaws revision above)

Revisions to Standing Rules, Article I, Section 12(e)
Tellers  Appendix D
(presented at 4/26 Plenary Meeting; vote will take place at 9/13 Plenary Meeting upon approval of the Bylaws revision above)

I. LEGISLATIVE REPORTS

Senate Committees on Committees and Rules and Admissions, Records, Scheduling and Student Aid

Revisions to Standing Rules, Article II – Senate Committee Structure Section 6(b) - Committee on Admissions, Records, Scheduling and Student Aid (DEI Addition)  Appendix E

Senate Committees on Committees and Rules and Educational Equity and Campus Environment

Revision to Standing Rules, Article II – Senate Committee Structure
Section 6(e) - Committee on Educational Equity and Campus Environment (DEI Addition)  Appendix F

Senate Committees on Committees and Rules and Outreach

Revision to Standing Rules, Article II – Senate Committee Structure  Appendix G
Section 6(i) – Committee on Outreach (DEI Addition)

Senate Committee on Curricular Affairs

Legislative Updates to FYE/FYS, Policies 150-60, 150-65, 150-68, 171-40  Appendix H

Update General Education Policies 142-00, 143-10, 143-20, 160-20, 190-10, 192-00, 192-10, 192-20, 193-30

REPORT POSTPONED UNTIL OCTOBER 18, 2022 SENATE MEETING  Appendix I

Senate Committee on Intercollegiate Athletics

Policy 67-10 Division I - Athletic Competition (University Park)  Appendix J

J. ADVISORY/CONSULTATIVE REPORTS

Senate Committees on Faculty Affairs and Intra-University Relations

Revisions to AC-22: Search Procedures for Academic Administrative Positions (Formerly HR-22)  Appendix K

K. POSITIONAL REPORTS

None

L. INFORMATIONAL REPORTS

Senate Council

*Report on Fall 2021 Academic Unit Visits  Appendix L

*Report on Spring 2022 Academic Unit Visits  Appendix M

*2021-22 Annual Ombudsperson Report  Appendix N

Senate Committee on Curricular Affairs

US/IL Curricular Requirements
[15 minutes allotted for presentation and discussion]

*Integrated Undergraduate-Graduate Programs  Appendix P

Senate Committee on Faculty Benefits and Joint Committee on
Insurance and Benefits

*2021-2022 Annual Report on the Status of Benefits Changes Appendix Q

Senate Committee on Libraries, Information Systems, and Technology

Library Renegotiations with Elsevier
[10 minutes allotted for presentation and discussion] Appendix R

*Web-only reports.

M. NEW LEGISLATIVE BUSINESS

None

N. COMMENTS AND RECOMMENDATIONS FOR THE GOOD OF THE UNIVERSITY

The next regularly scheduled meeting of the University Faculty Senate will be held on Tuesday, October 18, 2022, at 1:30 p.m.
COMMUNICATION TO THE SENATE

DATE: August 31, 2022
TO: Michele Stine, Chair and Chair-Elect, University Faculty Senate
FROM: Mary Beth Williams, Chair, Senate Committee on Curricular Affairs

The Senate Curriculum Report dated August 30, 2022 has been circulated throughout the University. Objections to any of the items in the report must be submitted to Kadi Corter, Curriculum Coordinator, 101 Kern Graduate Building, 814-863-0996, kkw2@psu.edu, on or before September 30, 2022.

The Senate Curriculum Report is available on the web and may be found at: http://senate.psu.edu/curriculum/senate-curriculum-reports/
SENATE COMMITTEE ON COMMITTEES AND RULES

Revisions to Senate Bylaws, Article III, Election to the Senate

(Legislative)

Implementation: Upon approval by the Senate

Introduction and Rationale

In the spring of 2021, the chair of Committees on Committees and Rules (CC&R), Victor Brunsden, formed a subcommittee on Elections of that body to provide recommendations related to all elections and nominations where election processes are managed by the University Faculty Senate. The impetus for the formation of this subcommittee was confusion, complaints, and concerns that have been brought to CC&R and the Senate Officers over the past several years.

The Elections Subcommittee gathered these concerns and reviewed the Senate’s governance documents, procedures, and forms for all references to elections and nominations processes. As a result of this analysis, this is the first in a series of the subcommittee’s recommendations, focused in on the role and purview of the Senate’s Elections Commission.

One of the issues uncovered by the Elections Subcommittee had to do with the role of the Senate’s Election Commission and its duties, which is not clearly stated in our governance documents. To that end, this legislation recommends reordering the sections within our Bylaws, Article III (Election to the Senate) to be in a more logical order that better introduces the Elections Commission and explains its duties. Furthermore, to provide improved consistency, transparency, and clarity to all elections of senate-related positions and committees, we recommend that all elections overseen by the University Faculty Senate be supervised by the Elections Commission.

Recommendation

This report recommends several changes to Bylaws, Article III (Elections to the Senate):

1. Rename Bylaws Article III “Election to the Senate” to “Elections” to reflect that this article will also address extra-Senatorial elections.
2. Add a new Section 1(d) to Bylaws Article III (Election to the Senate) that introduces the Elections Commission, its role, and its duties.
3. Delete the existing Bylaws Article III (Election to the Senate) Section 9  
   [Note: Subsequent legislation will recommend placing the membership composition in Standing Rules Article II, Section 6(a).]
Bylaws, Article III – Election. [END DELETE] 

Section 1

Election to the Senate by members of the University faculty in each voting unit shall be as follows:

a) Nominations shall be made by members of the University faculty. The procedures shall provide that every member of the electorate shall have the opportunity to place names in nomination.

(b) While it is recommended that there be at least twice as many nominations as there are senators to be elected, there must be no fewer than one-and-one-half times the number of senators to be elected.

(c) Election shall be by secret ballot.

[END ADD] (d) All elections of the Senate including extra-senatorial elections shall be supervised by an Elections Commission. The duties of the Elections Commission will be to ensure that the Senate’s annual census occurs on a timely basis, help identify problematic issues that may arise during that census, recommend solutions to such issues, and ultimately ensure the legitimacy and accuracy of the Senate elections processes. [END ADD]

Section 2

The Elections Commission shall review annually and adjust, if necessary, the number of senators to be elected from each voting unit, based on the distribution of the University faculty as of the preceding November 1.

Section 3

Two retired faculty senators will be elected according to the following procedures. The Senate office will obtain from the Office of Human Resources a list of retired faculty members. That list will be cross-checked with lists of faculty who served on the University Faculty Senate prior to retirement. From the list of former senators, the Committee on Committees and Rules will develop a list of potential nominees, and the Executive Director will then contact the individuals to ask if they would stand for election to the Senate. A ballot will be established with the individual former senators (the order of names on the ballot will be determined by random selection) who have consented to serve. This ballot will also have a line marked “Other” for write-in votes so that other members of the retired population can be included in the voting. The ballot will be made available to all retired faculty. A simple plurality vote will determine the winner. In the case of a tie, the Committee on Committees and Rules will determine the winner by a coin toss. One Retired Senator will serve on the Committee on Faculty Benefits and one will
serve on a standing Senate committee of the retired faculty senator’s choosing. The term of office will be four (4) years. If a retired senator cannot fulfill his/her term, the alternate from the last election will be appointed to do so. The elected retired faculty will be full voting members of the Senate.

Section 4

Student senators shall be nominated and elected according to such procedures as the Elections Commission of the Senate may establish.

If a student senator is unable to attend a meeting of the University Faculty Senate, an alternate may substitute for the senator at the plenary meeting of the Faculty Senate. The alternate may also substitute for the senator at the senator’s committee meeting being held on the same day. The Senate office must be provided with the name of the alternate senator prior to the first full meeting of the Senate year. The alternate senator must notify the Senate office prior to attending the meeting in order to receive the same voting privileges as the senator for whom he/she is substituting for the day.

Section 5

The names of newly elected and newly appointed senators to serve during the following year shall be reported to the Senate office by the first Friday in February in order to be reported to the Senate at the last regular meeting of the academic year.

Section 6

An elected senator who is engaged in any type of professional activity making it impossible to carry out Senate responsibilities for a period exceeding three consecutive months, excluding June, July and August, may resign if he or she wishes, but otherwise shall be replaced by an alternate to fill the period of time that the senator will be absent from the Senate.

Section 7

In case an elected faculty senator is unable to fulfill the duties of their elected term, the University faculty of the senator’s voting unit shall identify a replacement in the following manner: In addition to identifying an elected senator for each vacant seat, regular Senate elections shall identify at least the highest ranking alternate, that is, the candidate receiving the highest number of votes of those not elected. If more than one alternate is identified, the alternates’ names should be submitted in order of rank, based on the number of votes. The names of the winner(s) and all of the alternate(s) shall be reported directly to the Senate office. First choice for replacement is to be the highest ranking alternate, as identified in the most recent regular Senate election; if the highest ranking alternate is not available, then the choice will move to all remaining alternates, in order of their rank by vote. If no alternates are available from the most recent regular Senate election, then the University faculty of the voting unit shall hold a special election to identify a new elected senator, who will complete the unfinished term. This same procedure shall be followed in the replacement of committee members elected at-large by the Senate.
Section 8

Duties of Senators:

a) Attend the Senate plenary meetings.

b) Attend the assigned standing committee meetings.

c) Communicate with their unit faculty governance organization pertaining to the activities of the Senate.

d) Elected faculty senators are required to maintain a two-thirds attendance rate for both the plenary meetings and the assigned standing committee meetings. Should a senator drop below this level in either meeting category in each of two consecutive years, the senator may resign if he or she wishes, otherwise the Senate will remove the senator and require the unit to replace that senator with an alternative elected representative.

This provision does not pertain to sabbatical, medical, or other official leaves of absence, or absence related to professional responsibilities.

Section 9

All elections of the Senate shall be supervised by an Elections Commission consisting of the Secretary of the Senate and four other elected faculty senators selected by the Committee on Committees and Rules.

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Election to the Senate by members of the University faculty in each voting unit shall be as follows:

a) Nominations shall be made by members of the University faculty. The procedures shall provide that every member of the electorate shall have the opportunity to place names in nomination.
(b) While it is recommended that there be at least twice as many nominations as there are senators to be elected, there must be no fewer than one-and-one-half times the number of senators to be elected.

(c) Election shall be by secret ballot.

(d) All elections of the Senate including extra-senatorial elections shall be supervised by an Elections Commission. The duties of the Elections Commission will be to ensure that the Senate’s annual census occurs on a timely basis, help identify problematic issues that may arise during that census, recommend solutions to such issues, and ultimately ensure the legitimacy and accuracy of the Senate elections processes.

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Student senators shall be nominated and elected according to such procedures as the Elections Commission of the Senate may establish.

If a student senator is unable to attend a meeting of the University Faculty Senate, an alternate may substitute for the senator at the plenary meeting of the Faculty Senate. The alternate may also substitute for the senator at the senator’s committee meeting being held on the same day. The Senate office must be provided with the name of the alternate senator prior to the first full
meeting of the Senate year. The alternate senator must notify the Senate office prior to attending the meeting in order to receive the same voting privileges as the senator for whom he/she is substituting for the day.

Section 5

The names of newly elected and newly appointed senators to serve during the following year shall be reported to the Senate office by the first Friday in February in order to be reported to the Senate at the last regular meeting of the academic year.

Section 6

An elected senator who is engaged in any type of professional activity making it impossible to carry out Senate responsibilities for a period exceeding three consecutive months, excluding June, July and August, may resign if he or she wishes, but otherwise shall be replaced by an alternate to fill the period of time that the senator will be absent from the Senate.

Section 7

In case an elected faculty senator is unable to fulfill the duties of their elected term, the University faculty of the senator’s voting unit shall identify a replacement in the following manner: In addition to identifying an elected senator for each vacant seat, regular Senate elections shall identify at least the highest ranking alternate, that is, the candidate receiving the highest number of votes of those not elected. If more than one alternate is identified, the alternates’ names should be submitted in order of rank, based on the number of votes. The names of the winner(s) and all of the alternate(s) shall be reported directly to the Senate office. First choice for replacement is to be the highest ranking alternate, as identified in the most recent regular Senate election; if the highest ranking alternate is not available, then the choice will move to all remaining alternates, in order of their rank by vote. If no alternates are available from the most recent regular Senate election, then the University faculty of the voting unit shall hold a special election to identify a new elected senator, who will complete the unfinished term. This same procedure shall be followed in the replacement of committee members elected at-large by the Senate.

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d) Elected faculty senators are required to maintain a two-thirds attendance rate for both the plenary meetings and the assigned standing committee meetings. Should a senator drop below this level in either meeting category in each of two consecutive years, the senator may resign if
he or she wishes, otherwise the Senate will remove the senator and require the unit to replace that senator with an alternative elected representative.

This provision does not pertain to sabbatical, medical, or other official leaves of absence, or absence related to professional responsibilities.

Section 9

In cases in which a voting unit or geographic location has only one faculty senator, if that senator is unable to attend a meeting of the University Faculty Senate, an alternate may substitute for the senator at the plenary meeting of the Faculty Senate. The alternate may also substitute for the senator at the senator’s committee meeting being held on the same day. The substitute must be identified on the Senate office’s list as an alternate for the voting unit or geographic location and must notify the Senate office in order to receive the same voting privileges as the senator for whom he/she is substituting for the day.

SENATE COMMITTEE ON COMMITTEES AND RULES

Catherine Abendroth
Kimberly Blockett
Renee Borromeo
Stephen Browne
Lisa Mangel
Eric Novotny
Julio Palma (VICE CHAIR)
Laura Pauley
Rose Petrilla
Elizabeth Seymour
Rob Shannon
Keith Shapiro
Amit Sharma
Martin Skladany
Samia Suliman
Bonj Szczygiel
Ann Taylor (CHAIR)
Kent Vrana
Introduction and Rationale

This report is one of a series of legislative reports from the Elections Subcommittee of the Committee on Committees and Rules. The charge of Elections subcommittee was to provide consistency, transparency, and clarity for all University Faculty Senate elections. To that end, this legislation seeks to reorganize the current standing rules for the Committee on Committees and Rules to reflect the creation of a permanent Elections Commission subcommittee and to place both it and the Constitution subcommittee in a new section titled “Subcommittees.” Creating a standing subcommittee in the Committee on Committees and Rules for Elections Commission will functionally aid the parent committee in prioritizing this work. In addition, it will help make the work of both subcommittees more transparent to the Senate and the University.

Recommendation

We recommend the creation of two standing subcommittees under the Committee on Committees and Rules titled “Elections Commission Subcommittee” and “Constitution Subcommittee.” The Elections Commission Subcommittee would focus on the elections managed by the University Faculty Senate. The Constitution Subcommittee would focus on the work of the existing Unit Constitution subcommittee, simply giving that body a title that more accurately reflects its work. (In its meeting on November 30, 2021, the University Faculty Senate approved moving the direct oversight of the Constitution Subcommittee from Senate Council to the Committee on Committees and Rules.)

Please note that the following contains bold text for additions and strikeouts indicating deleted text. Deleted text is notated with [Delete] [End Delete]. Added text is notated with [Add] [End Add].

Standing Rules Article II Section 6 (a)

Section 6

Senate Committees:

(a) Committee on Committees and Rules
1. Membership:

(i) Ten (10) elected faculty senators

(ii) Chair-Elect of the Senate (non-voting)

(iii) Immediate Past Chair of the Senate (non-voting)

(iv) Secretary of the Senate (non-voting)

2. Election: By the Senate Council for a term of two years. Elected members of the Committee may serve no more than four consecutive years nor more than three consecutive years as its chair. Elected members of Senate Council may not serve on the Committee on Committees and Rules.

Duties

3. Duties: The Committee on Committees and Rules shall review and make recommendations on the Senate’s committee structure. It shall appoint the members of all Standing Committees. It shall be responsible for proposing changes in the Constitution, Bylaws, and Standing Rules of the University Faculty Senate for action by the Senate. This committee shall serve as a Nominating Committee to the administrative officers of the University in the selection of University faculty to serve on University-wide committees. In addition, this committee has the investigative function in determining the constitutionality of acts of the Senate, failures to implement Senate legislation, problems resulting from conflicting legislation, and errors in the implementation of legislation. The Committee on Committees and Rules shall have the authority to interpret the Senate Constitution, Bylaws, and Standing Rules subject to review by the Senate. [DELETE] It shall maintain a standing Constitution Subcommittee which shall consult with faculty governance organizations to ensure that their governance documents conform with Senate rules. These functions include review of Unit Constitutions, Bylaws, and Standing Rules. The subcommittee will consist of the Senate Parliamentarian and at least two elected Senators appointed by the Senate Chair and will be chaired by the Senate Secretary. Final vote of approval of the unit governance documents shall be by Senate Council. [END DELETE]

Each spring, the Committee on Committees and Rules shall select a pool of faculty members who will be available to serve as a member of all Division I Intercollegiate Head Coach athletics searches. The Committee on Committees and Rules will ask for nominations from faculty members who are currently participating in or have participated within the last four calendar years on the Senate Committee on Intercollegiate Athletics, the Athletics Integrity Council, and/or the Faculty Partners Program. The assignment of faculty members to serve on a head coach search committee will be the prerogative of the Senate Chair but under most circumstances, it is expected that the faculty member will be drawn from the pool of candidates identified each year by the Committee on Committees and Rules.

Each year the Committee on Committees and Rules shall ask returning and new senators to rank their preferences for committee assignments. The Committee on Committees and Rules will then select the senatorial members of each Standing Committee, taking into consideration the
preferences of senators. Where a representative of an administrative office is to be an ex officio member of a committee, this member will be selected by the Committee on Committees and Rules in consultation with the appropriate administrative officer. Appointments to all committees should reflect the variety of disciplines, functions, and geographic locations of University units. Annually, the Committee on Committees and Rules shall elect its own Chair and Vice Chair. In consultation with the Senate Chair, the Committee shall designate the leadership of all other Standing Committees of the Senate.

While the Senate officers are the primary faculty representatives to the Big Ten Academic Alliance, the Committee on Committees and Rules shall be informed and consulted on faculty governance issues that arise in the CIC. Such items will be periodically reported to the Senate.

[ADD] 4. Subcommittees [END ADD]

[DELETE] 4. Mandated reports: Nomination report. The Committee on Committees and Rules shall have the authority to approve its mandated Informational Reports for publication to the Senate Agenda. The committee shall send its Informational Reports to the Senate Council. [END DELETE]

[ADD] (i) It shall maintain a standing Constitution Subcommittee which shall consult with faculty governance organizations to ensure that their governance documents conform with Senate rules. These functions include review of Unit Constitutions, Bylaws, and Standing Rules. The subcommittee will consist of the Senate Parliamentarian and at least two elected Senators appointed by the Senate Chair and will be chaired by the Senate Secretary. Final vote of approval of the unit governance documents shall be by Senate Council.

(ii) Elections Commission Subcommittee: The subcommittee will have at least three members, including the chair of the Committee on Committees and Rules and the Senate Parliamentarian and will be chaired by the Senate Secretary. Membership of this subcommittee should not overlap with the Nominating Committee. The subcommittee shall have responsibility over the Senate Census and responsibility over all Senate run elections. [END ADD]

[ADD] 5. Mandated reports: Nomination report. The Committee on Committees and Rules shall have the authority to approve its mandated Informational Reports for publication to the Senate Agenda. The committee shall send its Informational Reports to the Senate Council. [END ADD]

Revised Copy

Standing Rules Article II Section 6 (a)

Section 6
Senate Committees:

(a) Committee on Committees and Rules

1. Membership:

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(ii) Chair-Elect of the Senate (non-voting)

(iii) Immediate Past Chair of the Senate (non-voting)

(iv) Secretary of the Senate (non-voting)

2. Election: By the Senate Council for a term of two years. Elected members of the Committee may serve no more than four consecutive years nor more than three consecutive years as its chair. Elected members of Senate Council may not serve on the Committee on Committees and Rules.

Duties

3. Duties: The Committee on Committees and Rules shall review and make recommendations on the Senate’s committee structure. It shall appoint the members of all Standing Committees. It shall be responsible for proposing changes in the Constitution, Bylaws, and Standing Rules of the University Faculty Senate for action by the Senate. This committee shall serve as a Nominating Committee to the administrative officers of the University in the selection of University faculty to serve on University-wide committees. In addition, this committee has the investigative function in determining the constitutionality of acts of the Senate, failures to implement Senate legislation, problems resulting from conflicting legislation, and errors in the implementation of legislation. The Committee on Committees and Rules shall have the authority to interpret the Senate Constitution, Bylaws, and Standing Rules subject to review by the Senate.

Each spring, the Committee on Committees and Rules shall select a pool of faculty members who will be available to serve as a member of all Division I Intercollegiate Head Coach athletics searches. The Committee on Committees and Rules will ask for nominations from faculty members who are currently participating in or have participated within the last four calendar years on the Senate Committee on Intercollegiate Athletics, the Athletics Integrity Council, and/or the Faculty Partners Program. The assignment of faculty members to serve on a head coach search committee will be the prerogative of the Senate Chair but under most circumstances, it is expected that the faculty member will be drawn from the pool of candidates identified each year by the Committee on Committees and Rules.

Each year the Committee on Committees and Rules shall ask returning and new senators to rank their preferences for committee assignments. The Committee on Committees and Rules will then select the senatorial members of each Standing Committee, taking into consideration the preferences of senators. Where a representative of an administrative office is to be an ex officio
member of a committee, this member will be selected by the Committee on Committees and Rules in consultation with the appropriate administrative officer. Appointments to all committees should reflect the variety of disciplines, functions, and geographic locations of University units. Annually, the Committee on Committees and Rules shall elect its own Chair and Vice Chair. In consultation with the Senate Chair, the Committee shall designate the leadership of all other Standing Committees of the Senate.

While the Senate officers are the primary faculty representatives to the Big Ten Academic Alliance, the Committee on Committees and Rules shall be informed and consulted on faculty governance issues that arise in the CIC. Such items will be periodically reported to the Senate.

4. Subcommittees

(i) Constitution Subcommittee: The subcommittee shall consult with faculty governance organizations to ensure that their governance documents conform with Senate rules. These functions include review of Unit Constitutions, Bylaws, and Standing Rules. The subcommittee will consist of the Senate Parliamentarian and at least two elected Senators appointed by the Senate Chair and will be chaired by the Senate Secretary. Final vote of approval of the unit governance documents shall be by Senate Council.

(ii) Elections Commission Subcommittee: The subcommittee will have at least three members, including the chair of the Committee on Committees and Rules and the Senate Parliamentarian and will be chaired by the Senate Secretary. Membership of this subcommittee should not overlap with the Nominating Committees. The subcommittee shall have responsibility over the Senate Census and responsibility over all Senate run elections.

5. Mandated reports: Nomination report. The Committee on Committees and Rules shall have the authority to approve its mandated Informational Reports for publication to the Senate Agenda. The committee shall send its Informational Reports to the Senate Council.

**SENATE COMMITTEE ON COMMITTEES AND RULES**

Catherine Abendroth  
Kimberly Blockett  
Renee Borromeo  
Stephen Browne  
Lisa Mangel  
Eric Novotny  
Julio Palma (VICE CHAIR)  
Laura Pauley  
Rose Petrilla  
Elizabeth Seymour  
Rob Shannon  
Keith Shapiro  
Amit Sharma
SENATE COMMITTEE ON COMMITTEES AND RULES

Revisions to Senate Standing Rules Article I Section 12 (e)

(Legislative)

Implementation: Upon approval by the Senate

Introduction and Rationale

This report is one of a series of legislative reports from the Elections Subcommittee of the Committee on Committees and Rules. The charge of the subcommittee was to provide consistency, transparency, and clarity for all University Faculty Senate elections.

Article I Section 12 (e) of the Standing Rules describes the role and appointment process of the election tellers. Tellers verify the election results and according to Robert’s Rules of Order should be chosen for accuracy and dependability and have no direct personal involvement in the result of the vote to the extent that they should abstain from voting. These principles can be most reliably maintained by senators who are members of the Elections Commission, which already has the authority to supervise the elections.

As currently written, tellers are appointed by the Senate Chair from among the members of the Senate at large. As the Elections Commission has the authority to supervise elections, it would provide more consistency and transparency if the Senate’s tellers were selected from among the members of that body instead of from the Senate at large.

Recommendation

We recommend changing the way that the Senate’s tellers are selected. This legislation proposes that the Senate’s tellers be selected from among the members of the Elections Commission, as that body has responsibility over all Senate-run elections.

Please note that the following contains bold text for additions and strikeouts indicating deleted text. Deleted text is notated with [Delete] [End Delete]. Added text is notated with [Add] [End Add].

Standing Rules Article, I

Section 12

(e) Votes shall be counted or verified by three tellers, [DELETE] appointed by the Chair of the Senate from among the members of the Senate [END DELETE] [ADD] formed from members of the Elections Commission [END ADD] who are not members of the Nominating Committee [see (c)]. The tellers will report the results of the election to the Executive Director of the Senate
Office who will immediately inform the Senate officers, candidates, and the chair of the Committee on Committees and Rules of these results. The full Senate will be notified of the results in a timely fashion.

**Revised Copy**

Standing Rules Article, I

Section 12

(e) Votes shall be counted or verified by three tellers, formed from members of the Elections Commission who are not members of the Nominating Committee [see (c)]. The tellers will report the results of the election to the Executive Director of the Senate Office who will immediately inform the Senate officers, candidates, and the chair of the Committee on Committees and Rules of these results. The full Senate will be notified of the results in a timely fashion.

**SENATE COMMITTEE ON COMMITTEES AND RULES**

Catherine Abendroth
Kimberly Blockett
Renee Borromeo
Stephen Browne
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Eric Novotny
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Laura Pauley
Rose Petrilla
Elizabeth Seymour
Rob Shannon
Keith Shapiro
Amit Sharma
Martin Skladany
Samia Suliman
Bonj Szczygiel
Ann Taylor (CHAIR)
Kent Vrana
Introduction

Diversity, equity, and inclusion are fundamental to the University’s values and mission to support all members of our Commonwealth and beyond. But ensuring diversity, equity, and inclusion is not the responsibility of any one individual or any one unit, task force, or committee. To truly incorporate these values into our research, teaching, learning, outreach, assessment, operations, and decision making—at all levels of the University—we must ensure that the work of the entire University Faculty Senate considers diversity, equity, and inclusion (DEI) in a meaningful and actionable way in everything we do.

During the 2020-2021 academic year, each Senate standing committee was charged with examining how DEI could be better incorporated into its duties. This legislative report seeks to revise the standing rules for the Admissions, Records, Scheduling, and Student Aid (ARSSA) Committee in a simple but important way to reflect the dedication this committee has to advancing DEI throughout our work.

Recommendation

We recommend that the Standing Rules, Article II–Senate Committee Structure, Section 6 (b) be revised as follows.

Please note that the following contains bold text for additions and strikeouts indicating deleted text. Deleted text is notated with [Delete] [End Delete]. Added text is notated with [Add] [End Add].

(b) Committee on Admissions, Records, Scheduling, and Student Aid

1. Membership:
(i) At least ten elected faculty senators
(ii) [Add] At least [End Add] two undergraduate student senators

(iii) Assistant Vice President for Undergraduate Education and Executive Director for Undergraduate Admissions

(iv) [Delete] The [End Delete] [Add] Assistant Vice President for Undergraduate Education and [End Add] University Registrar

(v) Assistant Vice President for Undergraduate Education and Executive Director for Student Aid

[Add] (vi) Assistant Vice President, Executive Director for Academic Services and Assessment

(vii) Assistant Dean for Graduate Student Services

(viii) Member of the academic advising community appointed by the Associate Dean for Advising [End Add]

2. Selection: By the Committee on Committees and Rules

Duties

3. Duties: The Committee on Admissions, Records, Scheduling, and Student Aid shall initiate legislation relating to academic admissions and readmission standards for the Senate Policies and Procedures for Undergraduate Students. [Add] With a focus on equity and inclusion, it [End Add] [Delete] 4 [End Delete] shall make recommendations on policies concerning the effect that Admissions, Records, Scheduling, and Student Aid procedures have on the attainment of the University’s overall educational objectives. [Add] Analyses for disparate impact should be conducted for overall functional assessment (e.g., how do scheduling processes impact students with minoritized identities [dis/abilities, BIPOC, first generation]?) as well as for any recommended policy changes. [End Add] It shall be the University Faculty Senate advisory body to the Vice President and Dean for Undergraduate Education, and it shall maintain liaison with other University officials in these areas. It shall be concerned with policies involving student awards, scholarships, and student aid. It shall have the authority to act on individual problems of reinstatement and certification of credit referred to it by the Vice President and Dean for Undergraduate Education.

4. Standing Subcommittee on Articulation

The ARSSSA Articulation Review Subcommittee membership shall include two faculty from ARSSSA, including the Vice Chair of ARSSSA, who serves as chair, in addition to [Delete] four [End Delete] [Add] five [End Add] other representatives: one from the Undergraduate Admissions Office, one from the Office of Student Aid, one from the Office of the University Registrar, [Add] one from the Office of the Vice President for Commonwealth Campuses, [End Add] and one from the Office of [Add] Penn State [End Add] Global [Delete] Programs [End Delete]. [Add] The committee may call upon the articulation agreement proposer for
consultation on any given proposal. [End Add] The University Faculty Senate Office (Senate Office) shall facilitate composition by requesting those offices to identify representatives.

The subcommittee shall review articulation agreements to ensure they adhere to the current University policies.

5. Mandated reports:
   a. Reserved Spaces Report
   b. Faculty Senate Scholarship Report
   c. High School Students Enrolled in Nondegree Credits
   d. Articulation Agreement Report based on five-year review

The Committee on Admissions, Records, Scheduling, and Student Aid shall have the authority to approve its mandated Informational Reports for publication to the Senate Agenda. The committee shall send its Informational Reports to the Senate Council.

Clean Copy

1. Membership:
   (i) At least ten elected faculty senators
   (ii) At least two undergraduate student senators
   (iii) Assistant Vice President for Undergraduate Education and Executive Director for Undergraduate Admissions
   (iv) Assistant Vice President for Undergraduate Education and University Registrar
   (v) Assistant Vice President for Undergraduate Education and Executive Director for Student Aid
   (vi) Assistant Vice President, Executive Director for Academic Services and Assessment
   (vii) Assistant Dean for Graduate Student Services
   (viii) member of the academic advising community appointed by the Associate Dean for Advising

2. Selection: By the Committee on Committees and Rules

Duties

3. Duties: The Committee on Admissions, Records, Scheduling, and Student Aid shall initiate legislation relating to academic admissions and readmission standards for the Senate Policies and Procedures for Undergraduate Students. With a focus on equity and inclusion, it shall make recommendations on policies concerning the effect that Admissions, Records, Scheduling, and Student Aid procedures have on the attainment of the University’s overall educational objectives.
Analyses for disparate impact should be conducted for overall functional assessment (e.g., *how do scheduling processes impact students with minoritized identities [dis/abilities, BIPOC, first generation]?*) as well as for any recommended policy changes. It shall be the University Faculty Senate advisory body to the Vice President and Dean for Undergraduate Education, and it shall maintain liaison with other University officials in these areas. It shall be concerned with policies involving student awards, scholarships, and student aid. It shall have the authority to act on individual problems of reinstatement and certification of credit referred to it by the Vice President and Dean for Undergraduate Education.

4. Standing Subcommittee on Articulation

The ARSSA Articulation Review Subcommittee membership shall include two faculty from ARSSA, including the Vice Chair of ARSSA, who serves as chair, in addition to five other representatives: one from the Undergraduate Admissions Office, one from the Office of Student Aid, one from the Office of the University Registrar, one from the Office of the Vice President for Commonwealth Campuses, and one from the Office of Penn State Global. The committee may call upon the articulation agreement proposer for consultation on any given proposal. The University Faculty Senate Office (Senate Office) shall facilitate composition by requesting those offices to identify representatives.

The subcommittee shall review articulation agreements to ensure they adhere to the current University policies.

5. Mandated reports:

a. Reserved Spaces Report
b. Faculty Senate Scholarship Report
c. High School Students Enrolled in Nondegree Credits
d. Articulation Agreement Report based on five-year review

The Committee on Admissions, Records, Scheduling, and Student Aid shall have the authority to approve its mandated Informational Reports for publication to the Senate Agenda. The committee shall send its Informational Reports to the Senate Council.

**2021-2022 SENATE COMMITTEE ON ADMISSIONS, RECORDS, SCHEDULING, AND STUDENT AID (ARSSA)**

Eli Byrne
Penny Carlson
Wei-Fen Chen
Michelle Corby
Tracy Fausnight
Sam Findley
Katherine Garren
Sydney Gibbard
Marissa Gillespie
Edward Glantz
Daniel Gross
Richard Harnish, Alternate Fall 2021
Allen Larsen
Robert Kubat
Melissa Kunes
Kathleen Phillips, Chair
Lisa Scalzi
Maura Shea, Vice Chair
Rob Springall
Matthew Strupczewski
Douglas Wolfe

2022-2023 SENATE COMMITTEE ON COMMITTEES AND RULES

Catherine Abendroth
Kim Blockett
Stephen Browne
Beth King
Judy Ozment
Julio Palma, Vice Chair
Beth Seymour
Keith Shapiro
Amit Sharma
Michele Stine
Bonj Szczygiel
Nathan Tallman
Ann Taylor, Chair
Kent Vrana
Josh Wede
Introduction and Rationale

Diversity, equity, and inclusion are fundamental to the University’s values and mission to support all members of our Commonwealth and beyond. But ensuring diversity, equity, and inclusion is not the responsibility of any one individual or any one unit, task force, or committee. To truly incorporate these values into our research, teaching, learning, outreach, assessment, operations, and decision making—at all levels of the University—we must ensure that the work of the entire University Faculty Senate considers diversity, equity, and inclusion (DEI) in a meaningful and actionable way in everything we do.

During the 2020-2021 academic year, each Senate standing committee was charged with examining how DEI could be better incorporated into its duties. This legislative report seeks to revise the standing rules for the Committee on Educational Equity and Campus Environment in a simple but important way to reflect the dedication this committee has to advancing DEI throughout our work.

Recommendation

We recommend that the Standing Rules, Article II–Senate Committee Structure, Section 6 (e) be revised as follows.

Please note that the following contains bold text for additions and strikeouts indicating deleted text. In addition, deleted text is delimited with [Delete] [End Delete] pairs while added text is delimited with [Add] [End Add] pairs.

(e) Committee on Educational Equity and Campus Environment

1. Membership:

(i) At least seven elected faculty senators with at least two senators from locations other than University Park
(ii) One undergraduate student senator
(iii) One graduate student senator
(iv) One representative from each of the following Commissions (selected by each Commission):
   (a) Commission on Lesbian, Gay, Bisexual, and Transgender Equity
(b) Commission on Racial/Ethnic Diversity
(c) Commission for Women
(v) Vice Provost for Educational Equity

2. Selection: By the Committee on Committees and Rules

3. Duties: The Committee on Educational Equity and Campus Environment will recommend policy and advise the University on educational equity, inclusion, diversity, and sustainability, as related to educational equity in the campus environment across the entire University at all of its campuses. The Committee will initiate explorations and investigations to ensure principles of equity are integrated throughout Senate deliberations. The purview of the Committee shall include all matters as they relate to equity and diversity. It shall also be the Senate advisory board to the Vice Provost of Educational Equity.

4. Mandated reports: The Committee shall report to the Senate at least annually. The Committee on Educational Equity and Campus Environment shall have the authority to approve its mandated Informational Reports for publication to the Senate Agenda. The committee shall send its Informational Reports to the Senate Council.

Revised Policy/Policies

(e) Committee on Educational Equity and Campus Environment

1. Membership:
(i) At least seven elected faculty senators with at least two senators from locations other than University Park
(ii) One undergraduate student senator
(iii) One graduate student senator
(iv) One representative from each of the following Commissions (selected by each Commission):
   (a) Commission on Lesbian, Gay, Bisexual, and Transgender Equity
   (b) Commission on Racial/Ethnic Diversity
   (c) Commission for Women
(v) Vice Provost for Educational Equity

2. Selection: By the Committee on Committees and Rules

3. Duties: The Committee on Educational Equity and Campus Environment will recommend policy and advise the University on educational equity, inclusion, diversity, and sustainability, as related to educational equity in the campus environment across the entire University at all of its campuses. The Committee will initiate explorations and investigations to enhance and encourage the integration of principles of equity throughout Senate deliberations. The purview of the Committee shall include all matters as they relate to equity and diversity. It shall also be the Senate advisory board to the Vice Provost of Educational Equity.

4. Mandated reports: The Committee shall report to the Senate at least annually. The Committee on Educational Equity and Campus Environment shall have the authority to approve its
mandated Informational Reports for publication to the Senate Agenda. The committee shall send its Informational Reports to the Senate Council.

**2021-2022 SENATE COMMITTEE ON COMMITTEES AND RULES**

Catherine Abendroth
Kimberly Blockett
Renee Borromeo
Stephen Browne
Lisa Mangel
Eric Novotny
Julio Palma, Vice-Chair
Laura Pauley
Rose Petrilla
Elizabeth Seymour
Rob Shannon
Keith Shapiro
Amit Sharma
Martin Skladany
Samia Suliman
Bonj Szczygiel
Ann Taylor, Chair
Kent Vrana

**2021-2022 SENATE COMMITTEE ON EDUCATIONAL EQUITY AND CAMPUS ENVIRONMENT**

Douglas Bird, Chair
Arpan Yagnik, Vice Chair
Nathanial Brown
Alison Chetlen
Felecia Davis
Kaitlin Farnan
Derek Fox
Matt Lear
Busi Makoni
Christian Myers
Brian Patchcoski
Lillian Schaeffer
Margaret Signorella
Jonte Taylor
SENATE COMMITTEES ON COMMITTEES AND RULES AND OUTREACH

Revision to Standing Rules, Article II – Senate Committee Structure, Section 6 (l) Committee on Outreach

(Legislative)

Implementation: Upon approval by the Senate

Introduction and Rationale

Diversity, equity, and inclusion are fundamental to the University’s values and mission to support all members of our Commonwealth and beyond. But ensuring diversity, equity, and inclusion is not the responsibility of any one individual or any one unit, task force, or committee. To truly incorporate these values into our research, teaching, learning, outreach, assessment, operations, and decision making—at all levels of the University—we must ensure that the work of the entire University Faculty Senate considers diversity, equity, and inclusion (DEI) in a meaningful and actionable way in everything we do.

During the 2020-2021 academic year, each Senate standing committee was charged with examining how DEI could better be incorporated into its duties. This legislative report seeks to revise the standing rules for the Outreach Committee in a simple but important way to reflect the dedication this committee has to advancing DEI throughout our work.

Recommendation

We recommend that the Standing Rules, Article II—Senate Committee Structure, Section 6 (l) be revised as follows.

Please note that the following contains bold text for additions and strikeouts indicating deleting text. Deleted text is notated with [Delete] [End Delete]. Added text is notated with [Add] [End Add].

(l) Committee on Outreach

1. Membership:

(i) At least nine elected faculty senators

(ii) One student senator

(iii) Vice President for Outreach or their designee

(iv) Director of Penn State Extension
(V) A representative from the Office of the Vice President for the Commonwealth Campuses, designated with statewide responsibility for continuing education and outreach activities

2. Selection: By the Committee on Committees and Rules

Duties
3. Duties: The Committee on Outreach recommends policy and advises the University on outreach activities. Outreach is the exchange of information and the creation of meaningful collaborations between the University and its many external audiences. Responsibilities for the Outreach committee include: identifying University outreach activities, establishing evaluation methods to ensure quality, and creating recognition measures to reward outstanding performance. Its responsibilities focus on the University’s outreach and public scholarship mission as realized through community engagement, [Add] transdisciplinary [End Add] research, credit and noncredit instruction, service through continuing and online education, cooperative extension, public broadcasting, and other programs beyond the sphere of resident education. These outreach activities are located in Penn State Outreach and Online Education, Penn State Extension, and in Penn State colleges, [Add] interdisciplinary institutes (such as the Sustainability Institute), [End Add] and the Commonwealth Campuses. [Add] Penn State seeks to intentionally embed, prioritize, and demonstrate a commitment to values, goals, and principles of diversity, equity, and inclusion in its Outreach programming, communication strategy, messaging, imagery, and framing, whether programs emerge from external stakeholders or internally. Quality evaluation will include the effectiveness of DEI. Outstanding performance in DEI will be recognized. [End Add] The Committee on Outreach liaises with the Senate Committee on Education, the bodies that are addressing engaged scholarship and other bodies as appropriate.

4. Mandated reports: none. The Committee on Outreach shall send its Informational Reports to the Senate Council.

**Revised Policy**

(l) Committee on Outreach

1. Membership:

(i) At least nine elected faculty senators

(ii) One student senator

(iii) Vice President for Outreach or their designee

(iv) Director of Penn State Extension
(V) A representative from the Office of the Vice President for the Commonwealth Campuses, designated with statewide responsibility for continuing education and outreach activities

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4. Mandated reports: none. The Committee on Outreach shall send its Informational Reports to the Senate Council.

2021-2022 SENATE COMMITTEE ON OUTREACH

Harold Aurand, Vice Chair
Margaret Bachelor
Peter Boger
Valerie Braman
Ali Demirci
Owen Haddad
Brent Hales
Melissa Hardy
Federico Harte
Tracey Huston
Appendix G
9/13/22

Rena Kass
Kathleen Noce
Cynthia Simmons, Chair
Nicole Williams

2022-2023 SENATE COMMITTEE ON COMMITTEES AND RULES

Catherine Abendroth
Kim Blockett
Stephen Browne
Beth King
Judy Ozment
Julio Palma, Vice Chair
Beth Seymour
Keith Shapiro
Amit Sharma
Michele Stine
Bonj Szczygiel
Nathan Tallman
Ann Taylor, Chair
Kent Vrana
Josh Wede
First-year seminars (FYS) have been a curricular requirement for Penn State undergraduates since 1997; a revision that expanded seminars to broader and more flexible First Year Engagement (FYE) plans (but which still include seminars at some locations) was adopted by Faculty Senate in 2008. Colleges and campuses have used the flexibility of these more holistic plans to develop a range of approaches, engagement opportunities, and variable credit courses/seminars. Implementation of First-Year Engagement plans was evaluated in a report by the Special Senate Committee Assessing the First-Year Engagement Plan in 2016. In the 2016 report it was observed that the educational goals and engagement plans have evolved both to meet the needs of our students and due to the context of our teaching and learning environments.

FYE/S has continued to grow and change, including efforts to connect first year seminar and engagement leaders as a community. However, these changes are not manifest in the (now outdated) FYE plans or articulated goals of the first-year seminar. Because the 2008 FYE/FYS legislation also called upon Senate to review this portion of the curriculum every 5 years, this is an opportune time to revisit the learning goals and objectives of this key introductory portion of our curriculum.

In addition, we have identified two issues with the language and implementation of the first-year seminar requirement in the original legislation. First, many of our seminar courses are ably taught by highly qualified faculty and staff instructors. We need to update the language to be inclusive of all instructors (not just faculty) who teach these courses. Second, the original legislation aimed to engage students in a specific disciplinary area. However, many students enter Penn State with a goal of exploring different majors, uncertain or undecided about their future major, or interested in an interdisciplinary area. To enable and support these students, it is beneficial to broaden the FYS common course numbers to include the potential for offering an interdisciplinary or exploratory seminar.

**Recommendations.** We recommend initial policy updates and formation of a committee to fully consider the learning goals and objectives of the first-year engagement plans, including seminars and their role in the university curricular requirements.

1. Recommend making the updates to Policy 150-60 to replace the word “faculty” with “instructors” to be inclusive of all instructors who teach FYS. Other edits to update for consistency with our policy language as shown below.
2. Recommend addition of a new PSU course number for an interdisciplinary or exploratory seminar.

3. We recommend the formation of a special committee to examine and make recommendations on updates to the First Year Engagement plan and learning goals and objectives of FYS in Policy 150-65, to enable these to accurately reflect our current context and evaluation of learning outcomes. This committee should comprise members from the Senate Committees of Education and Curricular Affairs as well as members of the FYE educational community.

2021-2022 SENATE COMMITTEE ON CURRICULAR AFFAIRS

Adams, Jeff
Belanger, Jonna
Berish, Diane
Burkholder, Joel
Callejo, David
Chewning, Lisa
Farrar, Katelyn
Hamaty, Paula
Harper, Betty
Hayford, Harold, co- Vice-Chair
Hemerly, Nathan
Jordan, Matthew
Kenyon, William, co-Vice-Chair
Linch, Amy
Linn, Suzanna
Mahoney, Joseph
Marshall, Megan
McCloskey, Andrea
Melton, Robert
Mistrick, Richard
Purdy Drew, Kirstin
Robinson, Brandi
Schulenburg, Janet
Slattery, Maggie
Slot, Johanna
Sprow Forte, Karin
Thomas, Emily
Warner, Alfred
Williams, Mary Beth, Chair
Yen, John
150-60 First-Year Seminars/Engagement Plans

[delete] The University Faculty Senate, at its meeting on December 2, 1997, approved a requirement that each student will complete, during the first academic year, a seminar course for a minimum of one credit. These First-Year Seminars are expected to be taught by full-time, regular Penn State faculty instructors (Fixed Term I appointments with at least 3 years of teaching experience at Penn State, instructors and tenure-line faculty) and are expected to be taught in small sections. General Education First-Year Seminar requirement implementation.

At the April 29, 2008 meeting, the University Faculty Senate replaced the existing First-Year Seminar requirement as follows: [end delete] Each University Park academic college, each of the 19 Commonwealth campuses, and the Division of Undergraduate Studies (DUS) [delete], all of which are called “units” for the purposes of this report, [end delete] shall submit a First-Year Engagement (FYE) Plan for achieving the goals and objectives of first-year engagement [delete], as stated in the 1997 report of the SCGE, [end delete] for all first-year baccalaureate students. [add] All University Park academic colleges will, and other units may, include within their FYE plan a seminar course for undergraduates during their first academic year for a minimum of one credit. These First-Year Seminars are expected to be taught in small sections. [end add]

[delete] To fulfill the requirements for First-Year Seminars/Engagement Plans, as established by the University Faculty Senate, [end delete] All First-Year Seminar courses must possess the following characteristics:

1. They will have academic content and be offered for academic credit.
2. They will be the responsibility of the colleges, but once taken, all other colleges will accept them.
3. They will be taught in small classes, with an expected maximum enrollment of 25.
4. They are expected to be taught by full-time, [delete] regular [end delete] Penn State faculty [end delete] instructors [add] [end add].
5. They should be taken during the student’s first academic year.

150-65 Goals and Objectives of the Penn State First-Year Seminar/Engagement Plan. The goals of the Penn State First-Year Seminar/Engagement Plans [delete] as stated in the supporting information from the Senate Legislation [end delete] [add] are [end add]:
• To engage students in learning and orient them to the scholarly community from the outset of their undergraduate studies in a way that will bridge to later experiences in their chosen majors.
• To facilitate students’ adjustment to the high expectations, demanding workload, increased liberties, and other aspects of the transition to college life.

The objectives of the Penn State First-Year Seminar/Engagement Plan are, as stated in the supporting information from the Senate Legislation:

• To introduce students to university study.
• To introduce students to Penn State as an academic community, including fields of study and areas of interest available to students.
• To acquaint students with the learning tools and resources available at Penn State.
• To provide an opportunity for students to develop relationships with full-time faculty and other students in an academic area of interest to them.
• To introduce students to their responsibilities as part of the University community.

The implementation of the FYE plans can be found in the informational report by the Committee on Undergraduate Education.

150-68. Review of FYE. According to the April 2008 Senate legislation, FYE will next be reviewed in every five years.

171-40 First Year Seminar Course Numbers. The one credit “Penn State First-Year Seminar” may be offered under PSU XXX for academic units wishing to approach this offering in this manner. Each college has been assigned a unique number for its use in offering these seminars. A course number for an interdisciplinary or exploratory seminar is also available for any unit(s) to use, if desired.

Academic units may also use their own numbers for these courses. An appropriate suffix/attribute will be appended to unit specific course numbers. Colleges which have provided in their plan a description of the specific objectives to be achieved through the 1 credit seminar and a set of criteria through which the attainment of these objectives can be assessed, may use either the
PSU number or the unit specific number to teach the First-Year Seminars. No additional course proposal will be required.

*The following course numbers have been assigned by SCCA:*

PSU 1 First-Year Seminar Abington
PSU 2 First-Year Seminar Agricultural Science
PSU 3 First-Year Seminar Altoona
PSU 4 First-Year Seminar Arts and Architecture
PSU 5 First-Year Seminar Berks
PSU 6 First-Year Seminar Business
PSU 7 First-Year Seminar Behrend
PSU 8 First-Year Seminar University College
PSU 9 First-Year Seminar Communications
PSU 10 First-Year Seminar Earth and Mineral Sciences
PSU 11 First-Year Seminar Education
PSU 12 First-Year Seminar Engineering
PSU 13 First-Year Seminar Harrisburg
PSU 14 First-Year Seminar Health and Human Development
PSU 15 First-Year Seminar Liberal Arts
PSU 16 First-Year Seminar Science
PSU 17 First-Year Seminar Information Sciences and Technology

*add* PSU 18 First-Year Seminar Interdisciplinary and Exploratory *end add*
First-Year Seminars that are to be offered for more than one credit will require a full course proposal addressing the criteria for the First-Year Seminar/Engagement Plans. It is important that these proposals address the impact, if any, of the use of a seminar of more than 1 credit, on the total credits in programs for which the seminar might be required. If the number of credits in a program is changed as a result of the multiple credit First-Year Seminar requirement, a program revision will need to be submitted for each of the affected programs at the same time as the proposed course. Multiple credit First-Year Seminar courses will have regular program course numbers from the academic unit offering the course, with the appropriate S (Seminar), T (Honors Seminar) or X (Writing Across the Curriculum Seminar) suffix/attribute.
150-60 First-Year Seminars/Engagement Plans

Each University Park academic college, each of the 19 Commonwealth campuses, and the Division of Undergraduate Studies (DUS) shall submit a *First-Year Engagement (FYE) Plan* for achieving the goals and objectives of first-year engagement for all first-year baccalaureate students. All University Park academic colleges will, and other units may, include within their FYE plan a seminar course for undergraduates during their first academic year for a minimum of one credit. These First-Year Seminars are expected to be taught in small sections.

All First-Year Seminar courses must possess the following characteristics:

1. They will have academic content and be offered for academic credit.
2. They will be the responsibility of the colleges, but once taken, all other colleges will accept them.
3. They will be taught in small classes, with an expected maximum enrollment of 25.
4. They are expected to be taught by full-time Penn State instructors.
5. They should be taken during the student’s first academic year.

150-65 Goals and Objectives of the Penn State First-Year Seminar/Engagement Plan. The goals of the Penn State First-Year Seminar/Engagement Plans are:

- To engage students in learning and orient them to the scholarly community from the outset of their undergraduate studies in a way that will bridge to later experiences in their chosen majors.
- To facilitate students’ adjustment to the high expectations, demanding workload, increased liberties, and other aspects of the transition to college life.

The objectives of the Penn State First-Year Seminar/Engagement Plan are:

- To introduce students to university study.
- To introduce students to Penn State as an academic community, including fields of study and areas of interest available to students.
- To acquaint students with the learning tools and resources available at Penn State.
• To provide an opportunity for students to develop relationships with full-time instructors and other students in an academic area of interest to them.
• To introduce students to their responsibilities as part of the University community.

150-68. Review of FYE. FYE will be reviewed every five years.

171-40 First Year Seminar Course Numbers. The one credit “Penn State First-Year Seminar” may be offered under PSU XXX for academic units wishing to approach this offering in this manner. Each college has been assigned a unique number for its use in offering these seminars. A course number for an interdisciplinary or exploratory seminar is also available for any unit(s) to use, if desired.

Academic units may also use their own numbers for these courses. An appropriate suffix/attribute will be appended to unit specific course numbers. Colleges which have provided in their plan a description of the specific objectives to be achieved through the 1 credit seminar and a set of criteria through which the attainment of these objectives can be assessed, may use either the PSU number or the unit specific number to teach the First-Year Seminars. No additional course proposal will be required.

The following course numbers have been assigned by SCCA:

PSU 1 First-Year Seminar Abington
PSU 2 First-Year Seminar Agricultural Science
PSU 3 First-Year Seminar Altoona
PSU 4 First-Year Seminar Arts and Architecture
PSU 5 First-Year Seminar Berks
PSU 6 First-Year Seminar Business
PSU 7 First-Year Seminar Behrend
First-Year Seminars that are to be offered for more than one credit will require a full course proposal addressing the criteria for the First-Year Seminar/Engagement Plans. It is important that these proposals address the impact, if any, of the use of a seminar of more than 1 credit, on the total credits in programs for which the seminar might be required. If the number of credits in a program is changed as a result of the multiple credit First-Year Seminar requirement, a program revision will need to be submitted for each of the affected programs at the same time as the proposed course. Multiple credit First-Year Seminar courses will have regular program course numbers from the academic unit offering the course, with the appropriate S (Seminar), T (Honors Seminar) or X (Writing Across the Curriculum Seminar) suffix/attribute.
SENATE COMMITTEE ON CURRICULAR AFFAIRS

Update General Education Policies 142-00, 143-10, 143-20, 160-20, 190-10, 192-00, 192-10, 192-20, 193-30

(Legislative)

Implementation: Upon approval by the Senate

**Executive Summary**

This report synthesizes input from assessment and key stakeholders and recommends updating and simplifying the General Education program for undergraduates. Using recommendations in the Joint Committee on General Education Learning Outcomes Assessment report and years of feedback from the advising community, and considering newly compiled data on disparities in student use of flexibility options in General Education, Curricular Affairs has reconsidered how the General Education program is presented to students and implemented as academic requirements. The current General Education program is complicated, making it challenging for students to understand and for advisers to explain, unintentionally diminishing the value of General Education learning for students. The goal of this report is thus to streamline and simplify the presentation of requirements, including long-standing flexible options within the program; our recommendations reaffirm the core principles of curricular flexibility and intellectual exploration in General Education that Faculty Senate values.

As was recommended in the General Education Learning Outcomes report, the Linked Course pathway will be phased out and Integrative Studies becomes a stand-alone 6 credit category. We recognize important integrative learning that happens in upper division courses and recommend extending Integrative Studies to include upper-level courses as an option for students. The Breadth category is adapted to reflect the minimum number of credits required for each domain and Exploration now automates the long-standing practice of “Move 3” while capturing the other 9 credits not reflected in Breadth (the additional 6 of the 30 “knowledge” credits is now accounted for in Integrative Studies.) Finally, we recommend clarifying how we explain our General Education program to create more equitable use of existing General Education flexibility for all undergraduates, increase campus-based flexibility for deciding which specific courses to offer, and make more visible the opportunities for students to select General Education courses that spark their intellectual curiosity. The total number of units (credits) for baccalaureate General Education remains 45; for associate degree General Education, see 160-20 below.

It is important to note that these changes are designed to simplify and clarify the General Education requirements while providing greater flexibility in General Education courses for both students and campuses. These changes are not substantive changes to the General Education requirements, only a shift in the way we account for the requirements.
### Summary of proposed Baccalaureate General Education program

#### Foundations (unchanged): Build a basis of effective communication and quantitative literacy

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 units GQ</td>
<td>C or better (current rule)</td>
</tr>
<tr>
<td>9 units GWS</td>
<td>Single domain only (by default the current rule)</td>
</tr>
<tr>
<td></td>
<td>3 units/credits of a World Language course that exceeds the student’s minimum degree requirements could be applied here (current rule)</td>
</tr>
</tbody>
</table>

#### Breadth (the current minimum of 3 units per Knowledge Domain is unchanged): Practice applying a specific way of constructing knowledge to examine a topic

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 units GA</td>
<td>Single domain only (current rule)</td>
</tr>
<tr>
<td>3 units GH</td>
<td>400 level flexibility could apply here by substitution (current rule)</td>
</tr>
<tr>
<td>3 units GN</td>
<td>No other flexibility can apply here (current rule)</td>
</tr>
<tr>
<td>3 units GS</td>
<td>Students choose courses outside their major prefix for GA, GN, GH, GS (does not apply to GHW, current rule)</td>
</tr>
<tr>
<td>3 units GHW</td>
<td></td>
</tr>
</tbody>
</table>

#### Integrative Studies (modified to become stand-alone category): Practice synthesizing knowledge from different perspectives to examine a topic

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 units with Integrative Studies attribute (N/Q suffix) including: Inter-domain (proposed to now include GQ and GWS) and newly proposed upper-level Integrative Studies courses</td>
<td>Policy 143-20 does not apply to this requirement (different from current)</td>
</tr>
<tr>
<td></td>
<td>Programs cannot prescribe (i.e., these cannot be included in a program’s Gen Ed statement without approved exception by SCCA) (different from current)</td>
</tr>
<tr>
<td></td>
<td>Courses will count either toward this requirement or in the major requirements (different from current). These courses can count toward minors or certificates (current rule).</td>
</tr>
<tr>
<td></td>
<td>Inter-domain courses meet the Integrative Studies designation (current rule)</td>
</tr>
<tr>
<td></td>
<td>Courses with a GQ or GWS designation may be included in Inter-domain courses (different from current, but not changing the Foundation requirement)</td>
</tr>
<tr>
<td></td>
<td>Upper level (300 and 400) courses may carry the Integrative Studies Gen Ed designation without carrying additional Gen Ed domains (different from current)</td>
</tr>
<tr>
<td></td>
<td>Students fulfill this requirement by taking two courses with suffix N/Q (similar to current rule, but removes the need to track and double count with a specific array of knowledge domains)</td>
</tr>
</tbody>
</table>

#### Exploration (modified): Follow intellectual curiosity to deepen or widen learning

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 units of additional GA, GH, GN, GS, and Inter-domain courses and up to 3 units of World Language</td>
<td>Students choose courses outside their major prefix for GA, GN, GH, GS (current rule)</td>
</tr>
<tr>
<td></td>
<td>400 level flexibility could apply here by substitution (current rule)</td>
</tr>
<tr>
<td></td>
<td>A knowledge domain course that exceeds the minimum prescribed requirement automatically counts here (automation of current rule)</td>
</tr>
<tr>
<td></td>
<td>One World Language course that exceeds the student’s minimum degree requirements automatically counts here (automation of current rule)</td>
</tr>
<tr>
<td></td>
<td>Programs cannot prescribe more than the historical distribution of domain credits (i.e., 9 GN, 6 GS, 6 GH, 6 GA, 3 GHW; current rule)</td>
</tr>
</tbody>
</table>
Introduction

The General Education curriculum for all undergraduates at Penn State was legislatively updated for the first time since 1997 in a series of reports approved by the University Faculty Senate (UFS) in 2015 and 2016. As part of these changes, UFS called for continuous assessment of the learning outcomes in general education so that iterative improvements could be made on a shorter timescale. The Standing Joint Committee on General Education Learning Outcomes Assessment (GELO Assessment), which is jointly composed of faculty senators, administrators, and experts in learning outcomes assessment, is charged to collect and analyze data and to make recommendations to UFS about updates to our general education curricular requirements.

The recommendations made here are a result of synthesizing recommendation 2 from the March 2022 report from the Joint Standing Committee on General Education Assessment, four years of input from the advising community (both faculty and professional advisers) and from records experts, and a recent report from Undergraduate Education examining use of the Move-3 (formerly known as the 3-6-9 flexibility) in General Education from an equity perspective. Automating this long-standing process makes this option evenly available to all students without the need for an adviser’s approval. It also realizes the goal of making data-informed, timely changes to the General Education program.

The current level of curricular complexity in General Education is difficult to explain, challenging to represent logically on audits and degree plans, and has reduced student choice in General Education by requiring students to select courses that meet multiple overlapping criteria. We recommend a streamlined presentation of requirements that builds on the long standing and senate-endorsed flexibility within General Education—Move-3, World language substitution, and 400-level substitution — while honoring one of the guiding principles of the General Education task force: “The curriculum should retain flexibility that enables students to make timely progress toward degree completion, and should ideally increase the flexibility students have to choose courses they find intellectually engaging” (Senate Meeting April 28, 2015, Revision to General Education Curriculum report).

First, we recommend phasing out linked courses as a pathway for completing the Integrative Studies curricular requirement and instead allowing the requirement to be met by taking any course that carries the Integrative Studies designation. This simplifies how these courses are represented; all courses approved for Integrative Studies would have the same suffix (N, or Q for honors) and carry a General Education- Integrative attribute.

We propose to expand Integrative Studies, creating another option for students to complete the requirement and building on a long-standing provision that students are currently permitted to complete their general education requirements with more advanced, upper-level coursework. We recommend allowing certification of upper-level courses for the General Education- Integrative attribute to take advantage of this flexibility more fully and to create opportunities for higher order development of integrative thinking in advanced courses. Such courses would be ideally suited for upper-level coursework in some minors.
Further, we recommend simplifying the complexity of general education by codifying the Move-3 flexibility (formerly 3-6-9) in General Education without need for individual request and approval. Move-3 is a popular source of General Education flexibility for students; however, it requires a student/adviser request, approval, and manual audit substitution. This process thus creates barriers to access, unevenness in implementation, and inefficiencies in process. There have been more than 3000 Move-3 substitution requests each year since 2016, and nearly 6000 requests in 2019 alone. In all, there have been 35,000 unique requests for Move-3 substitutions in the CSRS system since it went online in 2014 through April 2022 (even though not all academic units currently use CSRS). Recent data (Move-3 report) confirms anecdotes of uneven use. Underrepresented students and students at Commonwealth Campuses use this flexibility at rates less than would be expected by proportional analysis. This change will allow program requirements to be presented in a more straightforward and less complicated way to students. Students are already permitted to use various forms of flexibility to move credits from, or among, those 5 Knowledge Domains, as long as 3 credits of Single-Domain courses remain in each; and this change simplifies the requirements for all. It will also allow degree audits to be programmed in a way that naturally reflects this flexibility.

We also propose reducing similar barriers to using the World Language substitution. While we do not have as complete data for the World Language substitution in General Education as we do Move-3, we know that there are on the order of 700 or more requests for this flexibility per year. We believe there are similar disparities to Move-3 in use of this provision and propose that this flexibility be similarly incorporated into the routinely acceptable coursework for General Education.

Finally, in this proposal, we recommend a change in how we present General Education to students so that we can highlight the learning goals of our program. The current commingling of integrative studies and exploration within the breadth of knowledge domains complicates explanation, both verbal and visual, and obscures the intent of each component of the Gen Ed program. By clearly separating and naming the categories, we signal the intended learning of each of those components. This reframing moves us away from the overlapping domain counting that limits student choice and flexibility in selecting Integrative Studies courses and systemizes the philosophical intent of the 2015-2016 legislation to highlight integrative thinking and exploration of ideas.

We acknowledge this reorganization allows for some change in patterns of student course-taking. However, this legislation does not propose to change the current distributions of approved prescribed general education courses, which are heavily used in science-related and business-related programs. Nor will this legislation dramatically change students’ interests and patterns of behavior. We anticipate the proposed changes will result in a decrease in the number of students who take an excess of 45 credits to meet General Education requirements, helping us advance our institutional goals of equity and controlling costs for students. We also anticipate the proposed changes will reduce pressure to offer courses that meet specific combinations of

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1 2017-2020 Data from CSRS; retrieved 11/2021. This does not reflect Institutional Transfer Reviews. CSRS is not mandated for units or requests, so data is not comprehensive. Approval of requests is at unit discretion and submission does not guarantee approval.
requirements (for example, GA + GN + Inter-domain) since students will no longer need to select from a narrowed range of choices. Finally, we anticipate the change to Integrative studies will allow development of upper-level courses that prompt deeper examination of inherently integrative issues like sustainability, social justice, and other topics.

**Recommendations**
Based on the input from the university community described above, the work of the Standing Joint Committee on General Education Learning Outcomes Assessment review of data, and recommendations in the March 2022 report, our committee has discussed and recommends:

1. **Phase out Linked Courses and different pathways for Integrative Studies.**
   a. No new Linked Course proposals will be approved starting immediately after approval of this recommendation.
   b. Existing approved Linked Courses will continue with the single-domain general education designation for which they are approved. The Linked attribute and Z-suffix will be removed one year after approval of this recommendation with no additional action required by faculty.
   c. Linked Courses will cease to be a curricular option for fulfilling the Integrative Studies requirement one year after approval of this recommendation. The small number of students who have begun and need to complete a Linked Courses pair will be able to do this via substitution.
   d. SCCA will provide a fast-tracked review process for faculty proposing to convert existing Linked Courses to Integrative Studies. SCCA will create an ad-hoc committee to help fast track proposals to convert Linked Courses into Inter-domain or Integrative Studies Courses through the curricular workflow. If the reorganized courses have the same content, learning goals, and domains, SCCA will work to complete the workflow in 45 days. Administrative support for creating and shepherding these proposals will be available from the Office for General Education.

2. **Allow the six credit Integrative Studies curricular requirement to be completed using any course that is approved for Integrative Studies, including general education or upper-level courses.**
   a. All Integrative Studies courses will carry an Integrative Studies attribute and a suffix of N (Integrative) or Q (Integrative and Honors).
   b. Existing Inter-domain courses remain and continue to satisfy this requirement.
   c. The scope of Inter-domain courses is expanded such that faculty teaching courses that include a focus on learning in GQ and GWS foundations can propose these as Integrative Studies (Inter-domain) courses (e.g. GQ and GN; GWS and GS). This means that courses now may have a GQ or GWS and Inter-domain designation to fulfill the 6 credits of Integrative Studies. *This does not change the Foundations requirement.*
   d. An Integrative Studies designation can be requested via curricular proposal for upper-level undergraduate courses (300 – 400 level) without other General Education domain or foundation designation. The basis for determining if a course is eligible for the Integrative Studies designation will be clear articulation...
of how the course would help a student achieve the Integrative Thinking learning objective, including discussion of what domains and disciplines are the focus of integrative thinking, and addressing how integrative learning will be specifically assessed in the course. Specific learning criteria and a rubric used for proposal reviews will be developed as part of implementation.

e. Courses students select to satisfy this requirement will not be subject to Policies 143-00 and 143-20.

f. Integrative Studies credits cannot be prescribed by a program without exception by the Senate Committee on Curricular Affairs. It is expected that exceptions would be limited to constraints due to licensure/external accreditation requirements.

g. To promote agility and innovative course development, as was implemented for Integrative Studies courses previously, the UFS will allow designation of one semester title (x97) courses to include any General Education (single domain or Inter-domain) or Integrative Studies attribute.

3. Simplify and reorganize the General Education requirements presentation so that the existing Move-3 and Word Language substitution is a routine and acceptable option for students to satisfy the General Education requirements without the need for substitution requests or approval. This codifies a long-standing and extremely common way students have exercised flexibility in their General Education requirements.

a. Foundations requirements – 9 units of GWS and 6 units of GQ remain as a requirement. A quality grade of C or better will continue to be required for these credits, and the requirement cannot be completed with Inter-domain courses.

b. Breadth across the Knowledge Domains – 3 units minimum of each Knowledge Domain (GA, GH, GS, GN, and GHW) will continue to be required and cannot be completed with Inter-domain courses. Policy 143-20 applies to GA, GH, GN, and GS as it currently does.

c. Integrative Studies – 6 units of coursework with Integrative Studies attributes including existing Inter-domain courses and the new upper-level courses proposed as described in bullet 2.d above. The 6 units of Integrative Studies are separated from 15 credits of Breadth and 9 credits of Exploration; Integrative Studies becomes a stand-alone requirement without need for double counting these credits toward both Integrative Studies and General Education knowledge domain requirements.

d. Exploration – 9 units of GA, GH, GN, GS, additional Inter-domain courses, and up to 3 units of World Language coursework beyond the degree requirements as is currently allowed in the Flexibility of General Education.

e. Because Move-3 was intended to provide students with flexibility, programs are specifically restricted from prescribing a general education course-taking pattern in their General Education statement (specifying what can double count between the major and General Education) that exceeds prescription for any domain beyond the historical distribution of credits between each domain (9 GWS, 6 GQ, 6 GA, 6 GH, 6 GS, 9 GN, 3 GHW).
The above recommendations are implemented in these edited Curriculum and Undergraduate Instruction Policies

Please note that the following contains **bold text for additions** and **strikeouts for deleted text.** In addition, added text is delimited with [Add] [End Add] pairs while deleted text is delimited with [Delete] [End Delete] pairs.

### 142-00 Baccalaureate Degree Requirements in the General Education Program

The General Education program consists of 45 credits distributed among **two General Education components:** Foundations (15 credits) in Writing/Speaking and Quantification and Knowledge Domains (30 credits) in the Natural Sciences, Arts, Humanities, Social and Behavioral Sciences, and Health and Wellness. A six-credit requirement in Integrative Studies, through completion of linked or inter-domain coursework, is required within the Knowledge Domain general education credits.

**Foundations (15 credits)**
- **Build a basis of effective communication and quantitative literacy**

**Knowledge Domains (15 credits)**
- **Practice applying a specific way of constructing knowledge to examine a topic**

Students must complete a minimum of 3 credits in each Knowledge Domain; additional credits within the Knowledge domains may either be fulfilled through a single domain course(s) or inter-domain course(s). Courses may not be Integrative Studies/Inter-domain.
• NATURAL SCIENCES (3 credits)
  Courses designated with the GN attribute satisfy this component.
• ARTS (3 credits)
  Courses designated with the GA attribute satisfy this component.
• HUMANITIES (3 credits)
  Courses designated with the GH attribute satisfy this component.
• SOCIAL AND BEHAVIORAL SCIENCES (3 credits)
  Courses designated with the GS attribute satisfy this component.
• HEALTH AND WELLNESS (3 credits)
  Courses designated with the GHW attribute satisfy this component.

Integrative Studies (6 credits) of either Inter-domain or Linked coursework, these credits may overlap with the knowledge domain requirement.

Practice synthesizing knowledge from different perspectives to examine a topic.

• INTER-DOMAIN
  Courses designated with the General Education- Integrative: Inter-domain attribute satisfy this requirement. (The suffix of N or Q (honors) is commonly used for identification purposes.)

• UPPER-LEVEL
  Courses designated with the General Education- Integrative: Upper-level attribute satisfy this requirement. (The suffix of N or Q (honors) is commonly used for identification purposes.)

• Linked
  Courses designated with the Gen Ed Integrative: Linked attribute satisfy this requirement. (The attribute of Z is commonly used on linked courses for degree audit purposes.)

Exploration (9 credits)
  Follow intellectual curiosity to deepen or widen learning.

Select any 9 credits from courses with the GA, GH, GN, GS, or Gen Ed Integrative: Inter-domain attributes and may include 3 credits of World Language course work beyond the 12th credit level or the requirements for the student’s degree program, whichever is higher.
The General Education program extends the concept of flexibility to all aspects of the degree program. Penn State wants students to use General Education as an opportunity to experiment and explore, to take academic risks, to discover things they did not know before, and to learn to do things they have not done before. A student may,

1. Substitute a 200- to 499-level course in an area of General Education for a course found on the General Education list. For example, a student may take a 400-level course in history and use it to meet the General Education requirement satisfied by a comparable lower-level history course.

2. Substitute a world language at the twelfth credit level of proficiency or beyond degree requirements, whichever is higher for 3 credits in either of the Foundation areas (GWS or GQ) of General Education.

[add]

143-10 General Education Statement

Each program may identify courses that may double count between the major and General Education. The courses should satisfy the intention of General Education as well as serve a curricular purpose for the major. The General Education statement should not exceed the number of credits for a General Education domain that exceeds the historically stated requirement for General Education (e.g., 9 GN credits or 6 GS credits) (i.e., 9 GN credits, 6 GS credits, 6 GA credits, 6 GH credits, 6 GQ credits, 9 GWS credits, 3 GHW credits.) Integrative Studies courses should not be included in the General Education Statement. In exceptional cases (e.g., external accreditation constraints), Curricular Affairs may approve exceptions to this limitation. [add]

143-20 Intentional Breadth in General Education

Students whose academic majors are in the areas of natural sciences, arts, humanities, and social and behavioral sciences may not meet the General Education Knowledge Domains components by taking courses in the department or program identical to that of the academic major (this is commonly referred to as the General Education Firewall). All General Education courses are to help students explore and integrate information beyond the special focuses of their majors. For example, an Economics major may not use an economics course to fulfill his/her social and behavioral sciences requirement. Also, students may not count courses cross-listed with courses in their major to fulfill one of the General Education Knowledge Domain, e.g., a Theatre major may not register for THEA 208/AFAM 208 Workshop: Theatre in Diverse Cultures and have it count in the Arts requirement. [add] This provision does not apply to coursework satisfying the Integrative Studies component. [end]
Appendix I

160-20 General Education Requirements for Associate Degrees

The General Education program for Penn State associate degree students consists of 21 credits distributed among communication and quantification skills (6 credits), the Knowledge Domain areas (15 credits), including courses in the natural sciences (3 credits), arts (3 credits), humanities (3 credits), and social and behavioral sciences (3 credits), and an additional 3 credits in any General Education area, including Health and Wellness (GHW). Up to six credits of Inter-domain courses may be used for any Knowledge Domain requirement, but when a course may be used to satisfy more than one requirement, the credits from the course can be counted only once.

FOUNDATIONS - Build a basis of effective communication and quantitative literacy. (Integrative Studies: Inter-domain courses may not be used for this requirement.)

Total 6 credits
Requirement: Writing/Speaking (GWS)* – 3 Credits
Requirement: Quantification (GQ)* – 3 Credits
*Requires a grade of C or better

KNOWLEDGE DOMAINS - Practice applying a specific way of constructing knowledge to examine a topic. (Integrative Studies: Inter-domain courses may be used but, may only apply to one requirement.)

Total 12 credits
Requirement: Natural Sciences (GN) – 3 Credits
Requirement: Arts (GA) – 3 Credits
Requirement: Humanities (GH) – 3 Credits
Requirement: Social and Behavioral Sciences (GS) – 3 Credits
Any additional General Education course – 3 Credits

EXPLORATION - Follow intellectual curiosity to deepen or widen learning
Total 3 credits
In addition to the above Knowledge Domains course requirements, associate degree students must complete 3 credits in any General Education area. Integrative Studies courses may be used for this requirement.

NOTE: Up to six credits of Inter-domain courses may be used for any Knowledge Domain requirement, but when a course is used to satisfy more than one requirement, the credits from the course can be counted only once.

The General Education program extends the concept of flexibility to all aspects of the degree program. Penn State wants students to use General Education as an opportunity to experiment and explore, to take academic risks, to discover things they did not know before, and to learn to do things they have not done before.

To these ends, students may, with the permission of their adviser and dean’s representative, substitute a 200- to 499-level course for an Arts, Humanities,
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Natural Sciences, or Social and Behavioral Sciences course found on the General Education list. For example, a student may take a 400-level course in history and use it to meet the General Education requirement satisfied by a comparable lower-level history course.

190-10 Criteria for General Education Courses
Criteria for determining whether a course meets the general learning objectives of General Education.
All General Education Course proposals must be responsive to the following prompts:
1. Which of the seven General Education Learning Objective(s) will be addressed in the course? A minimum of two (2) Learning Objective must be clearly addressed in the course; it is recommended that each course address two to three (2-3) Learning Objectives and not more than four (4).
2. What component(s) of the course will help students achieve the General Education Learning Objectives covered in the course? Provide evidence that students in the course have adequate opportunities to achieve the identified Learning Objectives.
3. How will students be assessed to determine their attainment of the Learning Objective(s) of General Education covered in the course? This assessment must be included as a portion of the student’s overall performance in the course.
4. Please provide a copy of the current or proposed syllabus.
5. [add] One-time offering approval for any General Education or Integrative Studies course may be requested. Normal UFS policies for maximum number of times per title must be followed.[end add]

192-00 General Education Integrative Studies Criteria
[Delete] Within General Education, students must complete 6 credits in Integrative Studies coursework as part of their General Education requirements. [end add] [delete] and must choose to fulfill this requirement through the Linked Courses Pathway or the Inter-Domain Pathway[end delete].

[DELETE] 192-10 General Principles for the Linked Courses Pathway
Delete the entire policy [END DELETE]

192-20 General Principles for the Inter-Domain Pathway
Integrative Studies courses seeking additional General Education designations (Inter-domain courses) [end add]
1. [delete] An Inter-Domain course integrates [end delete] [add] Some Integrative Studies courses may integrate [end add], within one course, selected perspectives, concepts, information, and knowledge from [delete] two of the following Knowledge Domains: GA, GH, GHW, GN, GS [end delete] [add] one or more General Education area [end add].
2. [delete] An Inter-domain course counts towards the General Education requirement in both of its two Knowledge Domains and it provides opportunities for students to
experience and to practice integrative thinking across those two Domains. 

3. Students must complete 6 credits of Inter-Domain coursework in order to fulfill the Integrative Studies requirement. Because these courses integrate two Knowledge Domains, and need time to do so, they will each carry at least 3 credits. Although students will usually take two 3-credit courses to fulfill this Pathway, students can also use Inter-Domain courses carrying more than 3 credits, if available.

4. Each of the two Knowledge Domains in an Inter-Domain course will receive approximately equal attention (in course topics, assignments, or other course components). Each such course is taught by an instructor, or team of instructors, with appropriate expertise in the two Knowledge Domains for which the course is approved. Inter-Domain courses may be cross-listed or concurrent-listed but this is not required.

5. Although each Inter-Domain course will satisfy a Domain requirement in both of the Knowledge Domains for which it is approved, the number of credits it contributes towards the total of 30 credits required in the Knowledge Domains is not doubled. (For example, a 3-credit course approved as both Natural Science and Social Science will satisfy a Domain requirement in both of those categories; however, this course will contribute 3 credits, not 6, to the total of 30 needed).

6. Inter-Domain courses are proposed by faculty (or teams of faculty) with expertise in the relevant disciplines represented; proposals will follow the established curricular processes for course approvals. Consultation and support from faculty in relevant fields within both Knowledge Domains where the course will count is required.

7. Single-offering or permanent approval for the additional Gen Ed designation(s) may be requested. A course may be offered using single-offering approval a maximum of 3 times at a given location.

8. Proposals for Inter-Domain courses will: Request (or have received) approval as a General Education course and satisfy the criteria for two Knowledge Domains, following the standard curricular processes. Course proposals will not be approved for more than two General Education designations.

9. Course proposals must explain how the intellectual frameworks and methodologies of the two Knowledge Domains will be explicitly addressed in the course and practiced by the students.

10. Demonstrate that each of the two domains will receive approximately equal attention, providing evidence from course topics, assignments, or other course components, and that students will integrate material from both domains.

11. Include evidence of unit-level (department, program) and College-level administrative approval of the courses, and evidence of substantive consultation
among faculty with expertise in the appropriate Knowledge Domains and discipline(s).

12. Where Inter-Domain courses are cross-listed, consultation with both of those academic units and their Colleges is required. For other Inter-Domain courses, given that all the Knowledge Domains are offered by more than one unit and College, this dual-Domain consultation and support should occur with the most closely related units and Colleges (more than one such unit and College may be relevant).

13. Briefly explain the staffing plan. Given that each Inter-Domain course is approved for two Knowledge Domains, it will be taught by an instructor (or instructional team) with appropriate expertise in both domains. [end delete]

14. [add] Course proposals must [end add] [delete] D [end delete] [add] d [end add] describe the assessments that will be used to determine students’ ability to apply integrative thinking.

193-30 General Principles for Upper-level Integrative Studies Courses

Integrative studies courses may be upper level (300-400) undergraduate level. The basis for determining if a course is eligible for the Integrative Studies designation will be the clear articulation of how the course would help a student achieve the Integrative Thinking learning objective and addressing how student learning in integrative studies will be specifically assessed. Course review will be aided by available rubric to be developed by SCCA.

One-time offering approval for Integrative Studies Course designation may be requested. Normal UFS policies for maximum number of times per title must be followed.
[end add]

Student Facing Policies for Students

Appendix A.1 General Education (Baccalaureate Degree) Policies and Rules for Undergraduate Students

The University Faculty Senate, at its meeting in April 2015, adopted a comprehensive revision of General Education Learning Objectives and requirements. This revision was further detailed in the General Education report adopted by the Senate in March 2016. The First-Year Engagement Program as described was revised April 29, 2008, and Intercultural and International Competence requirements was updated on April 27, 2004). The General Education curriculum will enable students to acquire skills, knowledge, and experiences for living in interconnected contexts, so they can contribute to making life better for others, themselves, and the world. General Education encompasses the breadth of knowledge involving the major intellectual and aesthetic skills and achievements of humanity. This must include understanding and appreciation of the pluralistic nature of knowledge epitomized by the
natural sciences, quantitative skills, social and behavioral sciences, humanities, and arts. To achieve and share such an understanding and appreciation, skills in self-expression, quantitative analysis, information literacy, and collaborative interaction are necessary. General Education aids students in developing intellectual curiosity, a strengthened ability to think, and a deeper sense of aesthetic appreciation. General Education, in essence, aims to cultivate a knowledgeable, informed, literate human being.

An effective General Education curriculum shall facilitate teaching and learning through seven key objectives:

**EFFECTIVE COMMUNICATION** — The ability to exchange information and ideas in oral, written, and visual form in ways that allow for informed and persuasive discourse that builds trust and respect among those engaged in that exchange, and helps create environments where creative ideas and problem-solving flourish.

**KEY LITERACIES** — The ability to identify, interpret, create, communicate, and compute using materials in a variety of media and contexts. Literacy acquired in multiple areas, such as textual, quantitative, information/technology, health, intercultural, historical, aesthetic, linguistic (world languages), and scientific, enables individuals to achieve their goals, to develop their knowledge and potential, to lead healthy and productive lives, and to participate fully in their community and wider society.

**CRITICAL AND ANALYTICAL THINKING** — The habit of mind characterized by comprehensive exploration of issues, ideas, artifacts, and events before accepting or formulating a conclusion. It is the intellectually disciplined process of conceptualizing, applying, analyzing, synthesizing, and/or evaluating information gathered from, or generated by, observation, experience, reflection, reasoning, or communication, as a guide to belief and action.

**INTEGRATIVE THINKING** — The ability to synthesize knowledge across multiple domains, modes of inquiry, historical periods, and perspectives, as well as the ability to identify linkages between existing knowledge and new information. Individuals who engage in integrative thinking are able to transfer knowledge within and beyond their current contexts.

**CREATIVE THINKING** — The capacity to synthesize existing ideas, images, or expertise in original ways and the experience of performing, making, thinking, or acting in an imaginative way that may be characterized by innovation, divergent thinking, and intellectual risk taking.

**GLOBAL LEARNING** — The intellectually disciplined abilities to analyze similarities and differences among cultures; evaluate natural, physical, social, cultural, historical, and economic legacies and hierarchies; and engage as community members and leaders who will continue to deal with the intricacies of an ever-changing world. Individuals should acquire the ability to analyze power; identify and critique interdependent global, regional, and local cultures and systems; and evaluate the implications for people’s lives.

**SOCIAL RESPONSIBILITY AND ETHICAL REASONING** — The ability to assess one’s own values within the social context of problems, recognize ethical issues in a variety of settings, describe how different perspectives might be applied to ethical dilemmas, and consider the ramifications of alternative actions. Individuals should acquire the self-knowledge and leadership skills needed to play a role in creating and maintaining healthy, civil, safe, and thriving communities.

Courses taken to meet General Education program requirements may not be taken under the Satisfactory-Unsatisfactory option.

The baccalaureate degree General Education program consists of 45 credits that are distributed among three General Education components: foundations courses in writing, speaking and
quantification (15 credits), knowledge domains in the Arts, Humanities, Natural Sciences, Social
and Behavioral Sciences, and Health and Wellness (30 credits), and Integrative Studies (6 credits
that overlap with the knowledge domain requirement) that bridges commonality and
intersections between the Knowledge Domains. There are three additional requirements that may
be completed as a part of either General Education courses or courses required in the major.
These requirements, which every baccalaureate degree student must complete, are 3 credits of
United States Cultures, 3 credits of International Cultures, and 3 credits of Writing Across the
Curriculum course work.
In addition, all first-year baccalaureate students are required to complete a First-Year
Engagement (FYE) program designed to actively involve students in learning, acquaint them
with the learning tools and resources available at Penn State, and orient them to the scholarly
community from the outset of their undergraduate studies in a way that will bridge to later
experiences in their chosen majors. A student’s campus of enrollment determines whether or not
he/she is required to complete a First-Year Seminar. Campuses that no longer require an FYS
provide students with a First-Year Engagement experience. All students in a University Park
college or in the Division of Undergraduate Studies at University Park must complete a First-
Year Seminar (FYS) for 1 to 3 credits as part of the FYE program.
Students are advised that the Requirements for the Major of certain baccalaureate degree majors
include courses that have been approved as General Education courses. In those cases, the
appropriate choice of General Education courses will also satisfy the Requirements for the
Major.
Students whose academic majors are in the areas of natural sciences, arts, humanities, and social
and behavioral sciences may not meet the General Education Knowledge Domains components
by taking courses in the department or program identical to that of the academic major. All
General Education courses are to help students explore and integrate information beyond the
special focuses of their majors.
Courses to be Used for General Education
Skills (15 credits)
Writing/Speaking (9 credits)
Courses designated with the GenEd: Writing/Speaking (GWS) attribute satisfy this requirement.
Quantification (6 credits)
Courses designated with the GenEd: Quantification (GQ) attribute satisfy this requirement (3-6
credits are selected from mathematics, applied mathematics, and statistics; 3 credits may be
selected from computer science or symbolic logic).
Knowledge Domains (30 credits)
Health and Wellness (3 credits)
Courses designated with the GenEd: Health Wellness (GHW) attribute satisfy this requirement.
Natural Sciences (9 credits)
Courses designated with the GenEd: Natural Sciences (GN) attribute satisfy this requirement.
Arts (6 credits)
Courses designated with the GenEd: Arts (GA) attribute satisfy this requirement.
Humanities (6 credits)
Courses designated with the GenEd: Humanities (GH) attribute satisfy this requirement.
Social and Behavioral Sciences (6 credits)
Courses designated with the GenEd: Social & Beh Sci (GS) attribute satisfy this requirement.
Integrative Studies (6 credits of either Inter-domain or Linked coursework, these credits overlap with the knowledge domain requirement)

Inter-domain

Courses designated with the GenEd Integrative: Interdomain attribute satisfy this requirement.

Linked

Courses designated with the GenEd Integrative: Linked attribute satisfy this requirement.

The General Education program extends the concept of flexibility to all aspects of the degree program. Penn State wants students to use General Education as an opportunity to experiment and explore, to take academic risks, to discover things they did not know before, and to learn to do things they have not done before. A student may, in consultation with the adviser and the approval of the student’s college dean,

Substitute a 200- to 499-level course in an area of General Education for a course found on the General Education list. For example, a student may take a 400-level course in history and use it to meet the General Education requirement satisfied by a comparable lower-level history course.

Substitute a world language at the twelfth credit level of proficiency, as measured by the Penn State foreign language offerings, for 3 credits in any of the categories of General Education.

Baccalaureate degree students may substitute study in a world/second language at the twelfth credit level of proficiency or higher for any 3 credits in any of the categories of general education only if those 3 credits are in language study beyond their degree requirements.

Substitute a course in one of the Knowledge Domains areas of Arts, Humanities, or Social and Behavioral Sciences, Natural Sciences, or Health and Wellness for a course in one of the other areas. For example, a student might take three courses in the Arts, and only one course in the Social and Behavioral Sciences. In another example, a student might take two courses in the Natural Sciences and two courses in Health and Wellness; or a student might take two courses in the Natural Sciences and three courses in the Humanities. This substitution is referred to as the Move 3 substitution.

The use of these substitutions (No. 2 and No. 3 above), either alone or in combination, may not lead to the complete elimination of any area in the Foundations or Knowledge Domains categories in the student's general education program, nor may they be applied to reduction of credits in the same domain.

NOTE: When a course is used to satisfy more than one requirement, the credits in the course can be counted only once.

General Education courses are identified in the University Course Descriptions and General Education sections of the Undergraduate Degree Programs Bulletin. They can also be found in the Schedule of Courses by the appropriate course designation.

Revised: 12/11/73
Revised: 5/2/18 (based on General Education Planning and Oversight Task Force report 4/28/15)

Appendix A.2 General Education (Associate Degree)
The University Faculty Senate, at its meeting in April 2015, adopted a comprehensive revision of General Education Learning Objectives and requirements. This revision was further detailed in the General Education report adopted by the Senate in March 2016.

The General Education curriculum will enable students to acquire skills, knowledge, and experiences for living in interconnected contexts, so they can contribute to making life better for others, themselves, and the world. General Education encompasses the breadth of knowledge involving the major intellectual and aesthetic skills and achievements of humanity. This must include understanding and appreciation of the pluralistic nature of knowledge epitomized by the natural sciences, quantitative skills, social and behavioral sciences, humanities, and arts. To achieve and share such an understanding and appreciation, skills in self-expression, quantitative analysis, information literacy, and collaborative interaction are necessary. General Education aids students in developing intellectual curiosity, a strengthened ability to think, and a deeper sense of aesthetic appreciation. General Education, in essence, aims to cultivate a knowledgeable, informed, literate human being.

An effective General Education curriculum shall facilitate teaching and learning through seven key objectives:

**EFFECTIVE COMMUNICATION** - The ability to exchange information and ideas in oral, written, and visual form in ways that allow for informed and persuasive discourse that builds trust and respect among those engaged in that exchange, and helps create environments where creative ideas and problem-solving flourish.

**KEY LITERACIES** - The ability to identify, interpret, create, communicate, and compute using materials in a variety of media and contexts. Literacy acquired in multiple areas, such as textual, quantitative, information/technology, health, intercultural, historical, aesthetic, linguistic (world languages), and scientific, enables individuals to achieve their goals, to develop their knowledge and potential, to lead healthy and productive lives, and to participate fully in their community and wider society.

**CRITICAL AND ANALYTICAL THINKING** - The habit of mind characterized by comprehensive exploration of issues, ideas, artifacts, and events before accepting or formulating a conclusion. It is the intellectually disciplined process of conceptualizing, applying, analyzing, synthesizing, and/or evaluating information gathered from, or generated by, observation, experience, reflection, reasoning, or communication, as a guide to belief and action.

**INTEGRATIVE THINKING** - The ability to synthesize knowledge across multiple domains, modes of inquiry, historical periods, and perspectives, as well as the ability to identify linkages between existing knowledge and new information. Individuals who engage in integrative thinking are able to transfer knowledge within and beyond their current contexts.

**CREATIVE THINKING** - The capacity to synthesize existing ideas, images, or expertise in original ways and the experience of performing, making, thinking, or acting in an imaginative way that may be characterized by innovation, divergent thinking, and intellectual risk taking.

**GLOBAL LEARNING** - The intellectually disciplined abilities to analyze similarities and differences among cultures; evaluate natural, physical, social, cultural, historical, and economic legacies and hierarchies; and engage as community members and leaders who will continue to deal with the intricacies of an ever-changing world. Individuals should acquire the ability to analyze power; identify and critique interdependent global, regional, and local cultures and systems; and evaluate the implications for people’s lives.

**SOCIAL RESPONSIBILITY AND ETHICAL REASONING** - The ability to assess one’s own values within the social context of problems, recognize ethical issues in a variety of settings,
describe how different perspectives might be applied to ethical dilemmas, and consider the ramifications of alternative actions. Individuals should acquire the self-knowledge and leadership skills needed to play a role in creating and maintaining healthy, civil, safe, and thriving communities.

Courses taken to meet General Education program requirements may not be taken under the Satisfactory-Unsatisfactory option.

The General Education program for Penn State associate degree students consists of 21 credits distributed among communication and quantification skills (6 credits), the Knowledge Domain areas (15 credits), including courses in the natural sciences (3 credits), arts (3 credits), humanities (3 credits), and social and behavioral sciences (3 credits), and an additional 3 credits in any General Education area (including Health and Wellness (GHW)). Up to six credits of Inter-domain courses may be used for any Knowledge Domain requirement, but when a course is used to satisfy more than one requirement, the credits from the course can be counted only once. Students whose academic majors are in the areas of natural sciences, arts, humanities, and social and behavioral sciences may not meet the General Education Knowledge Domains components by taking courses in the department or program identical to that of the academic major. All General Education courses are to help students explore and integrate information beyond the special focuses of their majors.

Courses to be Used for General Education

Skills (6 credits)

Writing/Speaking (3 credits)
Courses designated with the GenEd: Writing/Speaking (GWS) attribute satisfy this requirement.

Quantification (3 credits)
Courses designated with the GenEd: Quantification (GQ) attribute satisfy this requirement (3 credits are selected from mathematics, applied mathematics, statistics, computer science, or symbolic logic).

Knowledge Domains (15 credits)

Natural Sciences (3 credits)
Courses designated with the GenEd: Natural Sciences (GN) attribute satisfy this requirement.

Arts (3 credits)
Courses designated with the GenEd: Arts (GA) attribute satisfy this requirement.

Humanities (3 credits)
Courses designated with the GenEd: Humanities (GH) attribute satisfy this requirement.

Social and Behavioral Sciences (3 credits)
Courses designated with the GenEd: Social & Beh Sci (GS) attribute satisfy this requirement.

In addition to the above Knowledge Domains course requirements, associate degree students must complete 3 credits in any General Education area. Inter-domain courses (N) may be used for any Knowledge Domain requirement, but when a course is used to satisfy more than one requirement, the credits from the course can be counted only once.

The General Education program extends the concept of flexibility to all aspects of the degree program. Penn State wants students to use General Education as an opportunity to experiment and explore, to take academic risks, to discover things they did not know before, and to learn to do things they have not done before.

To these ends, students may, with the permission of their adviser and dean's representative, substitute a 200- to 499-level course for an Arts, Humanities, Natural Sciences, or Social and Behavioral Sciences course found on the General Education list. For example, a student may take
a 400-level course in history and use it to meet the General Education requirement satisfied by a comparable lower level history course.

General Education courses are identified in the University Course Descriptions and General Education sections of the Undergraduate Degree Programs Bulletin. They can also be found in the Schedule of Courses by the appropriate course designation.

Revised: 5/2/18 (based on General Education Planning and Oversight Task Force report 4/28/15) [END DELETE]
Clean copy of Policies

Curriculum and Undergraduate Instruction Policies

142-00 Baccalaureate Degree Requirements in the General Education Program

The General Education program consists of 45 credits distributed among four components: Foundations (15 credits) in Writing/Speaking and Quantification; Knowledge Domain Breadth (15 credits) in the Natural Sciences, Arts, Humanities, Social and Behavioral Sciences, and Health and Wellness; Integrative Studies (6 credits), through completion of Inter-domain and/or other designated coursework; and Exploration (9 credits) through completion of additional coursework across particular knowledge domains, and/or the study of world language.

Each approved course is identified in the Undergraduate Degree Programs Bulletin and the Course Catalog by descriptive suffixes/attributes as follows:

Foundations (15 credits)

Foundations courses must be completed with a grade of “C” or better. Courses may not be Integrative Studies/Inter-domain.

- WRITING/SPEAKING (9 credits)
  Courses designated with the GWS attribute satisfy this component.
- QUANTIFICATION (6 credits)
  Courses designated with the GQ attribute satisfy this component. (3-6 credits are selected from mathematics, applied mathematics, and statistics; 3 credits may be selected from computer science or symbolic logic.)

Knowledge Domains (15 credits)

Students must complete 3 credits in each Knowledge Domain; courses may not be Integrative Studies/Inter-domain.

- NATURAL SCIENCES (3 credits)
  Courses designated with the GN attribute satisfy this component.
- ARTS (3 credits)
  Courses designated with the GA attribute satisfy this component.
- HUMANITIES (3 credits)
  Courses designated with the GH attribute satisfy this component.
SOCIAL AND BEHAVIORAL SCIENCES (3 credits)
Courses designated with the GS attribute satisfy this component.

HEALTH AND WELLNESS (3 credits)
Courses designated with the GHW attribute satisfy this component.

Integrative Studies (6 credits)

- INTER-DOMAIN
  Courses designated with the General Education- Integrative: Inter-domain attribute satisfy this requirement. (The suffix of N or Q (honors) is commonly used for identification purposes.)

- UPPER-LEVEL
  Courses designated with the General Education- Integrative: Upper-level attribute satisfy this requirement. (The suffix of N or Q (honors) is commonly used for identification purposes.)

Exploration (9 credits)
Select any 9 credits from courses with the GA, GH, GN, GS, or Gen Ed Integrative: Inter-domain attributes and may include 3 credits of World Language course work beyond the 12th credit level or the requirements for the student’s degree program, whichever is higher.

The General Education program extends the concept of flexibility to all aspects of the degree program. Penn State wants students to use General Education as an opportunity to experiment and explore, to take academic risks, to discover things they did not know before, and to learn to do things they have not done before. A student may,

1. Substitute a 200- to 499-level course in an area of General Education for a course found on the General Education list. For example, a student may take a 400-level course in history and use it to meet the General Education requirement satisfied by a comparable lower-level history course.
2. Substitute a world language at the twelfth credit level of proficiency or beyond degree requirements, whichever is higher, for 3 credits in either of the Foundation areas (GWS or GQ) of General Education.

143-10 General Education Statement
Each program may identify courses that may double count between the major and General Education. The courses should satisfy the intention of General Education as well as serve a curricular purpose for the major. The General Education statement should not exceed the number of credits for a General Education domain that exceeds the historically stated requirement for
General Education (i.e., 9 GN credits, 6 GS credits, 6 GA credits, 6 GH credits, 6 GQ credits, 9 GWS credits, 3 GHW credits.) Integrative Studies courses should not be included in the General Education Statement. In exceptional cases (e.g., external accreditation constraints), Curricular Affairs may approve exceptions to this limitation.

143-20 Intentional Breadth in General Education

Students whose academic majors are in the areas of natural sciences, arts, humanities, and social and behavioral sciences may not meet the General Education Knowledge Domains components by taking courses in the department or program identical to that of the academic major. All General Education courses are to help students explore and integrate information beyond the special focuses of their majors. For example, an Economics major may not use an economics course to fulfill his/her social and behavioral sciences requirement. Also, students may not count courses cross-listed with courses in their major to fulfill one of the General Education Knowledge Domain, e.g., a Theatre major may not register for THEA 208/AFAM 208 Workshop: Theatre in Diverse Cultures and have it count in the Arts requirement. This provision does not apply to coursework satisfying the Integrative Studies component. (General Education Planning and Oversight Task Force report 4/28/15)

160-20 General Education Requirements for Associate Degrees

The General Education program for Penn State associate degree students consists of 21 credits distributed among communication and quantification skills (6 credits), the Knowledge Domain areas (15 credits), including courses in the natural sciences (3 credits), arts (3 credits), humanities (3 credits), and social and behavioral sciences (3 credits), and an additional 3 credits in any General Education area, including Health and Wellness (GHW). Up to six credits of Inter-domain courses may be used for any Knowledge Domain requirement, but when a course may be used to satisfy more than one requirement, the credits from the course can be counted only once.

FOUNDATIONS - Build a basis of effective communication and quantitative literacy.
(Integrative Studies: Inter-domain courses may not be used for this requirement.)
Total 6 credits

Requirement: Writing/Speaking (GWS)* – 3 Credits
Requirement: Quantification (GQ)* – 3 Credits
*Requires a grade of C or better

KNOWLEDGE DOMAINS - Practice applying a specific way of constructing knowledge to examine a topic. (Integrative Studies: Inter-domain courses may be used but may only apply to one requirement.)
Total 12 credits

Requirement: Natural Sciences (GN) – 3 Credits
Requirement: Arts (GA) – 3 Credits
Requirement: Humanities (GH) – 3 Credits
Requirement: Social and Behavioral Sciences (GS) – 3 Credits
EXPLORATION - Follow intellectual curiosity to deepen or widen learning
Total 3 credits
In addition to the above Knowledge Domains course requirements, associate degree students must complete 3 credits in any General Education area. Integrative Studies courses may be used for this requirement.

The General Education program extends the concept of flexibility to all aspects of the degree program. Penn State wants students to use General Education as an opportunity to experiment and explore, to take academic risks, to discover things they did not know before, and to learn to do things they have not done before.

To these ends, students may substitute a 200- to 499-level course for an Arts, Humanities, Natural Sciences, or Social and Behavioral Sciences course found on the General Education list. For example, a student may take a 400-level course in history and use it to meet the General Education requirement satisfied by a comparable lower-level history course.

190-10 Criteria for General Education Courses
Criteria for determining whether a course meets the general learning objectives of General Education.

All General Education Course proposals must be responsive to the following prompts:
1. Which of the seven General Education Learning Objective(s) will be addressed in the course? A minimum of two (2) Learning Objective must be clearly addressed in the course; it is recommended that each course address two to three (2-3) Learning Objectives and not more than four (4).
2. What component(s) of the course will help students achieve the General Education Learning Objectives covered in the course? Provide evidence that students in the course have adequate opportunities to achieve the identified Learning Objectives.
3. How will students be assessed to determine their attainment of the Learning Objective(s) of General Education covered in the course? This assessment must be included as a portion of the student’s overall performance in the course.
4. Please provide a copy of the current or proposed syllabus.
5. One-time offering approval for any General Education or Integrative Studies course may be requested. Normal UFS policies for maximum number of times per title must be followed.

192-00 General Education Integrative Studies Criteria
Students must complete 6 credits in Integrative Studies coursework.

192-10 General Principles for the Linked Courses Pathway
4. Linked Courses are interrelated General Education Knowledge Domain courses, each meeting the criteria of its own Knowledge Domain (GA, GH, GHW, GN, or GS), that approach similar subject matter from different intellectual perspectives or are connected in some other purposeful way to provide opportunities for students to experience and practice integrative thinking across Knowledge Domains. Each Linked Course is approved for only one Knowledge Domain and is also part of a Linkage that includes courses from different Knowledge Domains.

5. The student must complete courses that are linked with each other, each in a different General Education Knowledge Domain (thus including at least two Knowledge Domains), for the linked set to fulfill the Integrative Studies requirement. A single course alone does not count for the Linked Courses Pathway in the Integrative Studies requirement even if that course has been approved to be part of a Linkage. However, because each Linked Course satisfies a Knowledge Domain requirement, the student can use it within that Domain (or perhaps elsewhere in the student’s program) whether or not the Linkage is completed. Although, students will usually fulfill the 6-credit Linked Courses Pathway by taking two 3-credit courses in this Pathway students may also use courses carrying anywhere from 1 to 5 credits towards the total of 6 Linked Courses credits.

6. More than two courses may participate in a Linkage; having more than two courses available in a Linkage will provide flexibility and may facilitate students’ abilities to complete the package. Each such course is taught by an instructor, or team of instructors, with appropriate expertise in the course’s Knowledge Domain.

7. Linkages are proposed by faculty (or teams of faculty) with expertise in the relevant disciplines of each Knowledge Domain; proposals will follow the established curricular processes for course approvals.

8. Either single-offering or permanent approval for the Linked Courses designation may be requested. A course may be offered using single-offering approval a maximum of 3 times at a given location.

9. Proposals for Linked Courses will:

   a. Request (or have received) approval as a General Education course in a particular Knowledge Domain, following the standard curricular processes.

   b. Explain how the intellectual frameworks and methodologies of each course’s Knowledge Domain will be explicitly addressed in the course and practiced by the students.

   • Explain how the courses in the Linkage will be linked with each other. It is anticipated that courses will usually be linked by subject matter, but they should additionally be linked by some purposeful component that provides opportunities for students to experience and practice integrative thinking across Knowledge Domains. The Linkage component between courses needs to be intentional and explicit to students. However, each course in a Linkage must be self-contained such that students can successfully complete just one course in the Linkage if they so choose.

   • Include evidence of unit-level (department, program) and College-level administrative approval of the courses and Linkages, and
Appendix I
9/13/22

- Evidence of substantive consultation among faculty with expertise in the appropriate Knowledge Domain(s) and discipline(s).

- Briefly explain the staffing plan. Given that each Linked Course is approved for a single Knowledge Domain, it will be taught by an instructor (or instructional team) with appropriate expertise in that domain, who will also be expected to implement the Linkage’s shared component as defined in the proposal.

- Describe the assessments that will be used to determine students’ ability to apply integrative thinking.

192-20 General Principles for Integrative Studies courses seeking additional General Education designations (Inter-domain courses)

1. Some Integrative Studies courses may integrate, within one course, selected perspectives, concepts, information, and knowledge from one or more General Education area.

2. Each of the General Education areas will receive approximately equal attention (in course topics, assignments, or other course components). Each such course is taught by an instructor, or team of instructors, with appropriate expertise. Courses may be cross-listed or concurrent-listed but this is not required.

3. Courses are proposed by faculty (or teams of faculty) with expertise in the relevant disciplines represented; proposals will follow the established curricular processes for course approvals. Consultation and support from faculty in relevant fields where the course will count is required.

4. Single-offering or permanent approval for the additional Gen Ed designation(s) may be requested. A course may be offered using single-offering approval a maximum of 3 times at a given location.

5. Course proposals will not be approved for more than two General Education designations.

6. Course proposals must explain how the intellectual frameworks and methodologies of the additional areas will be explicitly addressed in the course and practiced by the students.

7. Course proposals must describe the assessments that will be used to determine students’ ability to apply integrative thinking.

193-30 General Principles for Upper-level Integrative Studies Courses

Integrative studies courses may be upper level (300-400) undergraduate level. The basis for determining if a course is eligible for the Integrative Studies designation will be clear articulation of how the course would help a student achieve the Integrative Thinking learning objective and addressing how student learning in integrative studies will be specifically assessed. Course review will be aided by available rubric to be developed by SCCA.

One-time offering approval for Integrative Studies Course designation may be requested. Normal UFS policies for maximum number of times per title must be followed.
Student Facing Policies for Students

Appendix A.1 General Education (Baccalaureate Degree)
Policies and Rules for Undergraduate Students

Delete entire appendix, redundant with 140-00.

Appendix A.2 General Education (Associate Degree)

Delete entire appendix, redundant with 160-20

2021-2022 SENATE COMMITTEE ON CURRICULAR AFFAIRS

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SENATE COMMITTEE ON INTERCOLLEGIATE ATHLETICS

Policy 67-10 Division I – Athletic Competition (University Park)

(Legislative)

Implementation: Upon approval by the Senate (and development of procedures when applicable)

Introduction and Rationale
The requirements specified in this policy are meant to ensure that Penn State varsity student athletes have the necessary time to be successful students given the demands of athletic schedules. While the policy is written to address most specific circumstances, such as allowed practice times and missed class time for competition, there will be situations on occasion where a specific circumstance is not explicitly addressed by this policy. In those circumstances it is the intent of this policy for discretion to be applied with the goal of ensuring that student athletes’ time is protected to allow the best opportunity to achieve academic success.

Recommendation
Three changes were made to Section V. Athletic Schedules with Policy 67-10.
1. Edits in the form of clarifying statements and specific requirements were added as well as redundancies removed.
2. The addition of a new standing sub-committee the Intercollegiate Athletics Committee (IAC) that is authorized to approve the schedule on behalf of the IAC. The subcommittee is comprised of the IAC Chair, IAC Vice Chair, and the University Park Faculty Athletic Representative (FAR).
3. Increase communication by the Intercollegiate Athletics Department (ICA) to IAC Chair in terms of team competition schedule revisions resulting in greater than eight (8) missed class days in the revised schedule. This increased communication is being addressed through the planned correspondence with the newly formed sub-committee noted in point 2.

Revised Policy/Policies (when applicable)
Please note that the following contains bold text for additions and strikeouts for deleted text. In addition, added text is delimited with [Add] [End Add] pairs while deleted text is delimited with [Delete] [End Delete] pairs.

V. Athletic Schedules

A. All schedules of athletic competitions must be submitted to the [Delete] Intercollegiate Athletics Committee through the Faculty Athletic Representative for approval. [End Delete] [Add] standing committee of Faculty Senate – IAC - and the University Park FAR for approval of missed class time by the ICA. [End Add]

[Add] In addition to regular season [Add] [Delete] Competitions [End Delete] [Add] competitions [End Add] that involve varsity teams or individual team members serving as official representatives of the University [Delete] and that are scheduled annually must be approved at the time season schedules are approved by the IA Committee. [ End Delete] [Add], other competitions
that are known of in advance and are scheduled annually must be approved at the time season schedules are approved by the IAC. Example competitions include annual invitational meets, regional conference tournaments, and NCAA regional competitions.

It is the responsibility of the Intercollegiate Athletics Committee to ensure that all intercollegiate athletic competition schedules are within established university regulations and policies.

1. Schedules for all athletic contests scheduled during the fall semester must be submitted to the Faculty Athletic Representative no less than two weeks prior to the regularly scheduled April meeting of the Intercollegiate Athletics Committee.

Athletic teams or individual team members may be absent from the University for no more than eight (8) class days in one semester. For those teams that are submitting a competition schedule that is at or under the 8 class day maximum, a subcommittee of the IAC is authorized to approve the schedule on behalf of the IAC. The subcommittee is comprised of the IAC Chair, IAC Vice Chair, and the University Park FAR. The number of class days missed by each Intercollegiate Athletics team shall be kept on record by the ICA, be formally reported to the FAR, and included annually in the FAR’s report to the IAC. It shall be the joint responsibility of those bodies to enforce these limitations. For purposes of computing missed class time, the following parameters apply (i.e., the same amount of missed class time applies to all student athletes on a team, regardless of individual class schedules, and is based on the day and time when the official team excused absence begins).

- One full class day absence is counted if the official team absence begins prior to 12:00 pm on any day of the week (Monday-Friday).
- One half class day absence is counted if the official team absence begins on a Monday, Wednesday or Friday between 12:00 pm and 2:15 p.m.
- One half class day absence is counted if the official team absence begins on a Tuesday or Thursday between 12:00 pm and 2:50 p.m.
- No absence is counted if the official team absence begins on Monday, Wednesday or Friday after 2:15 p.m.
- No absence is counted if the official team absence begins Tuesday or Thursday after 2:50 p.m.
f. No absence is counted for absences related to Conference or NCAA post-season competitions.  

2. Schedules for all athletic contests scheduled during the spring semester must be submitted to the Faculty Athletic Representative no less than two weeks prior to the regularly scheduled September meeting of the Intercollegiate Athletics Committee. In situations where Conference schedules have not been released by the Conference, that should be clearly made known in the materials submitted to the FAR and IAC, with plans for submitting these schedule details as soon as available.

3. Schedules for all athletic contests scheduled during the spring semester must be submitted to the FAR and IAC no less than two weeks prior to the regularly scheduled September meeting (i.e., September prior to the Spring season in question) of the IAC. In situations where Conference schedules have not been released by the Conference, that should be clearly made known in the materials submitted to the FAR and IAC, with plans for submitting these schedule details as soon as available. Competition schedules should not be announced prior to approval from the IAC. In some circumstances ICA may need to make schedules public before IAC approval; however, approval should be sought by the IAC Chair and the FAR. In addition, when possible, ICA should hold off on making travel arrangements until missed class time is approved.

4. Regular season, non-conference* athletic travel or competition shall not take place during official university final exam periods. Final exam periods should be considered ‘off limits’ except for the most extenuating circumstances in which case a request for deviation must be made. Requests for deviation from this Faculty Senate policy requirement must be brought to the IAC from the ICA after consultation with the University Park FAR.

5. Regular season, non-conference* athletic travel or competition shall not take place on official university study days. Requests for deviation from this Faculty Senate requirement must be brought to the IAC from the ICA after consultation with the FAR. In addition, when possible, ICA should hold off on making travel arrangements until missed class time is approved.

6. Waivers, submitted in writing to the Faculty Athletics Representative requesting approval for non-conference* competitions scheduled on a study day, will be considered by the Intercollegiate Athletics Committee. Waiver requests must be received no less than 15 weeks prior to the anticipated competition and must include: Requests for deviation from the prohibition to compete on a final exam or study day must be submitted in writing to the IAC through the ICA submitted to the IAC Chair.
Competition schedules should not be announced prior to approval from the IAC. In some circumstances ICA may need to make schedules public before IAC approval; however, approval should be sought by the IAC Chair and the FAR. In addition, when possible, the ICA should hold off on making travel arrangements until missed class time is approved. Any such requests for deviation (i.e., waiver requests) should be received, when possible, no less than 15 weeks prior to the anticipated competition and must include: [End Add]

a. full rationale for the need to schedule a competition on a study day, including reasons alternate dates are not possible;
b. actual study day hours occupied for the competition, including preparations, travel, completion, and post competition activities;
c. current team academic performance measures including team cumulative GPA, recent semester GPA, and academic progress rate;
d. team academic progress rate ranking as compared to Big Ten competitors and all Penn State intercollegiate athletics teams;
e. de-identified individual Penn State student athlete cumulative GPA of those student athletes who will participate in the study day competition in question;
f. a specific plan that replaces official university study day hours lost to the competition in question with alternative, supervised study hours;
g. a plan to avoid future competitions on official university study days; and
h. the number of team missed class days scheduled for the semester in question.

7. Where a team competition schedule that has been approved by the Intercollegiate Athletics Committee must be revised due to unforeseen circumstances due to weather, travel, health or safety or other emergent issues, then:
   a. If a team competition schedule revision results in no increase, or a decrease, beyond the approved schedule missed class time, the Faculty Athletics Representative must be notified of the schedule change.
   b. If a team competition schedule revision results in an increase in the missed class days previously approved, but there are fewer than eight (8) missed class days in the revised schedule, the Faculty Athletics Representative must review the schedule change, (FAR) must be notified of the schedule change and record the impact of the change in the annual University Park FAR report to the Intercollegiate Athletics Committee (IAC).
   c. If a team competition schedule revision results in an increase resulting in greater than eight (8) missed class days in the revised schedule, the Faculty Athletics Representative will review the schedule change in collaboration with the Intercollegiate Athletics Committee, or its designated scheduling review subcommittee, and provide a decision. must be notified of the schedule change and also alert the IAC Chair.
   d. The Intercollegiate Athletics Committee must be notified of all team schedule revisions where missed class days exceed eight (8) in a summary report by the Faculty Athletics Representative or Intercollegiate Athletics Committee designated scheduling review subcommittee. The FAR must record the impact of the change in the annual FAR report to the Faculty Senate.
* “Non-conference” means that contest arrangements, including time and date of the competition, are under the control of Penn State University and not the Big Ten, NCAA, USCAA, or other outside [Delete] agency. [End Delete] [Add] governing body. [End Add]

8. Every effort must be made by Intercollegiate Athletics to avoid league (Big Ten, NCAA, etc.) scheduled contests and associated travel on university scheduled final exam days and study days. [Delete] Where league contests are scheduled during official university final exam periods or study days, Intercollegiate Athletics is strongly encouraged to replace official university study day hours lost to the competition in question with alternative, supervised study hours. [End Delete] [Add] The ICA and the FAR must make sure that Conference staff are well informed of Penn State’s 67-00 policy as it relates to the desire to avoid scheduled competitions during final exam periods. Where league contests are scheduled during official university final exam periods or study days, ICA must submit a formal plan to the FAR and IAC about replacing official university study day hours lost to the competition in question with alternative, supervised study hours. [End Add]

B. Where Intercollegiate Athletics competition contracts include, or may include, competitions during official university exam periods or on study days, the competition date(s) must be approved by the Intercollegiate Athletics Committee prior to execution of the contract [Add] ,when possible. [End Add]

[Delete]

C. Athletic teams or individual team members may be absent from the University for no more than eight (8) class days in one semester. The number of class days missed by each Intercollegiate Athletics team shall be

Appendix J 9/13/22
kept on record by the Intercollegiate Athletics Committee and Intercollegiate Athletics. It shall be the joint responsibility of those bodies to enforce these limitations.

1. One full class day absence is counted if student athletes are absent from classes beginning prior to 12:00 pm.
2. One half class day absence is counted if student athletes are absent from Monday, Wednesday or Friday classes beginning between 12:00 pm and 2:15 pm.
3. One half class day absence is counted if student athletes are absent from Tuesday or Thursday classes beginning between 12:00 pm and 2:50 pm.
4. No absence is counted when student-athlete absences begin Monday, Wednesday or Friday after 2:15 pm.
5. No absence is counted when student-athlete absences begin Tuesday or Thursday after 2:50 pm.
6. No absence is counted for absences due to championship competitions.

D. Participation in special events outside approved scheduled events by varsity teams or individual team members (such as football bowl games) must be approved by the IA Committee at least ten days prior to participation. As in all events, NCAA and/or other athletic conference regulations and University regulations will be followed by a sub-committee that includes the IAC Chair, the IAC Vice Chair, and the University Park FAR. Such approval by this sub-committee must be provided at least ten days prior to participation, unless that is not possible given the timing of the event. The IAC Chair should make note of such approval to the IAC and the FAR should include the approval in the annual report to the Faculty Senate.

E.

F. Team practice times must be arranged so as to allow student-athletes flexibility in scheduling and attending classes each semester. Expected team practice times should be made available prior to student-athlete class preferential scheduling for the semester affected—typically February 1 for Fall, and September 1 for Spring. Every effort should be made to adjust team practice times to avoid conflict with student-athlete class schedules.

1. Morning team practices should conclude with sufficient time to allow 3rd period (10:10 a.m. – 11:00 a.m.) class attendance on Monday, Wednesday, and Friday.
2. Morning team practices should conclude with sufficient time to allow 14th period (10:35 a.m. to 11:50 a.m.) class attendance on Tuesday and Thursday.
3. Afternoon team practices should begin sufficient after 6th period concludes (2:15 p.m.) on Monday, Wednesday, and Friday to allow class attendance.

4. Afternoon team practices should begin sufficient after 16th period concludes (2:50 p.m.) on Tuesday and Thursday to allow class attendance.

5. Morning Team practices should not be scheduled during both Fall and Spring semesters.

6. Significant departures from the practice guidelines listed above must be approved by the University Park FAR [Add] at least two weeks before the first date of student athlete priority class registration for the subsequent semester. The University Park FAR will consider and has the authority to approve or deny the request based on the facts and merits of the circumstances. [End Add]. The FAR will provide an annual report of cases where significant departures have occurred and submit for review by IAC.

V. Athletic Schedules

a. All schedules of athletic competitions must be submitted to the standing committee of Faculty Senate - Intercollegiate Athletics Committee (IAC) and the University Park Faculty Athletic Representative (FAR) for approval of missed class time by the Department of Intercollegiate Athletics (ICA).

In addition to regular season competitions that involve varsity teams or individual team members serving as official representatives of the University, other competitions that are known of in advance and are scheduled annually must be approved at the time season schedules are approved by the IAC. Example competitions include annual invitational meets, regional conference tournaments, and NCAA regional competitions.

It is the responsibility of IAC to ensure that all intercollegiate athletic competition schedules are within established university regulations and policies.

b. Athletic teams or individual team members may be absent from the University for no more than eight (8) class days in one semester. For those teams that are submitting a competition schedule that is at or under the 8 class day maximum, a subcommittee of the IAC is authorized to approve the schedule on behalf of the IAC. The subcommittee is comprised of the IAC Chair, IAC Vice Chair, and the University Park FAR. The number of class days missed by each Intercollegiate Athletics team shall be kept on record by the ICA, be formally reported to the FAR, and included annually in the FAR’s report to the IAC. It shall be the joint responsibility of those bodies to enforce
these limitations. For purposes of computing missed class time, the following parameters apply (i.e., the same amount of missed class time applies to all student athletes on a team, regardless of individual class schedules, and is based on the day and time when the official team excused absence begins).

c. One full class day absence is counted if the official team absence begins prior to 12:00 pm on any day of the week (Monday-Friday).

d. One half class day absence is counted if the official team absence begins on a Monday, Wednesday or Friday between 12:00 pm and 2:15 p.m.

e. One half class day absence is counted if the official team absence begins on a Tuesday or Thursday between 12:00 pm and 2:50 p.m.

f. No absence is counted if the official team absence begins on Monday, Wednesday or Friday after 2:15 p.m.

g. No absence is counted if the official team absence begins Tuesday or Thursday after 2:50 p.m.

h. No absence is counted for absences related to Conference or NCAA post-season competitions.

7. Schedules for all athletic contests scheduled during the spring semester must be submitted to the FAR no less than two weeks prior to the regularly scheduled April meeting (i.e., April prior to the fall season in question) of the IAC. In situations where Conference schedules have not been released by the Conference, that should be clearly made known in the materials submitted to the FAR and IAC, with plans for submitting these schedule details as soon as available.

8. Schedules for all athletic contests scheduled during the spring semester must be submitted to the FAR and IAC no less than two weeks prior to the regularly scheduled September meeting (i.e., September prior to the Spring season in question) of the Intercollegiate Athletics Committee (IAC). In situations where Conference schedules have not been released by the Conference, that should be clearly made known in the materials submitted to the FAR and IAC, with plans for submitting these schedule details as soon as available. Competition schedules should not be announced prior to approval from the IAC. In some circumstances ICA may need to make schedules public before IAC approval; however, approval should be sought by the IAC Chair and the FAR. In addition, when possible, ICA should hold off on making travel arrangements until missed class time is approved.

9. Regular season, non-conference* athletic travel or competition shall not take place during official university final exam periods. Final exam periods should be considered ‘off limits’ except for the most extenuating circumstances in which case a request for deviation must be made. Requests for deviation from this Faculty Senate policy requirement must be brought to
the IAC from the ICA after consultation with the University Park FAR.

10. Regular season, non-conference* athletic travel or competition shall not take place on official university study days. Requests for deviation from this Faculty Senate requirement must be brought to the IAC from the ICA after consultation with the FAR. In addition, when possible, ICA should hold off on making travel arrangements until missed class time is approved.

11. Requests for deviation from the prohibition to compete on a final exam or study day must be submitted in writing to the IAC through the ICA submitted to the IAC Chair. Competition schedules should not be announced prior to approval from the IAC. In some circumstances ICA may need to make schedules public before IAC approval; however, approval should be sought by the IAC Chair and the FAR. In addition, when possible, the ICA should hold off on making travel arrangements until missed class time is approved. Any such requests for deviation (i.e., waiver requests) should be received, when possible, no less than 15 weeks prior to the anticipated competition and must include:

   a. full rationale for the need to schedule a competition on a study day,
      including reasons alternate dates are not possible;
b. actual study day hours occupied for the competition, including preparations, travel, completion, and post competition activities;
c. current team academic performance measures including team cumulative GPA, recent semester GPA, and academic progress rate;
d. team academic progress rate ranking as compared to Big Ten competitors and all Penn State intercollegiate athletics teams;
e. de-identified individual Penn State student athlete cumulative GPA of those student athletes who will participate in the study day competition in question;
f. a specific plan that replaces official university study day hours lost to the competition in question with alternative, supervised study hours;
g. a plan to avoid future competitions on official university study days; and 
h. the number of team missed class days scheduled for the semester in question.

12. Where a team competition schedule that has been approved by the IAC must be revised due to unforeseen circumstances due to weather, travel, health or safety or other emergent issues, then:
   a. If a team competition schedule revision results in no increase, or a decrease, beyond the approved schedule missed class time, the FAR must be notified of the schedule change.
   b. If a team competition schedule revision results in an increase in the missed class days previously approved, but there are fewer than eight (8) missed class days in the revised schedule, the FAR must be notified of the schedule change and record the impact of the change in the annual University Park FAR report to the IAC.
   c. If a team competition schedule revision results in an increase resulting in greater than eight (8) missed class days in the revised schedule, the FAR must be notified of the schedule change and also alert the IAC Chair.
   d. [Delete] The IAC must be notified of all team schedule revisions where missed class days exceed eight (8) in a summary report by the FAR or IAC designated scheduling review subcommittee. The FAR must record the impact of the change in the annual FAR report to the Faculty Senate.

* “Non-conference” means that contest arrangements, including time and date of the competition, are under the control of Penn State University and not the Big Ten, NCAA, USCAA, or other outside governing body.

8. Every effort must be made by Intercollegiate Athletics to avoid league (Big Ten, NCAA, etc.) scheduled contests and associated travel on university scheduled final exam days and study days.
The ICA and the FAR must make sure that Conference staff are well informed of Penn State’s 67-00 policy as it relates to the desire to avoid scheduled competitions during final exam periods. Where league contests are scheduled during official university final exam periods or study days, ICA must submit a formal plan to the FAR and IAC about replacing official university study day hours lost to the competition in question with alternative, supervised study hours.

G. Where Intercollegiate Athletics competition contracts include, or may include, competitions during official; university exam periods or on study days, the competition date(s) must be approved by the IAC prior to execution of the contract, when possible.

H. Participation in special events outside approved scheduled events by varsity teams or individual team members a sub-committee that includes IAC Chair, the IAC Vice Chair, and the University Park FAR. Such approval by this sub-committee must be provided at least ten days prior to participation, unless that is not possible given the timing of the event. The IAC Chair should make note of such approval to the IAC and the FAR should include the approval in the annual report to the Faculty Senate.

I. Team practice times must be arranged so as to allow student-athletes flexibility in scheduling and attending classes each semester. Expected team practice times should be made available prior to student-athlete class preferential scheduling for the semester affected – typically February 1 for Fall, and September 1 for Spring. Every effort should be made to adjust team practice times to avoid conflict with student-athlete class schedules.

1. Morning team practices should conclude with sufficient time to allow 3rd period (10:10 a.m. – 11:00 a.m.) class attendance on Monday, Wednesday, and Friday.
2. Morning team practices should conclude with sufficient time to allow 14th period (10:35 a.m. to 11:50 a.m.) class attendance on Tuesday and Thursday.
3. Afternoon team practices should begin sufficient after 6th period concludes (2:15 p.m.) on Monday, Wednesday, and Friday to allow class attendance.
4. Afternoon team practices should begin sufficient after 16th period concludes (2:50 p.m.) on Tuesday and Thursday to allow class attendance.
5. Morning Team practices should not be scheduled during both Fall and Spring semesters.
6. Significant departures from the practice guidelines listed above must be approved by the University Park FAR at least two weeks before the first date of student athlete priority class registration for the subsequent semester. The University Park FAR will consider and has the authority to approve or deny the request based on the facts and merits of the circumstances. The FAR
will provide an annual report of cases where significant departures have occurred and submit for review by IAC.

J. Revised:
5/3/83
Revised:
5/1/84
Revised:
4/28/87
Revised:
1/24/8

K. Revised:
3/16/10
Revised:
4/24/12
Revised:
3/12/13
Revised:
1/26/16
Revised:
4/19/16

2021-2022 SENATE COMMITTEE ON INTERCOLLEGIATE ATHLETICS COMMITTEE (IAC)

- Daniel F. Perkins, Chair
- Terry M. Blakney, Vice Chair
- Jeff Adams, Member (selected by President)
- Lauren C. Cramer, Member
- Dwight Davis, Member
- Julie Fanburg-Smith, Member
- Vikash V. Gayah, Member
- Frank T. Guadagnino, Member (selected by President)
- Meredith H. Handley, Member
- Holden Ingalls, Member
- Binh P. Lee, Member
- Dennis P Scanlon, Member and University Park Faculty Athletics Representative
67-10 Division I – Athletic Competition (University Park). Pertaining to Section V. Athletic Schedules

From (https://senate.psu.edu/policies-and-rules-for-undergraduate-students/67-00-athletic-competition/)

The requirements specified in this policy are meant to ensure that Penn State varsity student athletes have the necessary time to be successful students given the demands of athletic schedules. While the policy is written to address most specific circumstances, such as allowed practice times and missed class time for competition, there will be situations on occasion where a specific circumstance is not explicitly addressed by this policy. In those circumstances it is the intent of this policy for discretion to be applied with the goal of ensuring that student athletes’ time is protected to allow the best opportunity to achieve academic success.

V. Athletic Schedules

A. All schedules of athletic competitions must be submitted to the standing committee of Faculty Senate - Intercollegiate Athletics Committee (IAC) and the University Park Faculty Athletic Representative (FAR) for approval of missed class time by the Department of Intercollegiate Athletics (ICA).

In addition to regular season competitions that involve varsity teams or individual team members serving as official representatives of the University, other competitions that are known of in advance and are scheduled annually must be approved at the time season schedules are approved by the IAC. Example competitions include annual invitational meets, regional conference tournaments, and NCAA regional competitions.

It is the responsibility of the Intercollegiate Athletics Committee (IAC) to ensure that all intercollegiate athletic competition schedules are within established university regulations and policies.

1. Athletic teams or individual team members may be absent from the University for no more than eight (8) class days in one semester. For those teams that are submitting a competition schedule that is at or under the 8 class day maximum, a subcommittee of the IAC is authorized to approved the schedule on behalf of the IAC. The subcommittee is comprised of the IAC Chair, IAC Vice Chair, and the University Park FAR. The number of class days missed by each Intercollegiate Athletics team shall be kept on record by the Intercollegiate Athletics Department (ICA), be formally reported to the FAR, and included annually in the FAR’s report to the Intercollegiate Athletics Committee (IAC). It shall be the joint responsibility of those
bodies to enforce these limitations. For purposes of computing missed class time, the following parameters apply (i.e., the same amount of missed class time applies to all student athletes on a team, regardless of individual class schedules) and is based on the day and time when the official team excused absence begins).

L. One full class day absence is counted if the official team absence begins prior to 12:00 pm on any day of the week (Monday-Friday).
M. One half class day absence is counted if the official team absence begins on a Monday, Wednesday or Friday between 12:00 pm and 2:15 p.m.
N. One half class day absence is counted if the official team absence begins on a Tuesday or Thursday between 12:00 pm and 2:50 p.m.
O. No absence is counted if the official team absence begins on Monday, Wednesday or Friday after 2:15 p.m.
P. No absence is counted if the official team absence begins Tuesday or Thursday after 2:50 p.m.
Q. No absence is counted for absences related to Conference or NCAA post-season competitions.

2. Schedules for all athletic contests scheduled during the fall semester must be submitted to the FAR and IAC no less than two weeks prior to the regularly scheduled April meeting (i.e., April prior to the fall season in question) of the Intercollegiate Athletics Committee (IAC). In situations where Conference schedules have not been released by the Conference, that should be clearly made known in the materials submitted to the FAR and IAC, with plans for submitting these schedule details as soon as available.

3. Schedules for all athletic contests scheduled during the spring semester must be submitted to the FAR and IAC no less than two weeks prior to the regularly scheduled September meeting (i.e., September prior to the Spring season in question) of the Intercollegiate Athletics Committee (IAC). In situations where Conference schedules have not been released by the Conference, that should be clearly made known in the materials submitted to the FAR and IAC, with plans for submitting these schedule details as soon as available. Competition schedules should not be announced prior to approval from the IAC. In some circumstances ICA may need to make schedules public before IAC approval; however, approval should be sought by the IAC Chair and the FAR. In addition, when possible, ICA should hold off on making travel arrangements until missed class time is approved.

4. Regular season, non-conference athletic travel or competition shall not take place during official university final exam periods. Final exam periods should be considered ‘off limits’ except for the most extenuating circumstances in which case a request for deviation must be made. Requests for deviation from this Faculty Senate policy requirement must be brought to the IAC from the Intercollegiate Athletics Department (ICA) after consultation with the University Park Faculty Athletics Representative (FAR).

5. Regular season, non-conference athletic travel or competition shall not take place on official university study days. Requests for deviation from this Faculty Senate requirement must be brought to the Intercollegiate Athletics Committee (IAC) from the Intercollegiate Athletics Department (ICA) after consultation with the FAR. In addition, when possible, ICA should hold off on making travel arrangements until missed class time is approved.

6. Requests for deviation from the prohibition to compete on a final exam or study day must be submitted in writing to the IAC through the IAC Chair. Competition schedules should not be announced prior to approval from the IAC. In some circumstances ICA may need to make schedules public before IAC approval; however, approval should be sought by the IAC Chair and the FAR. In addition, when possible ICA should hold off on making travel arrangements until missed class time is approved. Any such requests for deviation (i.e., waiver requests) should be received, when possible, no less than 15 weeks prior to the anticipated competition and must include:

   a. full rationale for the need to schedule a competition on a study day, including reasons alternate dates are not possible;
   b. actual study day hours occupied for the competition, including preparations, travel, competition, and post competition activities;
   c. current team academic performance measures including team cumulative GPA, recent semester GPA, and academic progress rate (APR);
   d. team academic progress rate (APR) ranking as compared to Big Ten competitors and all Penn State intercollegiate athletics teams;

1 Non-conference” means that contest arrangements, including time and date of the competition, are under the control of Penn State University and not the Big Ten or other conference, NCAA, USCAA, or other outside governing body.
e. de-identified individual Penn State student athlete cumulative GPA of those student athletes who will participate in the study day competition in question;
f. a specific plan that replaces official university study day hours lost to the competition in question with alternative, supervised study hours;
g. a plan to avoid future competitions on official university study days; and
h. the number of team missed class days scheduled for the semester in question.

7. Where a team competition schedule that has been approved by the Intercollegiate Athletics Committee (ICA) must be revised due to unforeseen circumstances due to weather, travel, health or safety or other emergent issues, then:

a. If a team competition schedule revision results in no increase, or a decrease, beyond the approved schedule missed class time, the Faculty Athletics Representative (FAR) must be notified of the schedule change.
b. If a team competition schedule revision results in an increase in the missed class days previously approved, but there are eight (8) or fewer missed class days in the revised schedule, the Faculty Athletics Representative (FAR) must be notified of the schedule change and record the impact of the change in the annual University Park FAR report to the Intercollegiate Athletics Committee (IAC).
c. If a team competition schedule revision results in an increase resulting in greater than eight (8) missed class days in the revised schedule, the Faculty Athletics Representative must be notified of the schedule change and also alert the Intercollegiate Athletics Committee Chair. The FAR must record the impact of the change in the annual FAR report to the Faculty Senate.

8. Every effort must be made by Intercollegiate Athletics to avoid league (Big Ten, NCAA, etc.) scheduled contests and associated travel on university scheduled final exam days and study days. The Intercollegiate Athletics Department (ICA) and the FAR must make sure that Conference staff are well informed of Penn State’s 67-00 policy as it relates to the desire to avoid scheduled competitions during final exam periods. Where league contests are scheduled during official university final exam periods or study days, Intercollegiate Athletics Department (ICA) must submit a formal plan to the FAR and Intercollegiate Athletics Committee (IAC) about replacing official university study day hours lost to the competition in question with alternative, supervised study hours.

B. Where Intercollegiate Athletics competition contracts include, or may include, competitions during official university exam periods or on study days, the competition date(s) should be approved by the Intercollegiate Athletics Committee (ICA) prior to execution of the contract, when possible.

C. Participation in special events outside approved scheduled events by varsity teams or individual team members (e.g., football bowl games) must be approved by a sub-committee that includes the Intercollegiate Athletics Committee (IAC) Chair, the IAC Vice Chair, and the University Park Faculty Athletics Representative. Such approval by this sub-committee must be provided at least ten days prior to participation, unless that is not possible given the timing of the event. The IAC Chair should make note of such approval to the Intercollegiate Athletics Committee (IAC) and the FAR should include the approval in the annual report to the Faculty Senate.

D. Team practice times must be arranged so as to allow student-athletes flexibility in scheduling and attending classes each semester. Expected team practice times should be made available prior to student-athlete class preferential scheduling for the semester affected – typically February 1 for Fall, and September 1 for Spring. Every effort should be made to adjust team practice times to avoid conflict with student-athlete class schedules.

1. Morning team practices should conclude with sufficient time to allow 3rd period (10:10 a.m. – 11:00 a.m.) class attendance on Monday, Wednesday, and Friday.
2. Morning team practices should conclude with sufficient time to allow 14th period (10:35 a.m. to 11:50 a.m.) class attendance on Tuesday and Thursday.
3. Afternoon team practices should begin sufficiently after 6th period concludes (2:15 p.m.) on Monday, Wednesday, and Friday to allow class attendance.
4. Afternoon team practices should begin sufficiently after 16th period concludes (2:50 p.m.) on Tuesday and Thursday to allow class attendance.
5. Morning Team practices should not be scheduled for the same team during both Fall and Spring semesters.
6. Significant departures from the practice guidelines listed above must be requested of the University Park Faculty Athletics Representative at least two weeks before the first date of student athlete priority class
registration for the subsequent semester. The University Park Faculty Athletics Representative will consider and has the authority to approve or deny the request based on the facts and merits of the circumstances. The Faculty Athletics Representative will provide an annual report of cases where significant departures have occurred and submit for review by Intercollegiate Athletics Committee.

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Revised: 5/1/84
Revised: 4/28/87
Revised: 1/24/89
Revised: 3/16/10
Revised: 4/24/12
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Revised: 1/26/16
Revised: 4/19/16

Revised: 2/28/22
SENATE COMMITTEES ON FACULTY AFFAIRS AND INTRA-UNIVERSITY RELATIONS

Revisions to AC22: Search Procedures for Academic Administrative Positions (Formerly HR22)

(Advisory/Consultative)

Implementation: Upon Approval by the President

Introduction

AC22 “Search Procedures for Academic Administrative Positions (Formerly HR22)” was last revised in 2006. Sixteen years later, the policy no longer effectively guides or accurately reflects hiring practices at Penn State. In particular, AC22 does not provide guidance to academic units about how to conduct faculty searches that attend to issues of diversity, equity, and inclusion.

Consultative process leading to this report

The recommendations to revise AC22 to make it consistent with the changes made to AC13, Procedure for Hiring Full-time Faculty, were proposed in 2019. The process to revise AC22, as shown below, reflects a multi-year consultative effort, led by the Vice Provost for Faculty Affairs (VPFA) and the Associate Vice President for Affirmative Action (AVPAA), involving numerous members of the University Faculty Senate, and dating back to the Fall of 2018. This consultative process resulted in feedback addressing a wide range of topics, including, but not limited to, search committee composition and size, duration of posting, responsibilities of the search committee, confidentiality, and attention to issues of diversity, equity, and inclusion. The process of consultation included:

- **Spring 2019:** The VPFA and the AVPAA shared an early draft of the proposed policy with the Academic Leadership Council (ALC) and Senate leadership for feedback.
- **Fall 2019:** The VPFA and the AVPAA revised the draft policy based on feedback they received and then circulated the new draft to ALP for feedback.
- **Winter 2022:** After further revising the proposed policy again consistent with the revisions made to AC13 in March of 2019, the VPFA and the AVPAA shared the new draft with the chair of the University Faculty Senate’s Committee on Faculty Affairs, and the Faculty Affairs and Intra-University Relations Committee.

Rationale for proposed revisions

The proposed revisions embody several general principles, all of which are consistent with the revision to AC13. First, they align policy AC22 with Penn State’s current practices and strategic goals, especially in relation to diversity, equity, and inclusion. Second, they add specificity. For example, the proposed revisions provide important guidance on search committee composition related to various positions and appointment types, as well as emphasizing diverse representation in other critical areas. The proposed revisions also explicitly detail the responsibilities of search committee members, the committee chair, and the appointing authority, making it clear that these responsibilities include being held accountable for creating a candidate pool that reflects candidates who are qualified for the position and for implementing recruitment strategies that result in an appropriately diverse candidate pool. Third, the proposed revisions reflect changes in administrative processes at Penn State, for example, through clarifying and
standardizing expectations regarding confidentiality, the posting of job announcements, and the locus of decision-making authority.

Recommendation

The committees recommend that AC22 (“Search Procedures for Academic Administrative Positions (Formerly HR22)”)

Please note that the following contains bold text for additions. Added text is notated with [Add] [End Add]. Please note that the following contains strikethrough text for deletions. Deleted text is notated with [Delete] [End Delete].

AC22 Search Procedures for Academic Administrative Positions (Formerly HR22)

Policy Status: Active
Policy Steward: Vice Provost for Faculty Affairs

POLICY’S INITIAL DATE: May 12, 1961

THIS VERSION EFFECTIVE: February 3, 2006

- Purpose
- General
- Responsibility
- Guidelines

PURPOSE:

To [delete] state University policy concerning the search process for filling vacancies in academic administrative positions [end delete] outline responsibilities for the process of hiring academic administrators.

GENERAL:

It is the policy of the University to [delete] insure [end delete] [add] ensure [end add] the appropriate involvement of the faculty and professional staff in the search process for filling academic administrative vacancies at the department, college, campus, Interdisciplinary and Defense-Related Research Units, and central administrative levels of the University, and to [delete] encourage [end delete] [add] ensure [end add] the application of affirmative action guidelines to all major phases of this process.

[delete] a. [end delete] [add] 1. [end add] University units seeking to fill academic administrative positions should [delete] give consideration to [end delete] [add] review [end add] their respective affirmative action [delete] goals [end delete] [add] plan data to determine areas of underutilization [end add] [delete] as outlined on their most current Affirmative Action Audit Report [end delete]. This is particularly important for those units that [delete] historically [end delete] have [add] historically [end add] had significant under
representation of [add] members of specific groups [end add] [delete] women and/or minorities in their staffing [end delete]. [add] Attention should also be paid to advancing employment opportunities for members of other underrepresented groups within their unit. [end add]

[delete] b [end delete] [add] 2. [end add] National advertising is required [delete] on [end delete] [add] for [end add] all [delete] standing [end delete] [add] no term [end add] academic administrative positions. Exceptions to this policy [delete] may [end delete] [add] must [end add] be approved by the Executive Vice President and Provost in consultation with the [add] Associate Vice President for [end add] Affirmative Action [delete] Officer [end delete].

[delete] In such instances, however, the unit must provide equal promotional opportunity to women and minorities, documented by advertising the vacancy in the Intercom and considering fairly all applicants internal to the University. Additional efforts should be made to encourage Penn State women and minorities to apply. Exceptions will not be granted for the following positions: academic dean, campus chancellor, academic vice presidents, and the Executive Vice President and Provost [end delete].

[add] a. Exceptions will not be granted for the following positions: academic dean, campus chancellor, academic vice presidents, academic vice provosts, and the Executive Vice President and Provost. [end add]

RESPONSIBILITY:
The next highest administrative office will [add] serve as the appointing authority and [end add] be responsible for appointing [delete] advisory [end delete] search committees [add] and making the final decision about the hire [end add].

GUIDELINES:
The following general guidelines will apply [add] to nationally and internally advertised searches [end add]:

[delete] 1. Advisory search committees will participate in the various phases of the search.

2. The majority of faculty members on an advisory search committee will be members of the academic unit within which leadership is sought.

In the case of Interdisciplinary and Defense-Related Research Units, the academic unit embraces those colleges and departments in which faculty in Interdisciplinary and Defense-Related Research Units hold joint appointments. Exceptions to this guideline require that the appointing authority obtain written approval from the next higher level of administrative authority.

a. Advisory search committees, whenever possible, will include women and members of minority groups. When women and minorities are not represented on a search committee, written documentation explaining the lack of representation of each group shall be included in the search file available for review.

b. Advisory search committees, whenever possible, will include representation from all locations within the unit.
3. The method of nominating faculty members to advisory search committees will be determined by procedures agreed upon by the faculty and the academic unit’s academic administrator who is immediately above the position for which the search committee is formed.

4. The list of faculty nominations for advisory search committees will not exceed twice the number of faculty members to be appointed by the appointing authority.

5. The appointing authority will designate as chair one of the faculty members of the committee who comes from the academic unit within which leadership is sought. Exceptions to this guideline require that the appointing authority obtain written approval from the next higher level of administrative authority.

6. Faculty members from other academic units, administrators and students will be included on advisory search committees as appropriate.

7. The general charge to advisory search committees will be to identify qualified candidates. The appointing authority will provide specific charges as appropriate within the framework of this general charge applicable to all advisory search committees.
   a. Advisory search committees will report on efforts undertaken to locate women and minority applicants.
   b. Application deadlines should be at least 30 days from the date the vacancy is first publicized.

8. Advisory search committees will participate in the determination of candidates to be interviewed and in the interviewing of those candidates.

9. Prior to the final selection, advisory search committees will present their evaluations and recommendations of candidates to the appointing authority. At the request of either the committee or the appointing authority, a meeting to discuss recommendations will be held.

10. When academic administrative positions are to be filled by internal processes, the following special guidelines apply:
   a. Advertising: position announcements should be placed in the Penn State Newswire and should be posted in the unit having the vacancy. The application deadline should be at least 30 days from its appearance in the Penn State Newswire.
   b. Promotions provide upward mobility for qualified current employees. As long as consideration is given to all qualified employees including women, minorities, handicapped persons, and veterans, if any, promotions will not conflict with equitable, affirmative employment practices.
   c. When an appointing authority utilizes the internal search method, a preappointment report will be provided to the Affirmative Action Office with the following information:
      1. Copy of position description.
      2. Resume of selected employee.
      3. Resumes of other employees who were considered for promotion.
      4. Reason for selection of proposed employee.
5. Affirmative action efforts made or considered.

6. d. At the discretion of the appointing authority, an advisory search committee may or may not be appointed for internal promotions. If an advisory search committee is not used, the form of faculty consultation to be used must be specified in the internal request for approval to use internal search processes. Faculty consultation will include matters noted in the guidelines numbered 2, 7, 8, and 9.

7. e. No employee may be transferred (or promoted) from a Non-Tenure Line Appointment to a Tenure-Line Appointment without going through an affirmative action search unless the person selected on the Non-Tenure Line Appointment was chosen after a national search. [end delete]

[add]

1. A search committee consisting of a minimum of five (5) members is required for all academic administrative positions; any exceptions to this minimum must be approved by the appointing authority.

2. Search committees will participate in the various phases of the search.

3. The majority of the faculty members on a search committee will be members of the academic unit or those who hold joint appointments within the academic unit.
   a. All search committees should represent a broad range of diversity among their members, which includes members of underrepresented groups. If such representation is unable to be obtained within the unit, committee members should be solicited from related units. When such diversity is not represented on a search committee, documentation explaining the lack of representation shall be included in the search record available for review (see the accompanying guidelines for details).
   b. Search committees, whenever possible, will include representation across the unit.

4. The academic unit leader will appoint search committee members and designate one member as the committee chair.

5. Faculty members from other academic units, administrators, and students will be included on search committees as appropriate.

6. The general charge to search committees will be to identify qualified candidates. The appointing authority will provide specific guidelines as appropriate within the framework of this general charge applicable to all search committees.
   a. The charge will include a review of Affirmative Action guidelines that must be adhered to.
   b. Application deadlines should be at least 30 days from the date the vacancy is first publicized.
   c. The efforts to recruit a diverse pool of candidates must reflect the efforts of the full committee. Units should not place the responsibility to diversify the pool specifically on members of the search committee who are from underrepresented groups.
d. Search committee chairs will document and report on the search committee’s efforts undertaken to recruit applicants who are members of underrepresented groups.

e. The search committee will also document and report on the committee’s assessment of the strengths of, and concerns about, each candidate recommended for an on-site interview. If either the pool or the list of candidates recommended for an on-site interview is not viewed as either sufficiently diverse or qualified by the appointing authority, the appointing authority may request that the committee recruit and/or review additional candidates or close the search.

f. The search committee will submit names of candidates it would like to invite for on-site interviews to the appointing authority before such invitations are issued. The appointing authority may request that the search committee provide a ranking of the candidates it has recommended for an on-site interview. The appointing authority approves candidates for on-site interviews from the list of candidates recommended by the search committee. If, however, the appointing authority is not satisfied with the candidate pool, the appointing authority may make the decision to close the search.

g. After the on-site interview process has concluded, the appointing authority will select a finalist for the position from the candidates interviewed for the position. If a finalist is not or cannot be selected, the appointing authority may decide to close the search or ask the committee members to return to the candidate pool in search of qualified candidates recommended for an on-site interview.

h. All search committee members will maintain confidentiality and the integrity of the process by discussing candidates and deliberating only with other search committee members and appropriate administrators/faculty/staff. Such confidentiality will be maintained throughout the search and into the future.

7. All internal searches must be approved by the Office of the Executive Vice President and Provost in consultation with the Affirmative Action Office. The following general guidelines will apply to internal searches if they have been approved:

a. The unit must provide equal promotional opportunity to members of underrepresented groups, documented by advertising the vacancy with an application deadline at least 30 days from the date the vacancy is first publicized and by fairly considering all qualified applicants internal to the University.

b. Additional proactive efforts are expected to be implemented and documented to encourage internal potential candidates who are members of underrepresented groups to apply.

c. Promotions provide upward mobility for qualified current employees. As long as consideration is given to all qualified employees including members of underrepresented groups, promotions will not conflict with equitable, affirmative employment practices.
d. When an appointing authority utilizes the internal search method, prior to an offer being made, an Internal Recruitment report will be provided to the Affirmative Action Office with the following information:
   i. Copy of position descriptions
   ii. Curriculum Vitae of selected employee
   iii. Curriculum Vitae of other employees who were considered for promotion
   iv. Reason for selection of successful candidate
   v. Affirmative Action recruitment efforts implemented or considered

e. In the event of an internal search, a search committee is still required and will be charged with screening candidates and presenting their evaluations and recommendations of internal candidates to the appointing authority for further consideration. Exceptions to this process must be approved by the Office of the Executive Vice President and Provost.

8. All employee transfers must be approved by the Office of the Executive Vice President and Provost. Only employees who were hired via a national search process are eligible to be transferred or promoted into an academic administrative position. [end add]

The above general guidelines apply in all [add] national and internal [end add] search processes for academic administrative positions such as, but not limited to,

[add] academic dean, associate dean, assistant dean
academic vice president, associate vice president, assistant vice president
academic institute director
campus chancellor
campus director of academic affairs [end add]
department head,
division head,
[add] executive vice president and provost
vice provost, associate vice provost, assistant vice provost [end add]
[delete] program head,
academic institute director,
assistant dean,
associate dean,
It is the responsibility of the appointing authority or their designee to notify a successful candidate in writing of the offer of employment.

In the case of central administrative academic officers, the search committee will be appointed by the President of the University with faculty membership being representative of the total University as nominated by the appropriate Senate mechanism.

As set forth in Section 5.09(a)(iv)(1) of the University’s Bylaws, in the selection of a President, the Board shall consult with representatives of the faculty and the student body.

AC22 Search Procedures for Academic Administrative Positions (Formerly HR22)

Policy Status:
Active

Policy Steward:
Vice Provost for Faculty Affairs

POLICY’S INITIAL DATE: May 12, 1961

THIS VERSION EFFECTIVE: XXX, XXXX DRAFT DATE 1.6.20

- Purpose
- General
- Responsibility
- Guidelines

PURPOSE:

To outline responsibilities for the process of hiring academic administrators.

GENERAL:
It is the policy of the University to ensure the appropriate involvement of the faculty and professional staff in the search process for filling academic administrative vacancies at the department, college, campus, interdisciplinary and defense-related research units, and central administrative levels of the University, and to ensure the application of affirmative action guidelines to all major phases of this process.

1. University units seeking to fill academic administrative positions should review their respective affirmative action plan data to determine areas of underutilization. This is particularly important for those units that have historically had significant underrepresentation of members from specific groups. Attention should also be paid to advancing employment opportunities for members of other underrepresented groups within their unit.

2. National advertising is required for all no term academic administrative positions. Exceptions to this policy must be approved by the Executive Vice President and Provost in consultation with the Associate Vice President for Affirmative Action.

   a. Exceptions will not be granted for the following positions: academic dean, campus chancellor, academic vice presidents, academic vice provosts, and the Executive Vice President and Provost.

RESPONSIBILITY:

The next highest administrative office will serve as the appointing authority and be responsible for appointing search committees and making the final decision about the hire.

GUIDELINES:

The following general guidelines will apply to nationally and internally advertised searches.

1. A search committee consisting of a minimum of five (5) members is required for all academic administrative positions; any exceptions to this minimum must be approved by the appointing authority.

2. Search committees will participate in the various phases of the search.

3. The majority of the faculty members on a search committee will be members of the academic unit or those who hold joint appointments within the academic unit.
   a. All search committees should represent a broad range of diversity among their members, which includes members of underrepresented groups. If such representation is unable to be obtained within the unit, committee members should be solicited from related units. When such diversity is not represented on a search committee, documentation explaining the lack of representation shall be included in the search record available for review (see the accompanying guidelines for details).
   b. Search committees, whenever possible, will include representation across the unit.

4. The academic unit leader will appoint search committee members and designate one member as the committee chair.
5. Faculty members from other academic units, administrators, and students will be included on search committees as appropriate.

6. The general charge to search committees will be to identify qualified candidates. The appointing authority will provide specific guidelines as appropriate within the framework of this general charge applicable to all search committees.
   a. The charge will include a review of Affirmative Action guidelines that must be adhered to.
   b. Application deadlines should be at least 30 days from the date the vacancy is first publicized.
   c. The efforts to recruit a diverse pool of candidates must reflect the efforts of the full committee. Units should not place the responsibility to diversify the pool specifically on members of the search committee who are from underrepresented groups.
   d. Search committee chairs will document and report on the search committee’s efforts undertaken to recruit applicants who are members of underrepresented groups.
   e. The search committee will also document and report on the committee’s assessment of the strengths of and concerns about each candidate recommended for an onsite interview. If either the pool or the list of candidates recommended for an onsite interview is not viewed as either sufficiently diverse or qualified by the appointing authority, the appointing authority may request that the committee recruit and or review additional candidates or close the search.
   f. The search committee will submit names of candidates it would like to invite for onsite interviews to the appointing authority before such invitations are issued. The appointing authority may request that the search committee provide a ranking of the candidates it has recommended for an onsite interview. The appointing authority approves candidates for onsite interviews from the list of candidates recommended by the search committee. If, however, the appointing authority is not satisfied with the candidate pool, the appointing authority may make the decision to close the search.
   g. After the onsite interview process has concluded, the appointing authority will select a finalist for the position from the candidates interviewed for the position. If a finalist is not or cannot be selected, the appointing authority may decide to close the search or ask the search committee members to return to the candidate pool in search of qualified candidates recommended for an onsite interview.
   h. All search committee members will maintain confidentiality and the integrity of the process by discussing candidates and deliberating with only other search committee members and appropriate administrators/faculty/staff. Such confidentiality will be maintained throughout the search and into the future.

7. All internal searches must be approved by the Office of the Executive Vice President and Provost in consultation with the Affirmative Action Office. The following general guidelines will apply to internal searches if they have been approved:
a. The unit must provide equal promotional opportunity to members of underrepresented groups, documented by advertising the vacancy with an application deadline at least 30 days from the date the vacancy is first publicized and by fairly considering all qualified applicants internal to the University.

b. Additional proactive efforts are expected to be implemented and documented to encourage internal potential candidates who are members of underrepresented groups to apply.

c. Promotions provide upward mobility for qualified current employees. As long as consideration is given to all qualified employees including members of underrepresented groups, promotions will not conflict with equitable, affirmative employment practices.

d. When an appointing authority utilizes the internal search method, prior to an offer being made, an Internal Recruitment report will be provided to the Affirmative Action Office with the following information:
   i. Copy of position description
   ii. Curriculum Vitae of selected employee
   iii. Curriculum Vitae of other employees who were considered for promotion.
   iv. Reason for selection of successful candidate.
   v. Affirmative Action recruitment efforts implemented or considered.

e. In the event of an internal search, a search committee is still required and will be charged with screening candidates and presenting their evaluations and recommendations of internal candidates to the appointing authority for further consideration. Exceptions to this process must be approved by the Office of the Executive Vice President and Provost.

All employee transfers must be approved by the Office of the Executive Vice President and Provost. Only employees who were hired via a national search process are eligible to be transferred or promoted into an academic administrative position.

The above general guidelines apply in all national and internal search processes for academic administrative positions such as, but not limited to,

academic dean, associate dean, assistant dean,

academic vice president, associate vice president, assistant vice president,

academic institute director,

campus chancellor,

campus director of academic affairs,

department head,

division head,
executive vice president and provost, vice provost, associate vice provost, assistant vice provost

It is the responsibility of the appointing authority or their designee to notify a successful candidate in writing of the offer of employment.

In the case of central administrative academic officers, the search committee will be appointed by the President of the University with faculty membership being representative of the total University as nominated by the appropriate Senate mechanism.

In accord with Section 101.03 of the Rules of the Board of Trustees for Governance of the University, in selection of a President, the Board shall consult with representatives of the faculty and the student body.

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SENATE COUNCIL

Report on Fall 2021 Academic Unit Visits

(Informational)

Background/Introduction

The Faculty Senate has several mandated reports to communicate important activities carried out throughout the year. This report is the mandated report for the purpose of providing the information to the Senate on the Academic Unit visits that occurred in the Fall of 2021.

The Senate Officers visited seven academic units in Fall 2021: Great Valley (September 7, 2021), DuBois (September 23, 2021), New Kensington (September 27, 2021), Greater Allegheny (September 28, 2021), Brandywine (September 30, 2021), Harrisburg (October 1, 2021), Abington (October 18, 2021). During these visits, the Senate Officers met with staff, students, faculty, and administrators. Each group met separately to encourage open and honest discussions*.

As a reference, three visits were conducted in-person (New Kensington, Greater Allegheny, and Harrisburg) with the remaining four being virtual (Great Valley, DuBois, Brandywine, and Abington).

Executive Summary

Each academic unit varied in their enrollment, their academic programs, and the nature of their student populations. They did however share common “hot topics” concerning the units and the University.

Many of these topics were also voiced during the Fall 2020 and Spring 2021 academic unit visits (University Faculty Senate Agenda – April 26, 2022, Appendix W and V, https://senate.psu.edu/senators/agendas-records/april-26-2022-agenda/)

“Hot Topics”

- Overall Response to COVID-19
  - Vaccination status, testing sites, etc.
  - Flexibility of returning to campus/working remotely
- Communication
  - New policies
  - COVID-19 information
- Workload
  - Short-staffed units/departments lead to more work being put onto those still working
- Fear of Retaliation
  - Lack of support from those in higher positions
o Focus on overall image rather than student/faculty/staff welfare

- Lack of Morale
  o Lack of recognition from those in higher positions

Unit Summaries
In addition to the overall themes shared above, unique information was learned from each academic unit. Below is a unit-by-unit summary. A careful reading will illustrate the unique attributes and successes of our academic units, as well as the important issues they are confronting. It is our hope that this information will ultimately reveal pathways for improvement.

Great Valley
(September 7, 2021; Attendance per meeting group – staff 19, faculty 13, students 6)

The staff meeting began with positives being shared of the response to COVID-19. It was shared that the unit has been able to find solutions in a timely manner with growing communication across campuses. Special praise was given to Information Technologies for their helpful manner and availability while being remote. This was achieved via Teams and Zoom. Staff stated that workload is better now compared to the last several semesters, but did share concern of how they will be able to handle the possibility of returning to the higher level of demands while being short-staffed. Staff shared additional concerns over being short-staffed. Those that remain admitted they are “hopeless and scared.” It was discussed that some staff individuals wanted to continue remote working conditions, but left their positions when that was no longer an option. Currently, staff are working three days on campus and two days remotely with some flexibility. Staff voiced that it would be good to have options for individuals, especially those who have proven their ability to work remotely. There is a need for more flexibility in remote work, considering they are competing regionally, nationally, and internationally. Staff want to retain talent.

The faculty meeting was also filled with very compassionate conversations. Faculty expressed many concerns regarding vaccinations, including the safety of students and faculty in the classrooms together. As of this meeting the faculty stated, 94+% of faculty and 64% of students are vaccinated. Faculty stated that there are still unanswered questions on what happens if faculty, staff, students, etc. test positive. Faculty expressed concern for more robust contact tracing. Faculty also stated that they would like to know what is happening with the students instead of waiting to know after the fact. Faculty expressed need for a plan and flexibility to help those that need to isolate. Isolation is supposed to happen for ten days, but the academic terms are only seven weeks long. Faculty expressed concern that there is no extra time to give to students who are supposed to be graduating. Faculty noted that most professors do not lecture, engagement and experimental learning are the primary mechanisms of learning in their classrooms. Classroom recordings may not completely work in this setting. Faculty mentioned that there needs to be greater flexibility in teaching methods in order to best help the students who may be sick or in quarantine. Thus far, faculty has received rules on what not to do, but they would like more rules on what they can do. An example: If a student is in isolation, they are able to attend remotely, but is that allowed? Faculty firmly stated that they want to be teaching in the classroom with the students, but discretion is needed. They wish to have various channels of
communication in order to help students who have families, travel for conferences, etc. Faculty are worried that they are starting to second-guess their good judgements, which has been a consequence to using other teaching methods. Up to 25% of faculty present agreed that there is a climate of fear of not complying with the perceived lack of discretion. Faculty shared that the University has been “heavy-handed” to the point of minimizing discretion. An example given by the faculty: against the judgement of weather services during Storm Ida, many teachers and students still had to go to campus and participate in classes. Faculty stated that there is a climate of “you have to be in person,” which is clouding judgements. Faculty understand and appreciate that some students want to be in the classroom, but they also want what is in the best interest of all students, staff, and faculty, and wish there was more flexibility and trust of faculty judgements. Faculty shared concern that emphasis on compliance, rules, penalties, and reporting to name a few, has begun to take precedence over how to reward faculty and to do what is best for the students. Faculty have not received any direct threats, but the climate of “you have to comply” makes them question every day actions – Am I violating policy? Am I in trouble? The faculty stated a wish for more support and flexibility “from the top.” Faculty stated that decisions regarding mode of teaching seem to be separated from the faculty; they used to have some input, but this year the information has been disregarded and some faculty seem to not be told what format they are teaching in until they find out on LionPath. Faculty have had the option to teach hybrid in the past (50%/50%), but now they say this does not seem like an available option. Faculty stated this information was not communicated in a way that faculty would know this, considering they were told during follow-ups that “decisions were not made yet.” Regarding the narratives for faculty yearly reviews, many faculty said the narrative doesn’t matter considering they don’t have any input into the class format. As for research, faculty were very thankful in the unit’s support of faculty research through student workers/research assistants, conference fees, and requested resources. Faculty would like a basic yearly guideline on how they can use resources, and more guidelines and information on different research plans.

This group was solely international students, who stated make up 70-80% of the campus full time students, expressed disappointment with Penn State’s communication and resources. Students stated that 75% of classes they were taking were online, a fact that was not properly communicated before they arrived. Students were disappointed in the fact that they had not visited the campus prior to arrive and had to “do everything on their own.” They also mentioned the lack of an international student organization, an international point of contact, and on-campus housing. Students also expressed disappointment in transportation; they feel transportation is not student-friendly due to transportation running only a few times a day and nothing Friday-Sunday. They would prefer a shuttle every two hours, intercollege transportation (i.e. to UP), a mode of transportation between campus and the train station, and a discount on the transportation. Students also stated that there are not enough events happening on campus. Regarding food on campus, students expressed concern that there are not fresh food options available and that food prices were too high. They had no complaints about the professors or academics.

During the administrative meeting, they addressed staff concerns of remote vs. face-to-face instruction and decided to revisit this issue after the Fall 2021 semester. Administration is also looking for guidance to see what centrally located resources have been working and which have not. Examples being: Human Resources, Information Technology, and Instructional Design departments. When discussing faculty concerns/comments, the administration stated that
Appendix L
9/13/22

guidelines have changed, and they are looking into student demographics. Administration also stated that faculty can use Zoom and classroom recordings if it is easier, but ask that faculty not say, “the rest of the term we are going to do this on Zoom.”

DuBois
(September 23, 2021; Attendance per meeting group – staff 21, students 14, faculty 17)

Staff began with praise for the unit’s response to COVID-19. They stated that the unit has adapted very well, they have a very good team of collaborators, and Admissions and Student Affairs have been doing “wonderful work.” Staff expressed that they were grateful for the flexibility during COVID-19, but the flexibility needs to be fair across the board. Many staff have been struggling with daycare or have lost loved ones. Staff mentioned that Dr. McBride had put into place many great things before his retirement that they would like to continue with those ideas and practices. An example being: general campus meetings in a common area, “wonderful communication,” thoroughly keeping everyone up to date, and “keeping us a team.” In regard to extra work, staff admitted it can be, and has been, overwhelming when figuring out what needs to be done and what is required of them while prioritizing what needs to be done on a daily basis. Staff expressed concern that the extra work has been overwhelming with responsibility overloads. The stress on staff has also increased as they try to help students as much as possible while staying positive and keeping them fully enrolled and engaged. Staff recognize that this is a small unit with a small staff, but admitted they feel under-resourced and understaffed. They were concerned that there were few people to coordinate and execute plans, and things were starting to “fall off the plate.” Staff expressed that most of the onboarding of human resources reverts to staff on campus. Examples being: paperwork of position openings that need to go to human resources, human resource staff attending meetings that other staff are not, learning new procedures and processes of new systems like SIMBA. Staff expressed gratitude for university-wide collaboration during COVID-19. They noted that the decision to work remotely was innovative and created a connectiveness with others. Staff believe they are working smarter and efficiently toward a One Penn State. Staff enjoyed their ability to access health and meditation programs. They also praised enriching college experiences with students especially students with different skill sets. Staff mentioned it was nice for students to take other classes and it was nice to see campuses sharing and collaborating their courses. Staff did, however, express that they have seen a decrease in the collaboration efforts and benefits this year as we move back to in person activities.

The student meeting began with praises for the campus. Students specifically praised the Student Engagement Office, faculty, and academic advisors. Students felt the Student Engagement Office was very nice and wanted students to get involved. Students also thought the Student Engagement Office had many things to offer, including Leader Quest, Club Fair, Student Union activities, bingo, etc. Students thought the Student Engagement Office is doing a much better job compared to last year (2020-2021). Students thought faculty were a little watered-down last year, but this year faculty are very engaged and interactive. Students shared that academic advisors were “wonderful at projecting the rest of our college experiences” and provided extra opportunities to gain the experience needed for different majors. Students did express concern regarding the low rate of COVID-19 vaccinations and would like to try to increase those numbers. On the same note, students did express uneasiness in certain aspects of COVID-19
protocols on campus, specifically close proximity outside of buildings without masks, and the fact that dual enrollment students seem to not wear their masks correctly. The students did share the location of vaccination and testing centers in the area (Walmart, churches, Penn Highlands, mailed tests, etc.). It was discussed that campus should have a clinic. Students would like to see more opportunities to stay more than two years at DuBois (secondary education, wildlife, nursing, etc.) due to the fact that they loved the opportunities, professors, smaller campus, and connectivity at DuBois. Some students stated they have settled with certain majors just because they want to stay on campus. Students would like to see Masters programs and more third- and fourth-year students.

Faculty expressed concern that the schedule regarding pay raises is disconnected to evaluations. Senate explained this disconnection is because of the approval of the budget through the Board of Trustees. Faculty stated that the lack of clarity on teaching options is making their jobs more difficult. Faculty expressed concern that the option to use Zoom a portion of class days has not been extended, and they worry that the University is “killing the autonomy.” Based on this faculty question how they determine what course content is and how it extends into policy. Faculty feel as though the University does not trust them and it feels like punishment. Faculty also expressed concern that they feel as if they are supposed to act like the pandemic is over. Faculty also expressed concern of the dual role of the Chancellor and Academic Affairs; faculty do not believe the dual role is working and believe it is hurting the campus in programming, faculty, and enrollment. Faculty shared that the lack of job description, release time and managerial power of the Program Coordinator positions is of concern; faculty also stated that these issues continuously get pushed to the back and are not dealt with in a timely manner. Faculty praised the work of Dr. McBride before his retirement, especially his commitment to communication and connectivity throughout the campus, and plan to continue this through weekly town hall meetings. Faculty said they would like to see more research focus. They also expressed concern over less professional development funds for teaching faculty. There are also issues in distribution of labor. Faculty shared that the unit is set to get its own four-year IT program and have one four-year engineering major. Faculty have also noticed students staying on campus because they enjoy it so much.

New Kensington
(September 27, 2021; Attendance per meeting group – staff 17, students 18, faculty 13)

Staff noticed many students did not want to do the 2+2 academic plan and leave the area, but wanted to stay. However, staff also noted a lack of housing options and limited majors for student athletes who want the ability to participate in sports for four years. Staff mentioned that are well prepared when they do move on. This is due to the smaller campus size, “they are used to a little bit of hand holding” that New Kensington has been able to provide. Staff expressed concern over being short staffed in Student Life, Registrar’s Office, tech services and maintenance supervisors, and are worried about recruiting. Staff said schedules used to be flexible and they didn’t mind working weekends or evenings, but are now schedules are set at 9am-5pm and worry that evenings and weekends will still be expected. Staff shared that they have lost some individuals due to reductions in hybrid work conditions. Staff were concerned that Staff Senate did not have the same power, respect, and impact as they should, and felt as though it was an after-thought. Staff claimed there was not as much sharing of information and
the separation between Faculty and Staff Senates was not conducive to good communication and conversations. Staff wished for a more connected listserv option as well as biweekly staff and faculty meetings. In regards to first-year seminars, as part of a pilot engagement plan staff will teach PSU 8.

Students expressed concern regarding courses, especially the fact that business courses do not transfer due to them being taught by non-accredited staff. Students also stated that they are told “Penn State is Penn State,” but they do not feel this is accurate. Students said they loved the campus, but feel that it does not prepare them for graduate school, and instead focusses on “pushing you through”. They would like more focus on application of the course material. Specifically, students wished for application-based options and a way to prepare for transitioning into the workforce. Students expressed concern of the fact that some required courses are not offered on campus and that shared courses do not always work, although criminal justice seems to be good between the three campuses. Students shared that they feel academic advisors are very helpful after students declare a major, but before they do so, not as much. Students feel that if they don’t have a clear path in mind, they are in trouble when it comes to advising help. Students think specific path advisors would be helpful, and praised Career Services for their internship opportunities and job information. Students wished for a peer-mentoring-style student ambassador program, and more content-oriented clubs within all departments. They also would like more help for out-of-state students while learning the area. Students expressed concern that housing options, some thought the options were expensive, but all thought they were poor in quality and offered basic resources. Students said they noticed faculty inconsistencies in IST, and student government has been disbanded. However, when student government was in operation they were not good on governance issues, the fact that New Kensington is a commuter campus did not help. Students ended the meeting by saying student engagement is good, but with many students commuting to campus, having heavy credit loads, and working, they do not have the time to participate in events.

Faculty began the meeting expressing concerns about hiring. Some departments are small which makes it very difficult when someone leaves. They stated that the adjunct market has dried up and when one person leaves it is hard to fill the gap. Faculty mentioned they are constantly on hiring committees. Workloads are higher and the feeling of burnout and being stretched too thin is very prevalent. Faculty stated that some shared programs do seem to be working (advising, courses, department meetings). Faculty however shared concern that some shared programs do not work as well. They stated that some of their programs cannot grow, and therefore do not work. The blame for the stagnant growth was placed on University Park wanting to control numbers. Faculty also shared concern that overall, students are not coming into the university prepared. Faculty said there is an ability to communicate across all campuses for issues such as support for advocacy and discipline coordinators but although administration is supportive, some things are out of their reach. Faculty shared that it has been hard to get students out of the “Zoom mentality,” and notice many students are missing classes. Faculty wish to have flexibility over their curriculum delivery. Faculty gave praise to the Director of Academic Affairs (DAA) for being supportive, promoting a friendly environment, and linking the campus to the local area. Faculty stated research has been active, but with no release time. If coming in with established research, faculty need to bring in resources and funding themselves. Also regarding research, faculty shared that funding does not always allow for participation in conferences. Faculty stated
that teaching lines do not provide a bargaining unit. Faculty also stated that the updated biology lab has an inequitable distribution of resources, and shared that the students “sometimes feel that they are at a different university.” Faculty stated that it has been hard to build community since most opportunities are off campus.

**Greater Allegheny**
(September 28, 2021; Attendance per meeting group – staff ~6, students 0, faculty ~6)

* There was a question regarding the conduct of these meetings at this unit. Having explained the importance of providing an open and uncensured environment in which the staff, students and faculty meet in discrete sections, all without administrative presence, the chancellor disagreed with that philosophy and refused to leave the meeting room.

Due to administrator refusal to leave the room during the staff meeting and continued administrator disagreement with meeting protocols, staff were thanked by Senate Officers for coming and the meeting was ended.

Administrator was sitting outside the meeting room during the faculty meeting.

Faculty expressed concern regarding COVID-19 due to masks not being worn correctly and vaccination numbers not being where faculty would like them. Faculty also did not like consistently asking students to get tested and are apprehensive about being on campus. They wish the University took a more aggressive approach concerning being on campus, and are concerned over the lack of psychological support. Faculty have noticed a lack of student preparedness after returning to campus; Canvas crisis, not taking notes in class, and not testing for placement (i.e., having students who shouldn’t be in the class yet). Faculty shared that the campus was good at recruiting students for sports but felt that for many students the sports were more important to than the education. Faculty have been trying to help struggling students but feel that “many of these students will disappear.” Faculty agree that there is a lack of acknowledgement on what they are required to do to help first-year students. Faculty feel that there was a “total disconnect” with students last year, which has slightly continued to this year. Faculty representation at the biweekly Monday Huddle was recently added. Faculty stated that representation is greatly appreciated but they question the overall effectiveness of the meetings. Faculty agreed that recruitment needs to “ramp up” and catch up to where it was before COVID-19. Faculty feel the need for advocates for their programs and for student aid with financial resources and math prep. Faculty stated that overall, faculty seems isolated with many people not getting along, being oblivious, not being interested, not having the time, and dealing with location problems. Group functions will hopefully come back after COVID-19, which faculty hope will help these issues. Teaching-line faculty would like to have the ability to take sabbaticals. Teaching-line faculty feel they are asked to do more and more research but state there is no vehicle or mode to help with this. Faculty express concern for newly hired tenure-line individuals that are tasked with starting programs. Those faculty can quickly get burnt out from being the face and advocate for programs while conducting research to gain tenure. Faculty shared that they “could get some really good stuff done if we are given time.” Faculty gave great praise for the iPad program and hope to keep the program indefinitely.
There was only one administer that was in the administration summary meeting. It is unknown if others were invited.

Brandywine
(September 30, 2021; Attendance per meeting – students 19, staff 26, faculty 33)

The student meeting began with students sharing that they have been very busy this year with everything “going well” with clubs and student organizations. They listed such events as Homecoming, Prom, and Thon. The focus with student clubs and organizations is to bring everyone together and increased involvement. They highlighted the Multi-Cultural Club and their efforts including events that spotlight different groups and cultures, religious, racial and disability diversity at one of the most diverse campuses “if not the most diverse.” Regarding faculty and staff, students felt very supported and state that communication is most important. Students said faculty and staff were very helpful during COVID-19; giving extensions for assignments, being very kind and flexible, giving extra notes for exams, providing extended office hours, tutor time, and additional resources. Students said faculty and staff were willing to listen to student needs and point them in the direction of the person who could provide the most help in each situation. Students shared that faculty advisors were also very helpful in directing them to multiple resources and proactively worked with students. Students thought the closeness of resources to the campus were very nice. Students included going into the “city” and multiple places for student to find full and part time jobs. The shared that some commuter students chose to stay on campus their first year due to resources like the study rooms that provided “mini community” settings where “nobody judges.” Students did express a need for more de-stressing outlets, like a movie theater or a lake/pond for more wildlife.

Staff shared that they feel overwhelmed and feel they are “drowning” in areas such as logistics, new protocols, Simba and infrastructure. Staff felt that normal, routine tasks now felt like “sit and wait” tasks and that there isn’t enough time in the day to meet needs, especially with new tasks brought on by COVID-19. Staff shared that they are short-staffed, and filling empty positions takes quite a while, if they are filled at all. Staff worry that someone has to absorb the work that is not being done due to empty positions. Staff also worry that budgets are based on enrollment thus salary structures “do not necessarily take into account the cost of living in the local area.” They also stated that the promotional structure has changed, and individuals are stuck within salary bands. Staff stated that there is currently a freeze on hiring and promotions. Staff shared the stressors of communications and what is being shared globally considering formalized and informalized communication and collaboration has been lost. Staff is missing the collaboration and social aspect of past campus culture. Staff shared that they do not feel valued or supported by the leadership and miss staff awards and seeing their colleagues get recognition for their efforts. Staff feel that “at times [they] are not a united front” and do not receive enough support. Staff discussed changes in leadership and expressed that they have some concerns with a new Chancellor, Director of Academic Affairs, and Director of Student Affairs plus the lasting effects of the pandemic. Staff expressed that monthly staff forums would be very helpful to understand the overall direction of the University and the campus as well as a location to feel that staff feedback is important. Staff wish to meet all together instead of being siloed in separate departments. They also suggested a review of approval processes at both the University
level and the campus level since protocols and processes seem to be rapidly changing. The Staff Advisory Council is brand new, but there has been low participation in signing up. This organization may help bring a collective voice to the staff. Staff ended with the fact that they love the students and the diversity on campus.

Faculty began their meeting with serious issues concerning morale. Faculty stated that there is a “very palpable” fear of retaliation, and they should not be afraid to speak up about their conditions. Faculty stated this fear began before the pandemic, and feel they are not valued. They shared that the campus culture previous to this administration was “quirky dysfunction” but has now blossomed to “harmful dysfunction.” Faculty shared that DEI issues are not being addressed. New faculty hirings, advertising and recruitment, and professional development workshops were topics of interest. Faculty also expressed concern that the Commission on Racial and Ethnic Justice recommendations have not been addressed, and there is still a strong concern of racism on the campus. They state that equity and inclusion have been written into the strategic plan but that cannot be a catch all on these issues. Faculty also felt that the campus valued appearance over safety, especially with the response to COVID-19, contact tracing, and regular testing. Safety was mentioned when inadequacies in building issues arose as well. Faculty stated that shared governance is not valued on their campus. They feel demoralized and stated that some voices (including tenured, white, and male) are valued more than others. Faculty also felt that, even though they have asked for specific things, they have overall been brushed aside. Faculty shared concern about a lack of funding for research development and there has been a “drastic cut” in professional development activities and funding. Faculty brought up the low participation in the annual review of administration, which they feel speaks to the larger culture of fear and retaliation. Faculty shared that there is no transparency about the campus budget and feel “things have not been clear”. Any presentations or information has not been meaningful. Faculty felt that there seems to be a problem with power and control, and felt as though there is no trust in individuals’ abilities to do their jobs. The perception is that the administration is superficially solving problems before they really understand the situations. Faculty expressed concern of the inability to pay competitive wages for part-time faculty and the lack of ability to use grant money. Faculty shared that the budget has been reduced by 6% and funding has been hard to acquire. Faculty expressed concern over the faculty stress level and how that may influence the students. They also worried about the availability of resources to students, especially undergraduate research resources.

Harrisburg
(October 1, 2021; Attendance per meeting – staff 50, faculty 21, students 17)

Staff began their meeting expressing concerns over staff turnover and the worry that more staff exits are coming. Staff stated that their workloads have greatly increased, with many search committees adding more work. Staff shared that it has been difficult finding someone to fill part-time positions and feel that they do not have support from their management, stating they have been told they can “find another job.” Staff shared that in one department, there are 18 open positions. Staff also shared that it is more advantageous to leave Penn State and come back, considering “HR is only willing to increase pay by up to 10% if someone is presented with a competing offer.” Staff shared that many people enjoyed the flexibility of working from home, and those that have all online students should have the option to work remotely. Staff also shared
that the administration on campus was a heavy influence on why some individuals have left. They stated that it seems as if administrators are rarely on campus. The feeling of inequity of the staff having to be there while the administrators do not perpetuate lower morale issues. Staff also expressed concern of new hires being brought on at higher rates, which prompts inequity issues. Staff felt that there was a lack of communication on all levels and siloed behaviors on both local and university levels. Staff expressed that administration is combative when individuals bring up issues, which leads to less fighting for staff rights. Staff felt as though Staff Council has not been effective or helpful. Staff feel that administrative staff have workloads and work lives that are very different than others however they are all treated the same, and the differences are not recognized or addressed. Staff shared that the argument of “if you don’t like it, leave” is pushing many individuals to leave or consider leaving. Staff shared concern with faculty being stretched thin with advising. Staff also shared that restructuring has a negative effect on staff and faculty, they do not feel human resources is accessible to them, and they feel as though there is no bridge between administrators and staff.

Faculty expressed concern over faculty turnover, pay issues, and lack of flexibility. Faculty worry about retaining staff, especially their “wonderful” staff assistants. Faculty shared they do not feel empowered and see large morale issues. Faculty feel they are not valued on what they are doing, regardless of the extra workload most have taken on (it was estimated an additional 1.5-3 hours of work were added to most faculty schedules). Faculty stated that many skilled administrative people have been switching to the medical center and wonder why there is a disparity of pay. Faculty are also concerned that key faculty members are not replaced after leaving, which causes impactful programs to be closed. Regarding One University 2025, faculty shared their concerns for assessment of the curriculum which may lead to problems for assurance of learning: ex. no control over rigor and material, students taking courses in other locations and coming unprepared for the next course, and sharing resources. Faculty questioned what impact what impact this might have in the promotion process. Faculty shared that staff have been reaching out to faculty because they think faculty have more power. Faculty also shared that there has been an increased need for student counselling, with meetings being booked two weeks out. Faculty felt as though the campus is going through “growing pains,” with multiple locations where things are “disintegrating” and losing focus in the money vs. human factors, and expressed the need for meetings between staff, faculty, and leadership. Regarding research, faculty shared that research is expected at a higher level, but they don’t have the graduate students to facilitate such a change. Faculty ask the question of where the research resources are located to function at that level. Faculty expressed the need for an Associate Dean of Research. Faculty felt as though there is a focus on the campus for qualitative research, but the expertise of faculty is ignored. Faculty felt that the strategic plan focuses on topics outside of social sciences and moves faculty away from their role as educators. Faculty expressed concern at the lack of graduate student resources, graduate assistantships, and financial/tuition support. Faculty stated that graduate students are told to raise/find money for their own equipment. Faculty felt as though there should be a change in how the campus talks about resources on a cultural level, and suggested that those in higher positions should work to be more approachable, visible, accessible, and transparent. They feel this would decrease the fear of retaliation when honest conversations are needed.

Based on all the information above faculty felt the administrative survey was viewed as invalid due to “disgruntled” faculty. Committees were not able to view the data because of this
reasoning. Faculty also voiced concerns about the wish to explore adding other majors, but are wary that there had been no indication that they will get teaching lines to support them.

The student meeting began with a discussion about food insecurity. Students expressed the need for more volunteers, an expansion of the food pantry, and a need to destigmatize food pantry use. Students also feel that food is unnecessarily wasted due to the food pantry’s online platform. Students shared that the food pantry has partnered with Sharp Shopper for meats and produce. Students expressed a need for open educational resources, especially for textbooks. Students felt that financial resources are not shared equally, especially for LGBT students and the food pantry. Students shared that there is more pressure to attend classes post-COVID-19 than before, and students would prefer the grades be based on performance, not on attendance. Students shared that finding their advisors is sometimes difficult, with most advisors being remote or focusing more on graduate students. Students expressed concern over lack of resources, and asked for a “what to do if your professor is not doing their job” part of orientation. Students also expressed concern over safety on campus; students stated that the majority of the blue light safety poles are currently out of order, and there are no security cameras in buildings and parking lots. Students have also heard that Police Services is understaffed, which causes more concern. Students stated they have seen Police Services patrolling Nittany Place more often than on campus. International students are especially nervous about safety. One student shared that they have heard other students saying “Speak English” to other minority students. This worries students that this type of language is tolerated on campus. International and minority students feel underrepresented and not heard, and the Veterans lab has been and is still currently closed. Students ended their meeting by sharing concerns regarding skateboards on campus; they shared that citations have been given for simply holding a skateboard and suggested a registration system to have a skateboard on campus (i.e. skate at your own risk and follow the rules or be penalized).

Abington
(October 18, 2021; Attendance per meeting – staff 30, students 6, faculty 17)

Staff began their meeting with concerns about vaccinations; they shared that the amount of extra work put on individuals/offices has been “tremendous” and a “huge burden” to verify vaccinations for students. Staff also shared concern over space on campus, especially in the time of COVID-19 where extra space is needed. Staff asked for regular meetings and updates with as much information as possible. Staff feel well-represented, but there is pressure and anxiety behind the scenes, and staff would like more brainstorming on new policy implementation with individuals involved. Staff wished for more resources for students with barriers. Staff shared concerns regarding high staff turnover in certain offices and the higher workload put on those who are still there. They stated that not only does this affect staff but also students and faculty.

Students wished for Penn State to be the first to include holidays such as Yom Kippur on the list of University days off. Students wished for others to work with their student government on their respective campuses to make this happen. This would make the University more inclusive and a key leader in such issues. Regarding SRTEs, students agree that they are helpful for faculty and for next year’s students, and wish to keep them anonymous. They also would like to have a mid-semester survey to help current students in the course. Students stated that Rate My Professor is
very influential. Students wish for diversity, equity, and inclusion (DEI) efforts to be promoted more on campus.

Faculty expressed concern that not all information (particularly pertaining to vaccination status and COVID-19) was not disseminated to all campuses at the same time. Faculty felt abandoned by University Park based on vaccination clinics and testing sites and that students were not being treated fairly. Faculty shared that they do not feel content at Abington for the first time. Faculty also shared that they do not know what to do with these feelings or where/to whom they should present them. Faculty said they believe some of the COVID-19 government money should have gone to some of the campuses. Faculty shared that there was a lot of “invisible work” being conducted behind the scenes by the faculty which has led to unrecognized workload. Regarding communication, faculty shared that they feel when asking questions, they receive a political answer or no answer at all, and they wish for administrative decisions to be discussed with faculty. Faculty clarified that they understand things are frustrating and are moving very quickly as of late, but they wish for broader communication and transparency when possible. Faculty feel very unconnected, but did share that Zoom has been helpful to increase more individual participations. Regarding senators, faculty felt as though Abington University Faculty Senators do not communicate directly with their faculty, except with a brief comment during local faculty senate monthly meetings, and wish for a list of faculty each senator represents.

Prepared by:
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Background/Introduction

The Faculty Senate has several mandated reports to communicate important activities carried out throughout the year. This report is the mandated report for the purpose of providing the information to the Senate on the Academic Unit visits that occurred in the Spring of 2022.

The Senate Officers visited five academic units in Spring 2022: Eberly College of Science (February 1, 2022), College of Liberal Arts (March 1, 2022), Bellisario College of Communication (March 24, 2022), Ross and Carol Nese College of Nursing (April 19, 2022), College of Health and Human Development (April 21, 2022). During these visits, the Senate Officers met with staff, students, faculty, and administrators*. Each group met separately to encourage open and honest discussions.

As a reference, two visits were conducted in a hybrid format (Eberly College of Science and College of Liberal Arts) with the remaining three conducted on Zoom only (Bellisario College of Communication, Ross and Carol Nese College of Nursing, and College of Health and Human Development).

Executive Summary

Each academic unit varied in their enrollment, their academic programs, and the nature of their student populations. They did however share common “hot topics” concerning the units and the University.

Many of these topics were also voiced during the Fall 2020, Spring 2021, and Fall 2022 academic unit visits (2020-2021 academic unit visits: University Faculty Senate Agenda – April 26, 2022, Appendix W and V, https://senate.psu.edu/senators/agendas-records/april-26-2022-agenda/)

“Hot Topics”

- Overall Response to COVID-19
  - Flexibility of returning to campus/working remotely
- Centralization of Human Resources and Informational Technologies
- Communication
  - New policies and protocols
- Workload
  - Short-staffed units/departments lead to more work being put onto those still working
- Fear of Retaliation


- Lack of support from those in higher positions
- Focus on overall image rather than student/faculty/staff welfare
- Lack of Morale
  - Lack of recognition from those in higher positions

**Unit Summaries**

In addition to the overall themes shared above, unique information was learned from each academic unit. Below is a unit-by-unit summary. A careful reading will illustrate the unique attributes and successes of our academic units, as well as the important issues they are confronting. It is our hope that this information will ultimately reveal pathways for improvement.

**Eberly College of Science**

(February 1, 2022; Attendance per meeting group – staff 56 online/4 in person, students 8 online/0 in person, faculty 11 online/3 in person)

The staff meeting began with issues of morale. Staff are tired, feel unappreciated and treated like “second class citizens”. Staff stated they have proven that they can successfully complete their work remotely and want to retain that flexibility in the workplace. Staff are worried about hiring and state the process is challenging. Some of the challenges listed were: difficult onboarding, variations between colleges, and the new human resource system. Staff feel they need to be human resource professionals with more responsibilities falling on their shoulders and nowhere to ask questions without feeling like “you are being scolded”. Other hiring challenges voiced were below market salaries, no pathway for promotion, constant turnover, and staff cuts when the college has to “give money back to the University”. The staff stated that the line of communication is broken within the College, the College is known for its lack of communication, and acknowledge that this a common trend across the University. However, they have seen other college communication information packaged more efficiently. Staff stated that instead of receiving information from the top down much comes from rumors, an issue that dates back to pre-COVID. In Fall 2021 the Projects Subcommittee of the College Climate and Diversity Committee surveyed staff in the Eberly College of Science. “The motivation for this survey was concern for staff wellbeing and morale.” 148 out of 250 staff members responded to the survey but numerous staff stated they “approached the survey with fear” of retaliation. However, many of the issues listed above can be found in the 2021 ECoS Climate and Diversity Committee Staff Survey Summary. Staff discussed issues with Starfish. They wanted to stress the importance of documenting conversations not only for faculty but students as well. They stated that the lack of documentation is a University wide issue but needs to start at the college level. Staff ended the meeting discussing issues with information access and permissions. They stated that University information is being stored in several places, is very hard to locate, and either the systems do not communicate with one another (courses reviews), or the ability has not been granted (Canvas and Starfish). SIMBA and Workday were listed as well with staff stating that they are not given permissions to complete simple tasks within the systems or the ability to see the progression of issues.
The students began the discussion with concerns about graduate student diversity and gaps in PhD completion rates. Students stated that the burden to create a diverse graduate student population and community in STEM is placed on minority students. When choosing Penn State, the students mentioned mentorship opportunities and program offerings shown online were appealing. During recruiting visits students felt like Penn State “rolls out the red carpet” with individuals services, collaboration, a STEM open house, and seeing the community in one space. Looking back some students feel that is not the reality. Students stated that difference in perspectives can lead to issues in retention. Financial security is an issue as professors try to acquire grants and advocates for PhD students are needed. Students state that mentorship and collaboration opportunities have to be sought either from other students or individuals outside of the University. Students stated that younger students that were in the program have not continued in the program during and since COVID. Graduate students would like a more formal framework for graduate student mental health and state the need for a separation of support between personal and professional lives. Students state that the University is “extremely disjointed” in their resources, protocols, and policies across units and departments. This leads to a lack of cohesion which students say creates time and energy deficits while ultimately deterring students from asking for help. The students ended by stating that the multicultural leader is the only constant. The students expressed the need to have a graduate student lounge, maybe in Kern, since there is no current space known for the graduate students to commune.

The faculty began by listing inequities for visiting scholars. Those positions are paid by an external funding agency thus there are problems in the onboarding process through Human Resources. Faculty stated that this leads to a lack of University orientation and access to Penn State accounts. Visiting scholars thus have a harder time ordering materials, accessing Microsoft Teams, being added to email lists as well as receiving an affiliate identification card instead of a staff identification card. Faculty stated that the burden of administrative systems keeps people from doing their jobs. The first administrative system mentioned was SIMBA. Faculty stated that there is no accurate accounting for their budgets. Budget reports are sent but individuals are “expected to read these reports like accountants”. Faculty expressed the need for transparency in the process. Faculty state Workday is problematic as well. They see Workday as nonintuitive, not taking faculty/user perspectives in mind, and not designed for hiring graduate students on a semester basis. Faculty also have to learn programs such as Onedrive, Canvas, and Sharepoint the “hard way” which adds to system fatigue. Other areas of fatigue are faculty increased workload including “COVID absence letters” that do not include course and section numbers (problematic for individuals teaching multiple large courses) and areas in which faculty are not formally trained. The areas listed were student accommodations, disabilities, recordings or additional classroom materials, mental health, and academic integrity. Faculty thought the University as a whole is not invested in teaching the value of academic integrity and increased training for students and faculty is needed. Faculty ended the meeting with the request to know the budget model for the College.

College of Liberal Arts
(March 1, 2022; Attendance per meeting group – staff 35 online/3 in person, students 16 online/5 in person, faculty 21 online/5 in person)
Staff began by stating they are “constantly amazed by the people they work with and the students”. Staff state that they meet twice a year for all staff meetings. They state there are professional development opportunities, question and answer sessions, and a well-developed staff advisory committee. They stated that the College was in “good hands” but would like to have better communication since many things are transpiring within the College. The staff stated that enrollment growth, fundraising, alumni contributions, increased research, and commitment to students are moving the forward. Under commitment to students, staff listed such items as increased support for graduate studies, student endowments, the Chaiken Center for Student Success, and Paterno Fellows that help the College reach a broad range of students. They state there are still improvements to be made to support students in the middle of the spectrum as well as students who come to the College in their sophomore and junior years. The staff did voice concerns about workload and centralization of resources. They state that positions are not being filled, either they cannot fill the positions, or they are being asked to not fill the positions because of budgets. Some issues are salary freezes, salary bands that are listed in position advertisements (“upper band is a false expectation, and it is hardly ever offered”), a better working environment in other units, and red tape when applying to the University to name a few. Staff state that this is harmful to the University. Not only is the University becoming noncompetitive for quality candidates, but the processes leave current employees feeling slighted and disvalued. The staff feel they are being asked to do “more with a clear sense of less” without being compensated. Staff also state that the 8 am – 5 pm workday is antiquated and does not match student needs and activities. As for centralization of resources, Human Resources and Informational Technology were discussed. Staff stated centralization is so extreme that now there is a disconnect.

The students stated they were “enjoying the experience so far”. They said the curriculum is “great” and the professors are “experienced and wonderful”. Students did express a need for adult learner reintegration including introductory/reintroduction courses, information on how to “learn and study”, plus other items support items that go “beyond advisors and office hours”. Students would also like to see expansions in World Campus offerings and stated the few that are offered tend to repeat semester after semester. Students then transitioned into communication issues. They stated a lack of communication from the College on issues such as the Oliver Baker case led to frustration, feelings of students being ignored, and the reliance on rumors. Students expressed a need for formal communication between student organizations, units, and departments as well as exposure to more resources. Communication is also needed for programs that have recently been developed because “the structural support is sometimes not there”. The types of programs mentioned were integrated undergraduate/graduate programs, interdisciplinary degrees, and general integrated programs. Students wanted standardization of advising as well but are hoping the Peer Advising program my help. Students ended with a discussion on retention and student mental health. Students stated that first and second year graduate students are not getting the academic and personal support needed. Graduate students are feeling isolated with “no process in place to address their needs in a nonacademic way”. Students did praise the Center for Black Digital Research and the Diversity Alliance Group.

Faculty voiced concern on having control over their classrooms. This included masking, mode of delivery (impact on enrollment and teaching pedagogy), and curriculum review processes (which faculty stated gets stopped at the level of Associate Dean/Dean). Length of required
grade entry was a problem as well. Faculty stated that the short time span deters individuals from using “better” assessments. They stated that not all professors have small class sizes and if they had time for preferred methods of assessments it might help on prerequisites in other courses. Faculty, like students, expressed “extreme” concern over the Oliver Baker case. Faculty said they did not understand the process, thought there was an abuse of the AC70 process, and felt that their concerns were not and have not been addressed. Faculty also question the lack of internationalization in “stopping the employment” of faculty who are teaching from abroad. They understand there might be tax and other legal implications, but it seems as if the University is “closing down instead of expanding globalization”. Faculty want the students to be able to interact with experts in the field when they are discussing international topics and wonder if World Campus is under the same structure. There was also extensive support for teaching faculty. Faculty express a need for equity among all faculty. Faculty stated that the College of Liberal Arts was consistently low in teaching faculty salaries at University Park. They stated that wages are “undignified” and most in those positions are only able to stay at the University because they have significant others to “make up the (salary) difference”. Faculty stated postdoctoral individuals have a listed minimum salary, but faculty do not. All of the above leave the faculty feeling betrayed and the upper administration viewed as “uncaring and cold”. There also seems to be inequity in benefits and gender issues at the lecturer level as well. Faculty stated that FT1 and FT2 lecturers do not have paid parental leave nor are they included in salary increases. Faculty also stated they were told there would be no equity raises this year and wanted to know if all departments were receiving the same message. Faculty transitioned and ended the discussion with the question of “How are we going to attract, retain, and advance a diverse faculty so growth can take place?”

*Bellisario College of Communication*
(March 24, 2022; Attendance per meeting group – staff 1, students 0, faculty 0)

- 11/17/21 Meeting date of 3/24/22 was chosen by Bellisario College of Communication administration
- 1/14/22 Zoom meeting links were created by the University Faculty Senate Office and sent to Bellisario College of Communication administration along with a request for a final itinerary
- 1/21/22 Final itinerary was sent from Bellisario College of Communication administration to the University Faculty Senate Office
- 3/14/22 Bellisario College of Communication administration sent an email to the University Faculty Senate Office to reschedule the administrative portion of the visit based on a conflict
- 3/24/22 Due to a lack of participation the rescheduled administrative portion of the visit was cancelled. It is unsure whether there was a lack of communication or miscommunication within Bellisario College of Communication about the visit. A new visit with Bellisario College of Communication will be placed on the Fall 2022 schedule.

*Ross and Carol Nese College of Nursing*
(April 19, 2022; Attendance per meeting group – staff 30, faculty 21, students 3)
Staff began the conversation with work/life balance. They asked if there was a policy to be able to work on a flexible schedule. Staff stated they have proven that they can work successfully from home. It was very important to staff to keep that flexibility. With the new Dean in place, staff stated that salaries have recently been reviewed. Select staff have received raises and faculty salaries have increased. Staff are concerned about staff workload and retention. They stated there has been a “flurry of coworkers leaving the College and going elsewhere”. Staff state there is not an investment in employees. Issues mentioned were failed searches due to noncompetitive salaries, lack of opportunities for promotions, salary bands that allow for new hires to earn as much or more than current employees, and increased workload based on lower staff to student and faculty ratios. Staff state there is a discrepancy between staff and faculty treatment which is evident in policies and actions. An example given was office environments. Staff state that faculty have offices but are only in them for a few hours while staff are “cramped” and some share office space without external light. From the University at large the staff stated the lack of transparency damages credibility. They feel they never hear the full story especially with University finances. Examples given were asking to conserve money and not hearing how that is helping the University as well as building new building but not performing maintenance on existing buildings.

Faculty stated that the administration was very supportive in dealing with challenges related to COVID. These challenges led to cooperative efforts between the College of Medicine and the College of Nursing on the Hersey campus. Communication and networking have been strengthened, initiatives have been combined, and the staff, faculty, and students now feel as though they are part of the Hersey campus. Faculty did state that the human resource model is “broken at the University”. They said every step of the hiring process is a “nightmare” and takes much more time and effort than before. This takes away from the mission of teaching, service, and research. Faculty stated that it is difficult to receive responses from Human Resources and some representatives have been rude. Faculty asked if the human resource survey results would be released but cautioned that the responses would not be as robust and frank as they would be if the University had used an outside entity to conduct the survey. Faculty stated there was a shortage of clinical instructors and asked about multiple year contracts and promotions. They also voiced a need for more flexibility in requirements for clinical instructors especially with the requirement to gain a terminal degree as well as the timeline for that process. With the shortage, requirements, working environment, and many local Schools of Nursing in the Hersey area faculty worry about recruitment and retention of clinical teaching faculty. Faculty stated that the College is making efforts to keep lines of communication open through all faculty meetings. This is in an effort to keep curriculum consistent in meeting and implementing objectives across all campuses. Faculty stated it was hard to create relationships throughout the College based on office locations. Faculty also stated there was a need to have a safe place to communicate issues, problems, and concerns since there is a fear of speaking out.

Students stated they chose Penn State and the College of Nursing because it was recognizable, had a good reputation, consisted of multiple graduate degree options (PhD, EdD, DNP), organizational interaction, World Campus, international aspects, and bioethics. Once they arrived at the College of Nursing they stated that faculty members are supportive and flexible in developing plans of study. They are given diverse options to explore dual interests and receive feedback for mixing philosophical information with the clinical applications. Graduate students
stated that they have multiple places to communicate concerns such as the Doctorate Student Organization (DSO), peers in their programs, and their academic advisors. A suggestion from the students would be more organizational advertising and consideration in the timing of events. Additional suggestions from the graduate students were more access to summer funding and stipends especially for international students, in person intensive sessions (similar to DNP) built into other programs, and collaboration between the PhD and DNP programs. Students stated the College is doing a good job at interdisciplinary collaboration but there is a divide between PhD and DNP students. They suggested that the College could be an innovative leader in cross over and collaboration between these two degrees therefore creating a “phenomenal opportunity to understand complimentary rolls”.

**College of Health and Human Development**  
(April 21, 2022; Attendance per meeting – staff 15, faculty 10, students 10)

The staff began the meeting with staff retention concerns which revolved around the lack of advancement opportunities and flexibility in the work environment. Staff stated the current employment model does not value staff experiences. This is based on the need to leave the University or the College for advancement and new hires entering at the same salary level or at a slightly higher level both of which seem like a “slap in the face”. Staff also state they have proven that working from home has been successful and would like clear guidelines on keeping that flexibility. Currently they stated they have to ask for the flexibility on a daily basis creating guilt, feelings of being needy, and frustration. The opportunities are not equitable across units which causes resentment and a sense of “increased hierarchy”. Staff stated inequities are also seen across departments and units in the areas of support and resources. Staff ended by discussing the University wide problem of interdomain courses and additional course requirements which potentially affect the timeline for graduation thus doing a disservice to the students.

Faculty would like better relationships between directors and faculty so messages can be heard at the same time and faculty input can be provided. Instead of being “talked to” faculty would like to collaborate. Faculty stated that there are more tenure line individuals in the College however the College’s University Faculty Senate representation consists largely of teaching line faculty. They stated this issue was initiated as an administrative observation. Faculty questioned the motivation behind the administrative observation. Faculty believe the imbalance may be due to the College placing low value on service during promotion and tenure reviews. Faculty also were concerned about tenure line faculty data specifically in the areas of gender, race, and pay inequities to name a few. Other items of mention were the need for best hiring practices policies, academic freedom for all faculty, and access to better healthcare and health and wellbeing facilities.

Students want to build more of a community especially with diverse students. Students would like a designated place to advertise all Health and Human Development events with equitable resources. They also were concerned with a shortage of mental health counselors which has led to a “failure in the system”. Students stated a problem with learning/teaching assistants as well, particularly with continuity of preparedness and resources. Graduate students stated a need for “more uniform communication on the process” of program completion. They stated not only a
need for transparency in the program completion process but in appeal processes if “something goes wrong”. More help is also needed for graduate students who do not make it through the program and need other advising options. The meeting ended with students asking for more diversity in the College curriculum. HDFS 129 was listed as not being enough to satisfy this need. Not only would they like additional diversity in the general curriculum but spaces to meet people from “different walks of life” to help eliminate ideas of prejudice.

Prepared by:
Lisa Mangel, Faculty Senate Secretary, in consultation with Faculty Senate Chair Bonj Szczygiel, Chair-Elect Kim Blockett, and Immediate Past Chair Beth Seymour.

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2020-2021 University Faculty Ombudsperson Report

(Informational)

Background

The position of University Faculty Ombudsperson was established by the Senate Committee on Committees and Rules on March 31, 1998. The duties of the University Faculty Ombudsperson are defined in the University Faculty Senate’s Standing Rules, Article III, Section 9.

“The University Faculty Ombudsman shall coordinate the training of all college and campus ombudsmen; shall provide for the appropriate dissemination of information among the various college and campus ombudsmen; and shall be the university-level contact for the various college and campus ombudsmen. The University Ombudsman shall report periodically to the Senate Council and shall maintain liaison with the Office of the University Provost, the Office of Human Resources and the Senate Office. The University Ombudsman shall have no appeal function.”

The Selection and Responsibilities of the Academic Units Ombudspersons (referred herein as ombudspersons) are defined by the Policy AC76:

A. An Ombudsperson shall be appointed in each of the colleges, campuses and academic units. For those not associated with an academic unit, or in cases where the appropriate ombudsperson may be in doubt, the following policy shall be applied:
   1. Where appropriate, the ombudsperson will be from the same academic unit to which the employee is most closely associated. For example, research associates in the Applied Research Laboratory will have access to the ombudsperson for the College of Engineering.
   2. In cases where there is disagreement or doubt as to the appropriate ombudsperson, the Executive Vice President and Provost shall make the determination.
   3. In cases where the ombudsperson is in doubt as to his or her jurisdiction, he or she shall ask the Executive Vice President and Provost for a determination.
B. The Dean, Chancellor, or other appropriate campus official and the faculty shall jointly develop selection procedures for the ombudsperson. Normally, the role of ombudsperson will be performed by a single person, with a designated alternate. In unusual circumstances, a group of not more than three persons may be selected. No one who is a member of the Committee on Faculty Rights and Responsibilities shall serve as ombudsperson.
C. Functions for the ombudsperson are:
   1. Clarification of misunderstandings;
   2. Advising faculty and administrators as to appropriate courses of action;
   3. Assisting in the informal resolution of differences;
4. Assuring that appropriate department, college and/or campus procedures are exhausted before referring the case to higher levels;

5. Informing the Office of the Executive Vice President and Provost and appropriate college or campus officials if a matter cannot be resolved at the lower level and the case is to be referred to the Committee on Faculty Rights and Responsibilities.

6. The ombudsperson shall not:
   - Hold hearings;
   - Exceed the role of conciliator and advisor;
   - Substitute his or her judgment for that of appropriate administrative and/or faculty bodies;
   - Serve as counsel for either party to a complaint before the Hearing Board.

The Ombudspersons, including the University Ombuds, also play an important role in AC70’s procedures for dismissals of tenured and tenure eligible faculty.

**A. The Steps That Shall be Followed to Initiate the Dismissal Process**

1. Within a reasonable time after the occurrence of events that might give rise to termination for adequate cause are made known to the appropriate administrator(s), the faculty member will be provided with written notice from the administrator(s) of the alleged misconduct constituting adequate cause. The notice shall include a copy of or references to this AC70 policy and sufficient information concerning the allegations to enable the faculty member to make a meaningful response.

2. The faculty member will be given an opportunity to respond to the allegations either in writing or at a meeting with the appropriate administrator(s), or both, at the discretion of the faculty member against whom allegations of misconduct have been made. The affected faculty member shall be accorded a reasonable amount of time to prepare a response to the allegations.

3. The faculty member shall have the opportunity to meet with the appropriate administrator(s) and they will be given an explanation of the alleged misconduct. The administrator, at their discretion, may respond to the written submissions of the faculty member at this meeting. The appropriate ombudsperson shall be present as an objective, informational resource at the meeting unless the faculty member waives, in writing, the right to have the ombudsperson present. The meeting may be continued at the discretion of the administrator(s) should there be a need for additional time to resolve the matter or to obtain additional information or otherwise for other good cause.

These formal rules have been augmented by practice norms and the commitment of the Ombuds to ensure close and positive relationship with the office of the Provost to ensure the proper functioning of the institution of the Ombuds in a coherent way throughout the university system.
Appendix N  
9/13/22

The Senate based Ombuds system also works with the Office of Research Protections to enhance communication and build capacity. In addition, it is the understanding of the University Faculty Ombuds that some Colleges also maintain additional or different systems of Ombuds available to their faculty, staff, and students. In this environment, the Senate Ombuds system is one of several resources available to faculty, but also the only one to play a role with respect to faculty disciplinary protocols under AC70 and 76.

Introduction

Ombudspersons provide valuable services to the faculty and they are trusted resources for the faculty. Ombudspersons are committed to listening to the faculty; answering questions; explaining policies and procedures; providing information and advice; exploring possible solutions; suggesting appropriate referrals; assisting in pursuing a resolution; and informally and appropriately aiding in communication in disputes that may arise. This function has become increasingly important as the complexity of the university’s rule systems increases and the risk of compliance failures rises.

To enhance communications among unit ombudspersons, and to further coordination and coherence in the work of the Ombuds, the University Faculty Ombuds hosted a series of meetings during the 2020-2021 academic year. An Ombudsperson Orientation meeting was held in August 18, 2021 with Vice Provost Kathy Bieschke, Senate Executive Director Dawn Blasko, and the University Faculty Ombudsperson Mohamad A. Ansari. Additional meetings were held in December, 2020 and February 2021. Additional meetings and consultations were undertaken by the University Faculty Ombuds throughout the year.

This informational report is drafted by the University Faculty Ombudsperson and is submitted to the Senate Council on behalf of all academic units’ Ombudspersons from across the University. The purpose of this report is to summarize the activities and the services that were provided to the faculty by the ombudspersons during 2020-2021 academic year.

In order to assess the ombudspersons’ activities, on July 1, 2021, the Senate Office distributed “A 10 Question Survey” to all ombudspersons and alternate ombudspersons (71 total) from 23 Commonwealth Campuses, 12 University Park colleges (including University Libraries), Great Valley, Penn State Law, Dickinson Law, and the College of Medicine.

Survey Questions and Responses

The Senate Office received 39 reports from the ombudspersons and alternate ombudsperson, a 56% response rate to the survey. This response rate represents a decrease of 22% over last year.

1. How long have you served as your unit’s Ombudsperson or alternate?
   Of the ombudspersons who answered this question,
   • 13 served 1 year;
   • 23 served 2 to 5 years;
   • 3 served 6 to 11 years;
1. I served more than 20 years.

2. **How many matters have you been asked to help resolve in the past year?**
   During the 2020-2021 academic year, ombudspersons reported 46 cases. This is a decrease of 18% over the 56 cases that were reported during the previous academic year.

3. **For each matter, what were the key issue(s)? (e.g., lack of communication, promotion and tenure, harassment, incivility, performance review, etc.)**
   The following issues were reported by the ombudspersons:
   - Lack of communication/Miscommunication/Poor Communication (6 cases);
   - Incivility/harassment (3 cases);
   - Performance review, (2 cases);
   - Promotion & Tenure (P&T) 2 cases;
   - Compensation/teaching load;
   - Student harassment of instructor;
   - Gender discrimination (2 cases);
   - Research authorship;
   - Academic freedom;
   - Dismissal from the University;
   - Abuse of Power;
   - Retirement letter;
   - Health care charges and insurance (2 cases);
   - Covid related work and travel issues (3 cases).

4. **What was the position of the person against whom the complaint was lodged? (e.g., staff, faculty, administrator, if other, explain)**
   During 2020-2021 academic year, ombudspersons received complaints against students, faculty, Administrator, Department Chairs, Program Director, School Director, Chancellor or DAA.

5. **What steps were taken to resolve the issue?**
   During 2020-2021 academic year, ombudspersons assisted faculty by facilitating communication, clarifying policies, providing information, and discussing options. The following are responses to this question are quoted from the survey:
   - “Communicated with faculty member.”
   - “I started by meeting with the employee to allow them to discuss their concerns and perceptions of the issue. . . Then I was present for a performance review discussion with the Academic Affairs dean and HR representative…”
   - A tenure eligible faculty member “contacted me … and wanting me to be present at any and all meetings related to this person's performance review.”
   - “I have set up meetings with the aggrieved. In some cases, we reasoned that the aggrieved faculty member should bring the behavior to the attention of the Head. In some
cases, the faculty member decided to speak to the problem person on their own. In another case, I am still . . . setting up three-way conversations in which we discuss the problematic behavior and how it can be avoided in the future.”

- “I observed a meeting between the faculty member, the campus chancellor and HR representative.”
- “Prior to my involvement, faculty member had meeting with administration, and then asked me for support. I involved university ombudsperson given novelty of case to me. His support was key in helping faculty member understand rights. Faculty member pondered options ahead of meeting with administration where I also attended, and made decision on best path forward after the meeting.”
- “Pointed faculty member to HR Academic Strategic Partner at suggestion of university ombudsperson.”
- “Communicated concerns to Dean.”
- “listening; 3rd party in meetings; a Title IX complaint” was filed
- “listening and discussion, referred back to DH”
- “FR&R”
- “The ombudsman met with the faculty member and upon mutual agreement facilitated and was present at the meeting between the faculty member and administration.”
- “The ombudsman met with the faculty member and offered possible avenues for conflict resolution.”
- “The ombudsman met with the faculty member and offered possible avenues for conflict resolution.”
- “2 face to face meetings where the parties involved were able to discuss their concerns, create a plan to move forward”
- “One meeting between myself and the person to talk through things.”
- “I helped the person with the problem to come up with a plan of action that included communications with three colleagues.”
- “Discussed and developed options for faculty to pursue.”
- “individual consultation, and attending meeting as an observer”
- “In the first case, regarding communication, there was really no issue to resolve. The faculty member just wanted a sympathetic ear. In the second case, I communicated the issue to h. r. personnel and helped the faculty member connect to the right people to discuss the situation.”
6. **How many of the cases were resolved at the Ombudsperson level?**
   During 2020-2021 academic year, at least 22 cases out of 46 cases (47.8%) were resolved at the stage at which the Ombuds was involved. This rate is higher than the rate that was reported in the previous academic year (29.4%).

7. **How many cases were referred to the Senate Committee on Faculty Rights and Responsibilities or other offices?** (e.g. Affirmative Action, Human Resources, etc.)
   During 2020-2021 academic year, at least 7 cases were referred to the Senate Committee on Faculty Rights and Responsibilities (FR&R).

8. **Were you aware of situations in which a colleague could have consulted an ombuds but went straight to another resource (e.g., Affirmative Action, Human Resources, etc.)? If so, please explain.**
   Thirty-four or the thirty-nine respondents answered no. The following responses to this question are quoted from the survey:
   - “One person has gone to the Head and to HR about complaints about the colleague.”
   - “Yes, [the faculty member] did consult with me after talking with HR about the issue, and then I referred the person back to the HR Academic Strategic Partner.”
   - “Yes. Most frequently HR. To my knowledge, HR has never referred a faculty member to me as ombuds. I don't think HR has a clear idea of the roles that the ombuds can serve and in fact may sometimes divert from ombuds contacts.”
   - “A few colleagues talked to me as a friend/peer about issues they were facing and I mentioned that they could go to the main ombusperson to help discuss or resolve the issue. The issues were related to: (1) a female colleague feeling disrespected by a male colleague [this person eventually spoke with our Director of Inclusion and Diversity instead of the main ombudsperson] and (2) a colleague felt uncomfortable about a political discussion that happened during a hallway conversation after a faculty meeting and he felt as though he would be negatively judged by others because of a more conservative comment he made [this person decided to just drop the issue]”
   - “Yes, in one instance a colleague elected to reach out to their Discipline Coordinator, and also their Dean.”

9. **In your role as a college/campus Ombudsperson, did any issues concerning the Ombudsperson process arise which should be addressed by the University Faculty Senate? If so, explain.**
   Thirty-five or the thirty-nine respondents answered no. The following responses to this question are quoted from the survey:
   - “Yes. There are differences between the clock to be an emeritus faculty member and the clock to keep HSA funds after retirement. At a minimum, there is need for retirement planning and specific details made available to faculty members hired at different times, given that the policy apparently changed within the last decade or so. General retirement policy advice doesn't seem sufficient. Beyond this, perhaps aligning the two timelines (emeritus status and HSA/other benefit timelines) would be beneficial.”
• “It seems inappropriate that the form says that the ombudsperson should report to the administration when a faculty member is going to file an FR&R petition. That seems to me to be a violation of confidentiality as we have no way of knowing if the petition will actually be filed. In practice, I don't think this is done, but the rules say it is a requirement.”

• “I was told by the Faculty Senators for my campus that situations like the Covid-related case involving international travel were already under discussion at the Senate level.”

• “Possibly. The faculty member has requested to teach online because of health issues. Penn State University denied this request twice.”

10. Are there any suggestions you would like to make that could be useful to another ombudsperson, especially a new one? Are there additional meetings (beyond the fall orientation) that you would like to have with other unit ombuds during the academic year?

The following responses to this questions are quoted from the survey:

• “I found having other ombudspersons to reach out to for support very helpful.”

• “It would be helpful to understand how to follow-up with these individuals--what's appropriate and what isn't and to what degree, the Ombud should simply wait for people to make contact. That is, should I be more reactive or proactive throughout this process?”

• “If you haven't been in therapy yourself, you may want to study therapy!”

• “If you feel out of your depth with an issue, or need any advice don't hesitate to contact Dr. Ansari. He provided invaluable assistance with the case described above, and it is unlikely that it would've been resolved so favorably without his expertise.”

• “I wonder if Microsoft Teams could be used for general support on an on-going basis. While I have had amazing support from the university ombudsperson, it may be an added bonus to have access to examples of cases (with any identifiers and important details removed) from other campuses. This could help with learning how to handle cases that emerge on our own campuses.”

• “Ombuds should be provided with mandatory DEI training and complete the Safer People Safer Spaces training.”

• “I think the training and website are sufficient for finding the necessary info.”

• “I think ombudspeople should receive training in how to provide mediation and support. It is not a given that the selected persons will have these capabilities.”

• “Was not aware of fall orientation. That would be helpful.”

• “Don't hesitate to reach out to the University ombudsperson for suggestions.”

• “I would like to sit in and just observe some cases so that I get a better understanding of the role.”
• “Yes. We really need an outline of what we can and cannot say. I was hamstrung. The abuse on the part of the administrator and especially the HR rep was sickening.”

• “Perhaps more training and explanations on exactly what our responsibility is as an ombudsperson.”

• “Listening is key.”

• “The orientation was very helpful.”

The University Faculty Ombudsperson takes all suggestions seriously and will respond or reach out to the appropriate person as necessary. The University Faculty Ombudsperson welcomes further inquiry from the Senate as appropriate.

Respectfully,

Mohamad A. Ansari,
University Faculty Ombudsperson

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Overview. For the 2021-22 academic year, the Faculty Senate Standing Committee for Curricular Affairs was charged with providing an update on intercultural knowledge and competence, otherwise known as the United States Cultures (US)/ International Cultures (IL) criteria. In March 1990, the University Faculty Senate established a Cultural Diversity graduation requirement, which was broadened in 1997 to the “Intercultural and International Competence Requirement”; the requirement was further expanded to a 3-credit course designated as United States Cultures (US) and a 3-credit course designated as International Cultures (IL) in 2004. In April 2016, the University Faculty Senate updated the language in the US-IL requirement including mandating at least 50% of course content addressed by the designation criteria.

During these updates, the criteria for US/IL course designations were not substantially revised. The recent reports from the Joint Diversity Awareness Task Force specifically call on Senate to do this work.

Summary of Existing Criteria. The US/IL curricular requirement and the learning criteria for courses to meet this curricular requirement are the purview of the University Faculty Senate. Undergraduate students pursuing a bachelor’s degree are required to take one three-credit course that meets the US requirements and one three-credit course that meets the IL requirement. A three-credit course with both the US and IL attributes can be used to meet either, but not both, of these requirements.

The key literacies and abilities addressed in the General Education Learning Objectives have been designed to ensure that the curricular choices the faculty at Penn State make will “enable students to acquire skills, knowledge, and experiences for living in interconnected contexts, so they can contribute to making life better for others, themselves, and the world.” Along with critical and analytical thinking, integrative thinking, and social responsibility and ethical reasoning, the global learning objective is particularly relevant to the content and activities in US/IL courses:

The intellectually disciplined abilities to analyze similarities and differences among cultures; evaluate natural, physical, social, cultural, historical, and economic legacies and hierarchies; and engage as community members and leaders who will continue to deal with the intricacies of an ever-changing world. Individuals should acquire the ability to analyze power; identify and critique interdependent global, regional, and local cultures and systems; and evaluate the implications for people’s lives.

The US/IL requirement plays a complementary role in extending these general education learning goals. Under the current criteria, courses that receive the US and IL designations must
devote at least 50% of the course content to accomplishing the intended learning objectives and include at least two components from specified lists:

**UNITED STATES CULTURES**
A course that fulfills the United States Cultures requirement must strive to increase students' understanding of contemporary United States society. Such a course need not focus exclusively on the present and may concern a historical subject. Courses with the United States Cultures designation will include two or more of the following components and will include those components in the graded evaluation of student performance:

1. cultivate student knowledge of issues of social identity such as ethnicity, race, class, religion, gender, physical/mental disability, age, or sexual orientation;
2. convey to students knowledge of different United States values, traditions, beliefs, and customs;
3. increase student knowledge of the range of United States cultural achievements and human conditions through time;
4. increase student knowledge of United States social identities not in isolation, but in relation to one another (for example, the interaction of race or gender with socioeconomic status);
5. introduce students to interpersonal communication and interaction issues among United States cultures;
6. increase student understanding of the nature of societal justice, and equity in the United States at the societal, institutional, and individual levels.

**INTERNATIONAL CULTURES**
A course that fulfills the International Cultures requirement must strive to increase student knowledge of the variety of international societies and may deal to some extent with U.S. culture in its international connections. It need not focus exclusively on the present and may, indeed, be a historical subject. Courses with the International Cultures designation will do two or more of the following:

1. cultivate student knowledge of the similarities and differences among international cultures;
2. convey to students knowledge of other nations' cultural values, traditions, beliefs, and customs;
3. increase students' knowledge of the range of international cultural achievements and human conditions through time;
4. increase students' knowledge of nations and cultures not in isolation, but in relation to one another;
5. introduce students to interpersonal communication and interaction issues among international cultures.
6. increase student understanding of the nature of societal justice, and equity in international nations at the societal, institutional, and individual levels.

At the time of this writing, the number of US courses offered and listed in the Bulletin was approximately 521. The number of IL courses listed in the Bulletin was about 1360. Note that 188 courses that are designated as both US and IL are counted twice.
Summary of Subcommittee Activities. The subcommittee began its work with what seemed like two simple questions: “What are the learning objectives we want to see in courses with the US and IL designation?” and “Where can these objectives be infused in the course proposals?” However, it quickly became apparent that the task was much more complex. The US and IL criteria intersect several important curricular initiatives: 1) anti-racism and social justice, 2) global learning, and 3) sustainability. The US and IL learning objectives cannot be clarified without first establishing the relationship of the US and IL designations to these areas of concern. Specifically, it must be determined whether US and IL courses are a means to incorporate these topics into the curriculum, or if increase in understanding of the US and international cultures stands separate from these other curricular goals, which are each non-subsumable pedagogical priorities. The committee conferred with the Vice Provost for Global Programs regarding the role of IL courses in global learning and awaited the recommendations from the Joint Curricular Task Force, (co-charged by the Faculty Senate and Presidential Commission on Racism) on anti-racism and social justice.

The committee determined that the best path would be to examine whether the current criteria was functioning as it was supposed to in the course approval process. Once they were able to make that determination, they would be able to explore a path to improve the alignment between the curricular goals of the US/IL designation and the courses with this designation. To begin that process, the committee members explored:

1. similar criteria from like institutions,
2. information about how the US/IL criteria are presented in course proposals, and
3. developments at Penn State on global learning.

Through this exploration, the committee hoped to answer the following questions:

1. Whether and how other institutions formulate and implement similar objectives?
2. Whether and how proposals enunciate the criteria specified by the US/IL criteria, either in the course descriptions or learning objectives?
3. How do the US/IL objectives show up in the current US/IL courses?
4. How are the US/IL objectives integrated with global learning?

Findings for Question #1: How do other institutions implement similar objectives?
Most of Penn State’s peer institutions include knowledge of the United States (U.S.) and global learning as core curricular objectives, however, they often utilize different terminology. For the U.S. knowledge, the committee found: “American Cultures, Governance, and History” (UC Davis), “Civics Literacy” and “Human Cultures” (Purdue), “US Diversity” (NC State), and “American History and Government” (Missouri). For more global concepts, the committee saw: “Citizenship for a Diverse and Just World” (Ohio State), “World Languages and Cultures” (Indiana), “Cultural Competence” and “Plural Societies” (Maryland), and “International and Global Issues” (Iowa). Some of those surveyed had the U.S. requirement but not the global one, and vice versa. In general, though, the peer institutions have curricular requirements that address the same or similar topics that Penn State does, even if they are not presented nor delineated in the same manner.

The weight given to these topics by peer institutions is likewise similar to Penn State’s requirement. For example, NC State requires one course in “Global Knowledge” and one course
in “US Diversity.” Ohio State requires two courses in “Citizenship for a Just World,” as does Indiana, and Maryland requires either two courses in “Plural Societies” or one course in “Plural Societies” and one in “Cultural Competence.” The only outlier from the surveyed institutions was UC Davis, which requires one course in “American History & Institutions” and three in “Civic and Cultural Literacy.”

An analysis of the language these same institutions use to describe the goals of their required courses reveals that they are again similar to the language Penn State uses, some offer those faculty members proposing courses the ability to select their specific course objectives from a list. For example, at NC State, proposers for a U.S. Diversity course “will provide instruction and guidance that help students to achieve at least 2 of the following:

1. Analyze how religious, gender, ethnic, racial, class, sexual orientation, disability, and/or age identities are shaped by cultural and societal influences;
2. Categorize and compare historical, social, political, and/or economic processes producing diversity, equality, and structured inequalities in the U.S.;
3. Interpret and evaluate social actions by religious, gender, ethnic, racial, class, sexual orientation, disability, and/or age groups affecting equality and social justice in the U.S.;
4. Examine interactions between people from different religious, gender, ethnic, racial, class, sexual orientation, disability, and/or age groups in the U.S.”

At Ohio State, on the other hand, faculty writing proposals do not have the option to select, and instead lists the learning outcomes: “Successful students will be educated global citizens who can examine significant aspects of the human condition in local, state, national and global settings today, and in the foreseeable future. EXPECTED LEARNING OUTCOMES: Successful students will, prior to graduation, be able to:

- describe and analyze U.S. institutions, the cultural traditions that have formed and informed the nation, and the pluralistic nature of U.S. society;
- describe and analyze local and state institutions and the cultural traditions that have formed and informed these institutions, especially in Ohio;
- engage other nations, cultures and issues of global interdependence;
- explicitly examine and value various expressions and implications of diversity, both within and beyond U.S. society;
- describe, analyze, and critique the roles and impacts of human activity on both human society and the natural world;
- describe and apply skills needed to maintain resiliency and personal well-being in contemporary society;
- plan for professional and career development; and
- participate in a culture of engagement and service.

A third example comes from University of Indiana, which lists both course goals and learning outcomes. The goals include a brief summary and list of course requirements: “This requirement strives to increase student knowledge of the variety of international societies and may deal to some extent with U.S. culture in its international connections. It need not focus on the present but may, instead, be a historical subject. The requirement seeks to expand student knowledge of world affairs, cultures, societies, and values; explore traditions grounded in different cultural paradigms; and provide a framework for understanding and appreciating the ideas and values of
different cultures. These goals are intended to provide a foundation for basic understanding and knowledge, which will be further developed in more advanced studies; internationalization and globalization should infuse a student's experience at Indiana University. Specifically, the 6-credit-hour World Languages and Cultures requirement has the following goals:

1. to understand elements that distinguish cultures from one another and to be able to compare cultural perspectives;
2. to gain the linguistic tools to communicate in another language at the intermediate level;
3. to develop analytical skills appropriate to the study of international and intercultural relations; and
4. to apply such understanding and skills by means of active participation and reflection in programs of study outside the United States.”

University of Indiana’s learning outcomes are the following: “Students who complete the World Languages and Cultures requirement will demonstrate

1. an understanding of culture within a global and comparative context (specifically, an understanding that a particular culture is one of many diverse cultures and that alternate perceptions and behaviors may be based in cultural differences);
2. knowledge of global issues, processes, trends, and systems (such as economic and political interdependency among nations, environmental-cultural interaction, global governance bodies, and nongovernmental organizations);
3. knowledge of other cultures (including beliefs, values, perspectives, practices, and products);
4. the ability to use cultural knowledge, diverse cultural frames of reference, and alternate cultural perspectives to think critically and solve problems;
5. the ability to communicate and connect with people in other language communities in a range of settings for a variety of purposes, developing skills in each of the four modalities: speaking (productive), listening (receptive), reading (receptive), and writing (productive) [N.B. This learning outcome applies specifically to students who study a foreign language.];
6. the ability to use foreign language skills and/or knowledge of other cultures to extend access to information, experiences, and understanding.”

A further comparison of the language used in Penn State’s US and IL course criteria highlights the need to draft new criteria. Unlike its peer institutions, the Penn State US and IL criteria focus on passive transmission of information, as they state the need for courses to “convey” and “increase” student knowledge. Other institutions expect students in their courses to interact with the course content and “understand,” “analyze,” “examine,” “engage,” “interpret,” “value,” and “apply” the concepts.

Another feature that stands out in the examination of the language used in Penn State’s US and IL criteria when compared with other institutions is in the lack of attribution to any source for the features of contemporary society. Other institutions acknowledge the importance of understanding how existing and historical societal structures and systems contribute to human society, as well as how critical reflections on these structures and systems can be used to solve the problems of social injustices and inequities. Penn State only indicates that students should “have knowledge of the human condition through time.”
Some institutions are utilizing the VALUE rubrics created by the American Association of Colleges and Universities (AACU), which used information from existing rubrics and learning outcomes across many campuses to come up with fundamental criteria to evaluate student learning. For example, the rubric for Intercultural Knowledge and Competence consists of six criteria across three domains (knowledge, skills, and attitudes): cultural self-awareness, knowledge of cultural worldview frameworks, empathy, communication, curiosity, and openness. Not surprisingly, there is some overlap with the global learning rubric, which focuses on: global self-awareness, perspective taking, cultural diversity, personal and social responsibility, understanding global systems, and applying knowledge to contemporary global contexts.

**Findings for Question #2: How clearly do proposals enunciate the criteria specified by the US/IL criteria, either in the course descriptions or learning objectives?**

The quality of course proposals varies, which makes the quality of the descriptions of how courses meet the US and/or IL criteria variable as well. The primary issue of quality likely stems from the way the course proposal system is designed for the US/IL categories. For other course features in Curriculum Review and Consultation System (CRCS), criteria are listed with specific questions that must be answered, such as, “What components of the course will help students achieve the domain criteria selected above?” or “How will students be assessed to determine their attainment of the Learning Objective(s) of General Education covered in this course? This assessment must be included as a portion of the student's overall performance in this course.” For US and IL courses, no criteria are included and the “question” only states, “Intercultural Requirements,” leaving the proposers to compose a narrative without guidance. There is also no indication that the course’s learning objectives should include US and/or IL concepts. Compounding this confusion is the absence of a requirement for a specific assessment of the US/IL criteria, as well as the lack of a reliable way to determine if 50% of the course content is devoted to US/IL topics. In sum, then, the proposal descriptions and learning objectives are as likely as not to enunciate the US/IL criteria clearly.

**Positive Examples of Articulation of How the US and IL Objectives Are Fulfilled by a Course:**

**GER 128N The Holocaust in Film and Literature (US and IL)**

This course provides an introduction to the film, art, architecture and literature of the Holocaust through a historical survey of these traditions’ key texts, figures, and themes. Both US and international texts, artworks and traditions will be covered, as will both fictional and nonfictional treatments of the Holocaust. The course will focus on the defining aspects of the literature, art, architecture, and film and on what these traditions reveal about the Holocaust and about how we understand the Holocaust. The course will use Holocaust literature, art, architecture, and film to seek both the points of cohesion and the points of divergence that characterize the experience of the Holocaust, the interpretive cultures through which we approach the Holocaust, and Jewish and other cultures. The course will also introduce students to the concept and theory of trauma, and to its place in theories and traditions of representation, as well as to the concept and history of genocide. Students will analyze what has been called the Americanization of the Holocaust. Materials will consist predominantly of primary texts, including both fiction
and nonfiction film, prose fiction and nonfiction, poetry, installations, art, and drama. Course methodology will emphasize the close reading of texts and analysis not only of what is represented, but also of the “how” of representation, drawing students’ attention to genre distinctions and the different expectations we bring to fiction and non-fiction, to film, photographs, artworks, and the written word.

**HIST 113 Baseball in Comparative Perspective (US and IL):**

As an introduction to the comparative social history of baseball in the United States, Japan, and Cuba, HIST 113 is one of those rather rare courses that easily fulfills both the IL and US intercultural requirements.

**IL REQUIREMENTS:** This course meets the definition of an International Cultures course by the fact that roughly 50% of the course content is devoted to the study of the diverse cultures and societies that have adapted baseball as a major sport (the US, Japan, and Cuba), and several cultures that have largely had little interest in the sport (e.g., countries in Europe and Africa). This course increases students’ knowledge of the ways in which sports interacts directly with social, political, and even economic elements of different societies. The course’s examination of changes in participation, policies, and attitudes relating to baseball conveys knowledge of different values, traditions, beliefs, and customs regarding countries that have and have not embraced baseball as a sport.

Roughly half of the course’s content is devoted to cultivating student knowledge of the similarities and differences among a variety of cultures involved in baseball (criteria 1). Particular attention paid to the range of social and cultural achievements involving the development of baseball, thereby conveying to students a knowledge of variable cultural values, traditions, beliefs, and customs (criteria 2). Additionally, students will achieve an expanded knowledge of important cultural issues and broad overviews through time, in this case during the nearly 200 years in which baseball has been an active sport. (criterion 3).

The course fulfills the following three criteria: 1) by examining the social, political, and economic aspects of baseball, not in isolation but in relation to various regions that have and have not pursued baseball as a sport (criteria a). 2) By exploring the experiences of different political, economic, social groups involved in the sport of baseball, this course increases student knowledge of the historical origins of differing cultural values, traditions, beliefs, and customs among diverse groups, and how many of those values, traditions, beliefs, and customs have been reflected in baseball (criteria c). 3) This course increases knowledge about the range of cultural achievements and human conditions through time by comparing contemporary individuals and nations and their involvement in baseball, as well as tracing the evolution of the sport and its relationship to political, economic, and cultural beliefs and their impact on both elite and non-elite peoples (criterion e).

**US REQUIREMENTS:** This course meets the definition of a United States cultures course by encouraging students to develop an appreciation of the historical background of baseball in American society. This course increases students’ knowledge of the ways in
which changes in social, political, and ideological factors have interacted in the United States with the sport of baseball. The course’s examination of changes in attitudes toward baseball over time conveys knowledge of different values, traditions, beliefs, and customs. The course increases student knowledge of the range of United States cultural achievements and human conditions through time by surveying the evolution of these achievements and conditions through the lens of a single sport. Approximately 50% of the course content is devoted to 1: Cultivating student knowledge of issues of social identity in the United States. Particular attention is paid to issues of social identity such as the ways in which ethnicity, race, class, and gender have interacted with the sport of baseball; and 4: Increasing student knowledge of United States social identities in relation to one another and in relation to the sport of baseball, by revealing the manner in which race, class, and ethnicity can be viewed through the lens of baseball. This course expands and fosters students’ knowledge of the ways in which changes in material, social, and ideological factors have interacted with respect to a single sport—baseball.

The course fulfills the following three criteria: A: Students come to an appreciation of how different social identities in the United States developed in relationship to one another, particularly identities based on race, class, gender, and ethnicity through examination of baseball and its role in American society; C: By exploring the experiences of different groups in American history this course increases student knowledge of the historical origins of different cultural values, traditions, beliefs and customs of diverse groups of Americans, and how many of those values, traditions, beliefs and customs have impacted the present, especially the present in the context of baseball history; F: By exploring the history of baseball and the changing values associated with it, this course helps students to recognize and be sensitive to the different ways social identities have been valued.

Intercultural Requirements: IL and US educational student objectives will be assessed in a variety of ways which may include quizzes, tests, presentations, and papers that require students to demonstrate their understanding of the historical development of baseball, the different historical experiences of the sport in different areas of the world, and evolution of different values placed on the sport in different regions and at different times. Different versions of the course may follow different assessment schemes but all use more than one of these modes of assessment to achieve the IL and US educational student objectives.

EARTH 111 Water Science and Society (US)
Several elements of the class, expanded upon below, are consistent with the objectives of the United States Cultures requirements:

I. Cultivate students’ knowledge of issues of social identity such as ethnicity, race, class, religion, gender. Physical/mental disability, age, or sexual orientation:

Modern concerns about the availability and quality of water pit the needs of rapidly growing urban regions against those of agricultural communities. This conflict crosses state and international borders, and has created a divide between two distinct population
groups in the U.S. In most instances, the nature of this divide pits the needs of different ethnic and economic groups against one another. In many places, the growing water demand requires compromise, and thus modification of farming practices that places economic strain on dominantly minority farming communities. We will explore this conflict in depth by examining water issues and management history in Southern California, as well as in other parts of the American West.

Migrant workers in California's San Joaquin valley are exposed to toxic metals (e.g., selenium) put into aerosol form as old lakebeds remain dry. For example, we see high levels of silicosis in this low-income ethnic group. This same problem occurs in the Owens Valley where evaporative sediments from lake beds poison the air; lakebeds are dry because of water demands in Southern California cities (Cadillac Desert). The Ogalala aquifer is being drawn down at a rapid rate and is the main source of water for farming activities throughout the Midwest from the Dakotas down to Kansas, threatening a marked change in farm culture. Hokum Indian tribes inhabited AZ in the Mayan era. They created canal systems and irrigation with water from rivers with high levels of dissolved solids. As this agrarian society developed and grew, their soils became progressively over salinized and lost the ability to sustain food production.

2. Convey to students a knowledge of different United States values, traditions, beliefs, and customs:

Water rights issues dovetail with traditions, custom and belief, not in the religious sense so much as the cultural practice of making a living. People upstream own water rights and do not have to let the water go downstream to other users. In Wyoming and the Dakotas, people kill each other for access to small streams of water. In other cases, water rights and mineral rights are separate, yet gas or oil development includes major surface water release and/or groundwater withdrawal. The resulting hydrologic impacts include creation of temporary wetlands, and may negatively affect soil fertility. Different race groups and income classes have different levels of access to political and legal protection in this battle for water rights and management.

3. Increase students' knowledge of the range of United States cultural achievements and human conditions through time:

Development of water works in New York City helped resolve a major health crisis in the 1800s because low income people who can only afford to drink public water had better survival rates. Levees built to control flooding on the Mississippi protects cities such as New Orleans and St Louis homes of distinct US cultures in the US. The fanning and small town livelihoods along the Mississippi are also protected and changed by these water control measures.

The aqueduct system (begun by Mulholland) from the Sierra Nevada to Southern California that allowed Los Angeles and other large cities in the West to grow with distinctive cultural implications (see #1 above also). For example, power in the Western US is mostly hydroelectric. Building this infrastructure is an achievement that is intrinsically linked with cultural change in the West. Las Vegas is a cultural icon (of dubious values but interest to students) intrinsically linked with this technological
achievement. The history of Las Vegas, along with its rapidly growing population (among the fastest growing cities in the U.S.), is a remarkable case study. Las Vegas was originally settled because surface water was available; today much of the city's water demands are met by groundwater withdrawal. The excess demand has resulted in groundwater overdraft, land subsidence, and issues with water quality. Today, the booming economy there allows the city's "lifestyle" to be maintained in the short-term, with the help of relatively expensive mitigation strategies that include groundwater injection.

4. Increase students' knowledge of United States social identities not in isolation, but in relation to one another (for example, the interaction of race or gender with socioeconomic status):

Denver's current demand for water drives technology to move water from the west to the east slope of the Rockies, pitting farmers on the western slopes (Utah, Western Colorado) against a new urban demand and Denver developers. Similar conflicts occur in much of Central and Southern California (see #1 above). An eastern example is the struggle over pollution of the Chesapeake Bay. Point sources from cities are a problem, but nutrient loading from agriculture has a huge impact on fishing (oysters, crabs), eliminating a culture group.

Examples of Under-Articulation of How the US and IL Objectives Are Fulfilled by a Course

ARTH 305 Romanticism and Revolution
The course concentrates in its entirety on works of art and historical periods that are international and non-US.

WMST 280 Gendering the Divine
This course fulfills IL requirements, as the entirety of the course focuses on non-Western religion, politics and history. This course addresses through its readings and assignments the following:
* Cultivation of students' knowledge of the similarities and differences among international cultures;
* Increasing students' knowledge of other nations’ cultural values, traditions, beliefs, and customs;
* Increasing students’ knowledge of the range of international cultural achievements and human conditions through time;
* Increasing students’ knowledge of nations and cultures not in isolation, but in relation to one another.
* Introducing students to interpersonal communication and interaction issues among International cultures.
* Increasing student understanding of the nature of societal justice, and equity in international nations at the societal, institutional, and individual levels.

MUS 93 Essence of Joy
We believe that the repertoire, which "includes music of African and African-American vocal and choral traditions," and specializes in works written by African-Americans,
along with the choir's tours and performances in the United States, eastern Europe, and Africa, justify both the US and IL designations.

Findings for Question #3: How do the US/IL objectives show up in the current US/IL courses?
The US/IL objectives, listed above, are rarely delineated in the current US/IL course proposals. The more effective proposals list the targeted objectives followed by clear explanations of how the course will result in those outcomes. More commonly, though, there is merely a brief narrative that does not include specific objectives. For the members of the US/IL subcommittee who are required to determine whether the courses meet the US/IL objectives, this is challenging, requiring the members to search through the proposal for evidence of the activities, descriptions, or learning objectives that seem to meet the criteria. This issue can also potentially be attributed to the lack of clarity in CRCS.

A consistent problem with courses with the US and IL designation is the lack of connection between the specific components of a course necessary for the designation and the course design and description. Focus on the context of a phenomenon (such as international accounting) or the place of origin (such as art/literature/philosophy from a particular place), rather than on how the course engages the material to meet the US and IL learning goals, is common in justifications for US and IL designation.

Additional Thoughts on Existing Criteria. Before moving on to the fourth question about the relationship between US/IL courses and global learning, some general findings from these explorations of the criteria are useful to acknowledge. First, the US criteria seem to be based on general guidelines that could be part of many courses offered at Penn State. Second, two of the components necessary for a US designation address US cultures and history broadly, while the other four specify aspects of intergroup relations, identity, and social justice. It is thus possible for students to meet the US designation requirement with no exposure to the origins and effects of structural inequalities in the United States, despite the emphasis on these themes in the list of components. Third, if 50% of the course content is to be devoted to US or IL content, it does not seem possible for a course to have both US and IL designations, and yet, there are some courses that have both. Fourth, the lack of alignment between bulletin descriptions and the US/IL learning goals that the courses are expected to fulfill provides no information for faculty teaching the course to support the organization of the course to achieve those goals. Finally, there is no accountability for achievement of the learning objectives, making the effectiveness of the criteria difficult to determine, as noted in a previous section.

Findings for Question #4: How do the US/IL objectives integrate with global learning?
The Global Penn State office is working to ensure that Penn State students are “seeing the world, sharing cultures and changing lives” and hoping to encourage intentional effort over multiple semesters to support students’ global awareness and global participation through experiential learning, all of which appears to overlap with some of the US and IL criteria. In fact, there is a clear relationship between enhancing global learning and diversity, equity, and inclusion. Attention to methodologies and pedagogies around global learning is necessary to ensure that the courses are advancing the learning objectives tied to the US/IL attributes. Incorporation of global learning objectives into the US and IL criteria can move both efforts forward.
The committee affirmed the view of global learning expressed by Roger Brindley, Vice Provost for Global Programs, that Penn State needs “an academic scope and sequence that enables students to understand what they are learning in the context of the global landscape” and that “the vast majority [of Penn State students] are likely to struggle if they do not have global understanding and competence when they graduate.” The committee further affirms the view that global competence requires more than one three credit class. The IL courses, which may provide a point of entry to global learning for students, are currently required to foster awareness rather than to build competence. Global competence, by contrast, requires intentional effort over multiple semesters within the students’ major course of study.

The range of disciplines that offer courses with the IL designation is promising for a discipline specific global focus. However, many courses rely on the “outside the US” context to justify the IL designation. These courses largely do not employ pedagogical practices to cultivate global learning.

Considerations for update. The US/IL subcommittee has eight considerations for continuing the process of revising US and IL criteria for the 2022-23 academic year. We plan to bring forward a legislative report later if appropriate.

1. **Utilize the report from the Joint Curricular Task Force to revise and focus the criteria for the US designation, ensuring that students are actively engaging with and critiquing the course content.**

   The US criteria express two different broad pedagogical goals. Components #2 and #3 require only that a course increases students’ knowledge of US cultures (#2) and human achievements and experiences in the US (#3). Components #1, #4, #5, and #6 require that courses focus on how these groups, cultures and experiences within the US relate to one another. This second set of components coheres in relation to themes of identity, equity, and mutuality in the context of a pluralist democracy with a complicated history of oppression. The US criteria appears to be motivated by these concerns given the 2/3 weighting of these components in the list, yet it ultimately makes them optional in a student’s curriculum. The committee recommends clarifying the goal of the US courses and aligning the criteria with those goals. One way to do this with the current criteria is to embed the second set of criteria hierarchically within the first, such that a course must accomplish at least one of objectives #1, #4, #5, and #6.

2. **Reduce and focus the number of possible criteria, possibly adding learning outcomes.**

   The criteria of the US and IL courses should be reduced and focused with clear distinction between the components that are crucial to the learning goals of these courses and the various means through which those goals might be achieved.

3. **Criteria should emphasize embedded and contextualized learning rather than 50% of course content.**

   While it is not possible for the intercultural understanding necessary to participate in both a pluralist democracy and a global society to be developed through one three credit class, the US and IL courses can provide a gateway to deeper global learning within students’
discipline specific coursework. To achieve their intended goal in the general education curriculum, these courses should follow best practices for cultivating intercultural competency, which involves embedded and contextualized learning rather than passive knowledge acquisition.

4. **Require that the criteria are included in the learning objectives of the course.**
To ensure that each iteration of a US or IL course includes the components necessary for the US/IL designation, these criteria should be clearly reflected in the learning objectives for the course.

5. **Include at least one assessment that specifically targets US/IL criteria.**
The courses proposal system should be modified to include a question about how the mastery of the US/IL objectives will be assessed. There are many strategies available to formulate and assess student achievement, including the *AAC&U Intercultural Knowledge and Competence Value Rubric*, the *Global Perspectives Inventory*, the *Intercultural Development Inventory*, the *Global Competence Aptitude Assessment*, and the *Global Competencies Inventory*.

6. **Incorporate global learning objectives.**
The IL criteria should be updated to incorporate global learning objectives with the expectation that IL courses provide a foundation or gateway into a global learning process within the student’s major. Global learning should be understood as an ongoing achievement rather than a consequence of a discrete academic experience. Use *Global Penn State* as a resource.

7. **Ensure the new curriculum proposal system (CIM) includes clear instructions for proposers.**
The new CIM system has the potential to better align the explanations for course attributes with the learning goals and the course descriptions. The proposal process is best understood as an opportunity to conceptualize how the course will meet specific curricular goals. The CIM system should include questions that enable the proposer to express the structure a course necessary to achieve those goals as guidance to faculty who may choose to teach the course across the Penn State system.

8. **Eliminate the possibility of courses fulfilling both US and IL requirements.**
While theoretically possible for a course to include topics that meet both the US and IL requirements, it is unlikely to cover both effectively. The dual designation also creates difficulties for advisors and degree audits.

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**2021-2022 SENATE COMMITTEE ON CURRICULAR AFFAIRS**

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US/IL Recommended Path to Improvement

Report Prepared by the 2020-21 US/IL Subcommittee Curricular Affairs Committee

Summary of US/IL Sub-Committee Activities

- Collect data on what other institutions are doing and look at what we are doing with US and IL courses.
- Analyze the information and make recommendations.
Existing US Cultures Criteria

A course that fulfills the US Cultures requirement must strive to increase students' understanding of contemporary US society. Such a course need not focus exclusively on the present and may concern a historical subject. Courses with the US Cultures designation will include two or more of the following components and will include those components in the graded evaluation of student performance:

- cultivate student knowledge of issues of social identity such as ethnicity, race, class, religion, gender, physical/mental disability, age, or sexual orientation;
- convey to students knowledge of different US values, traditions, beliefs, and customs;
- increase student knowledge of the range of US cultural achievements and human conditions through time;
- increase student knowledge of US social identities not in isolation, but in relation to one another (for example, the interaction of race or gender with socioeconomic status);
- introduce students to interpersonal communication and interaction issues among US cultures;
- increase student understanding of the nature of societal justice, and equity in the US at the societal, institutional, and individual levels.

Existing IL Cultures

A course that fulfills the IL Cultures requirement must strive to increase student knowledge of the variety of international societies and may deal to some extent with U.S. culture in its international connections. It need not focus exclusively on the present and may, indeed, be a historical subject. Courses with the International Cultures designation will do two or more of the following:

- cultivate student knowledge of the similarities and differences among international cultures;
- convey to students knowledge of other nations' cultural values, traditions, beliefs, and customs;
- increase students' knowledge of the range of international cultural achievements and human conditions through time;
- increase students' knowledge of nations and cultures not in isolation, but in relation to one another;
- introduce students to interpersonal communication and interaction issues among international cultures.
- increase student understanding of the nature of societal justice, and equity in international nations at the societal, institutional, and individual levels.
What Are Our Peer Institutions Doing?

- Similar goals regarding cultural competence and require all students to have similar numbers of credits/hours in these topic areas.
- Passive language (PSU) vs. student-centered active language (all others)

<table>
<thead>
<tr>
<th>Penn State</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Convey</td>
<td>Examine</td>
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<tr>
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- PSU criteria does not acknowledge sources of different values, beliefs, cultural practices (e.g., societal structures and systems).

How US/IL Criteria Appear in Existing Proposals

- Variable quality, possibly because of lack of instructions in CRCS
  - No requirement to delineate which criteria are addressed
  - Lack of connection between criteria and course description and objectives
  - Lack of explanation of how students engage with the material
  - Lack of assessment of what students learned about these topics
  - IL proposals often rely on “outside the US” to justify the IL designation
- Examples of thorough and not-so-thorough descriptions from proposals are included in report
Thoughts from the Subcommittee on the Criteria

Should the US criteria be a part of every or most courses anyway?

Structural inequalities as a concept isn’t a required component of US courses, since initiators have a choice of criteria

The 50% rule makes is unlikely that a US and IL course could competently deserve both designations

Bulletin descriptions lack explanation of how courses meet the criteria

No accountability for meeting the criteria

Four Recommendations to Improve

Utilize the report from the Joint Curricular Task Force to revise and focus the criteria for the US designation, ensuring that students are actively engaging with and critiquing the course content.

Reduce and focus the number of possible criteria, possibly adding learning outcomes.

Criteria should emphasize embedded and contextualized learning rather than 50% of course content.

Require that the criteria are included in the learning objectives of the course.
## Four More Recommendations to Improve

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Thank you, US/IL Subcommittee Members!

- Amy Linch (Co-Chair)
- Lisa Volk Chewning
- Megan Marshall
- Harold Hayford
- Johanna Slot
- Robert Melton
- Al Warner
- David Callejo Perez
- Roger Brindley
- Karin Sprow Forté (Co-Chair)
US/IL
Recommended
Path to
Improvement

Report Prepared by the
2020-21 US/IL Subcommittee
Curricular Affairs Committee

Summary of US/IL
Sub-Committee Activities

Collect data on what other institutions are doing and look at what we are doing with US and IL courses.

Analyze the information and make recommendations.
Existing US Cultures Criteria

A course that fulfills the US Cultures requirement must strive to increase students’ understanding of contemporary US society. Such a course need not focus exclusively on the present and may concern a historical subject. Courses with the US Cultures designation will include two or more of the following components and will include those components in the graded evaluation of student performance:

- cultivate student knowledge of issues of social identity such as ethnicity, race, class, religion, gender, physical/mental disability, age, or sexual orientation;
- convey to students knowledge of different US values, traditions, beliefs, and customs;
- increase student knowledge of the range of US cultural achievements and human conditions through time;
- increase student knowledge of US social identities not in isolation, but in relation to one another (for example, the interaction of race or gender with socioeconomic status);
- introduce students to interpersonal communication and interaction issues among US cultures;
- increase student understanding of the nature of societal justice, and equity in the US at the societal, institutional, and individual levels.

Existing IL Cultures

A course that fulfills the IL Cultures requirement must strive to increase student knowledge of the variety of international societies and may deal to some extent with U.S. culture in its international connections. It need not focus exclusively on the present and may, indeed, be a historical subject. Courses with the International Cultures designation will do two or more of the following:

- cultivate student knowledge of the similarities and differences among international cultures;
- convey to students knowledge of other nations’ cultural values, traditions, beliefs, and customs;
- increase students’ knowledge of the range of international cultural achievements and human conditions through time;
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Karin Sprow Forté (Co-Chair)
An integrated undergraduate-graduate (IUG) degree program combines a Penn State baccalaureate degree with a master's degree as a continuous program of study. For most students, enrolling in an IUG program reduces the total time and thus tuition required to complete both degrees compared to enrolling in these sequentially.

IUG programs are approved by the Curricular Affairs committees of both Faculty Senate and Graduate Council, and appear in the bulletin. Although undergraduate students can find information about IUG opportunities within the descriptions of baccalaureate degrees, these are searchable only in the *graduate* bulletin. The bulletin indicates that there are 33 Masters programs that have been approved for integration with undergraduate programs, some with several possible undergraduate programs, for a total of 72 possible IUG opportunities for undergraduate students.

IUG programs that were completed from spring 2019 – fall 2021 are listed in Appendix A. Each year, 40 – 45% of completed IUGs are Accounting BS/Masters in Accounting, and another 20% are Architectural Engineering BAE/MAE. The IUG programs completed that are in *italics* in Appendix A do not appear in the bulletin; these likely represent work completed by Schreyer honors scholars as part of the special opportunities afforded to this population of students. A significant, though minor, number of students completed 2 or more concurrent undergraduate degrees and an integrated graduate degree; this was most often Accounting and Finance BS with Masters in Accounting.

About 200 students complete IUG degrees each academic year. The below table lists the numbers of IUG degrees that were completed in each term from spring 2019 – fall 2021, disaggregated by student self-identified ethnicity.

<table>
<thead>
<tr>
<th>term</th>
<th>total IUG</th>
<th># White</th>
<th># Intl</th>
<th># Asian</th>
<th># Hispanic/Latino</th>
<th># Black/African American</th>
<th># Multicultural</th>
<th># Hawaiian/Pacific Islander</th>
<th># Undisclosed</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP19</td>
<td>164</td>
<td>132</td>
<td>10</td>
<td>7</td>
<td>5</td>
<td>1</td>
<td>5</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>SU 19</td>
<td>8</td>
<td>7</td>
<td>4</td>
<td>1</td>
<td></td>
<td></td>
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<td>1</td>
<td></td>
</tr>
<tr>
<td>FA 19</td>
<td>44</td>
<td>29</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>SP 20</td>
<td>165</td>
<td>128</td>
<td>11</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>7</td>
<td>12</td>
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</tr>
<tr>
<td>SU 20</td>
<td>6</td>
<td>5</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
Among IUG degree recipients, approximately the same number of students self-identify as female as male (50-53% vs 47-50%). Fewer than 10% of IUG degrees are earned by historically minoritized students (e.g., Black, African American, Hispanic, Latino/a, Hawaiian, Pacific Islander, Indigenous, Native American).

**Summary.** Penn State undergraduate students can enroll in graduate degrees that are wholly integrated with their baccalaureate work, in a single, continuous, and coherent curricular path. An IUG is a special educational opportunity that enables students to obtain a graduate degree in less time and with lower total tuition than sequential degrees.

We find that students have planned and completed IUG programs beyond what the faculty have conceptualized; faculty should be encouraged to consider developing new opportunities for innovative IUG programs. However, the data also suggests that there is uneven access to and participation in IUG programs. Our committee recommends that programs and faculty consider barriers for participation by all students, including affordability, tuition and curricular structures, and how these opportunities are communicated and extended to all students. Additionally, the committee recommends review of the sources of unequal participation across these programs to identify best practices for inclusion.

**2021-2022 SENATE COMMITTEE ON CURRICULAR AFFAIRS**

Adams, Jeff  
Belanger, Jonna  
Berish, Diane  
Burkholder, Joel  
Callejo, David  
Chewning, Lisa  
Farrar, Katelyn  
Harper, Betty  
Hamaty, Paula  
Hayford, Harold, co-Vice-Chair  
Hemerly, Nathan  
Jordan, Matthew  
Kenyon, William, co-Vice-Chair  
Linch, Amy  
Linn, Suzanna
Mahoney, Joseph
Marshall, Megan
McCloskey, Andrea
Melton, Robert
Mistrick, Richard
Purdy Drew, Kirstin
Robinson, Brandi
Schulenburg, Janet
Slattery, Maggie
Slot, Johanna
Sprow Forte, Karin
Thomas, Emily
Warner, Alfred
Williams, Mary Beth, Chair
Yen, John
Integrated undergraduate-graduate degrees completed Spring 2019 - Fall 2021. Bold indicates most popular degree combinations; *italics* are IUG programs that do not appear in the bulletin.

<table>
<thead>
<tr>
<th>Undergraduate degree</th>
<th>with</th>
<th>Graduate degree</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCT BS</td>
<td></td>
<td>BADMN MBA</td>
</tr>
<tr>
<td>ACCTG BS</td>
<td></td>
<td>ACCTG MACC</td>
</tr>
<tr>
<td>ADPR BA</td>
<td></td>
<td>MEDIA MA</td>
</tr>
<tr>
<td>ADPR BA/JAPNS BA</td>
<td></td>
<td>INTAF MIA</td>
</tr>
<tr>
<td>AE BA</td>
<td></td>
<td>AE MAE</td>
</tr>
<tr>
<td>AERSP BS</td>
<td></td>
<td>AERSP MS</td>
</tr>
<tr>
<td>AMSCA BA</td>
<td></td>
<td>AMSTD MA</td>
</tr>
<tr>
<td>ARSCI BS/CAMS BA</td>
<td></td>
<td>ANTH MA</td>
</tr>
<tr>
<td>ASIA BA</td>
<td></td>
<td>INTAF MIA</td>
</tr>
<tr>
<td>ASTRO BS/MTHBS BS/PHYS BS</td>
<td></td>
<td>MATH MA</td>
</tr>
<tr>
<td>BBH BS</td>
<td></td>
<td>PH MPH</td>
</tr>
<tr>
<td>BIOL BS</td>
<td></td>
<td>CI M ED</td>
</tr>
<tr>
<td>BIOL BS</td>
<td></td>
<td>NEURS MS</td>
</tr>
<tr>
<td>BME BS</td>
<td></td>
<td>BIOE MS</td>
</tr>
<tr>
<td>CASBS BS/LBEBS BS</td>
<td></td>
<td>HRER MS</td>
</tr>
<tr>
<td>CE BS</td>
<td></td>
<td>CE MS</td>
</tr>
<tr>
<td>CEAED BS</td>
<td></td>
<td>CI M ED</td>
</tr>
<tr>
<td>CECA BS</td>
<td></td>
<td>CENG MS</td>
</tr>
<tr>
<td>CECA BS</td>
<td></td>
<td>ENVE MENG</td>
</tr>
<tr>
<td>CED BS/ECLBS BS</td>
<td></td>
<td>EEEF MS</td>
</tr>
<tr>
<td>CMLIT BA/GSBA BA</td>
<td></td>
<td>CMLIT MA</td>
</tr>
<tr>
<td>CMPEN BS</td>
<td></td>
<td>CSE MS</td>
</tr>
<tr>
<td>CMPSC BS</td>
<td></td>
<td>BGEN MS</td>
</tr>
<tr>
<td>COMP BS</td>
<td></td>
<td>COMP MS</td>
</tr>
<tr>
<td>EE BS</td>
<td></td>
<td>EE MS</td>
</tr>
<tr>
<td>EENG BS</td>
<td></td>
<td>EENG MS</td>
</tr>
<tr>
<td>ENENG BS</td>
<td></td>
<td>EME MS</td>
</tr>
<tr>
<td>ENGL BA</td>
<td></td>
<td>ENGL MA</td>
</tr>
<tr>
<td>ENGL BA</td>
<td></td>
<td>TESL MA</td>
</tr>
<tr>
<td>EPP BS</td>
<td></td>
<td>EDTHP MA</td>
</tr>
<tr>
<td>FILM BA/STAT BS</td>
<td></td>
<td>ASTAT MAS</td>
</tr>
<tr>
<td>FINCE BS</td>
<td></td>
<td>BADMN MBA</td>
</tr>
<tr>
<td>GEOBA BA/PLSC BA/ECLBS BS</td>
<td></td>
<td>ECON MA</td>
</tr>
<tr>
<td>GERBA BA/SOCBA BA</td>
<td></td>
<td>INTAF MIA</td>
</tr>
<tr>
<td>HPA BS</td>
<td></td>
<td>HPA MHA</td>
</tr>
<tr>
<td>HPA_BS</td>
<td>PH_MPH</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>IE_BS</td>
<td>IE_MS</td>
<td></td>
</tr>
<tr>
<td>INTPL_BA</td>
<td>INTAF_MIA</td>
<td></td>
</tr>
<tr>
<td>ISTBS_BS</td>
<td>IST_MS</td>
<td></td>
</tr>
<tr>
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<td>TESL_MA</td>
<td></td>
</tr>
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<td>HRER_MS</td>
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<td>PNGE_BS</td>
<td>EME_MS</td>
<td></td>
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<tr>
<td>PSYBS_BS/SPLED_BS</td>
<td>CI_M_ED</td>
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<td>PSYC_BS</td>
<td>APSYR_MA</td>
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<td>SECED_BS</td>
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<tr>
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</tr>
<tr>
<td>SOCBA_BA/CRMBA_BA</td>
<td>CRIM_MA</td>
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SENATE COMMITTEE ON FACULTY BENEFITS AND THE JOINT COMMITTEE ON INSURANCE AND BENEFITS

2021-2022 Annual Report on the Status of Benefit Changes

(Informational)

This report is a summary of Penn State health care benefit changes, changes under consideration, and issues discussed, for which the Joint Committee on Insurance and Benefits provided consultation with Penn State administration between April 2021 and February 2022.

2022 Penn State Benefits

**Health Plan Benefits in 2022**

The PPO and PPO Savings plans remained the two health plan choices in 2022 with Aetna as the third-party administrator (TPA) and CVS Caremark as the Pharmacy Benefit Manager (PBM).

The premium structure, the tiering for the PPO plan deductibles, and the seed money for the PPO Savings plan also remained the same as 2021. Both the PPO plan and PPO Savings plan continued to provide lower cost-sharing for preventive drugs under the prescription drug program. Under both plans, for certain preventive medications, the cost-sharing structures are illustrated below:

<table>
<thead>
<tr>
<th>Pharmacy</th>
<th>PPO Plan</th>
<th>PPO Savings Plan (Deductible Waived)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preventive Drugs</td>
<td>10% coinsurance</td>
<td>10% coinsurance</td>
</tr>
<tr>
<td>Formulary Brand Drugs</td>
<td>20% coinsurance</td>
<td>20% coinsurance</td>
</tr>
<tr>
<td>Non-Formulary Brand Drugs</td>
<td>40% coinsurance</td>
<td>40% coinsurance</td>
</tr>
</tbody>
</table>

Technical Service PPO and PPO Savings plan designs and percentages of salary contributions for 2022 are defined per the terms of the collective bargaining agreement and are not included in this report.

The charts below describe the provisions of each health care plan option.

<table>
<thead>
<tr>
<th>PPO Plan Provision Description</th>
<th>2016</th>
<th>2017</th>
<th>2018-2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deductible (Individual/Family)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Band 1: Less than or equal to $45,000</td>
<td>$250 / $500</td>
<td>$375 / $750</td>
<td>$250 / $500</td>
</tr>
<tr>
<td>Band 2: $45,001-$60,000</td>
<td>$250 / $500</td>
<td>$375 / $750</td>
<td>$375 / $750</td>
</tr>
<tr>
<td>Band 3: $60,001-$90,000</td>
<td>$250 / $500</td>
<td>$375 / $750</td>
<td>$500 / $1,000</td>
</tr>
<tr>
<td>Band 4: Greater than $90,000</td>
<td>$250 / $500</td>
<td>$375 / $750</td>
<td>$625 / $1,250</td>
</tr>
<tr>
<td>Out-of-Pocket Maximum (Excluding Deductible)</td>
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</tr>
<tr>
<td>Individual</td>
<td>$1,000</td>
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<td>Family</td>
<td>$2,000</td>
<td>$2,500</td>
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<td>Coinsurance</td>
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</tr>
<tr>
<td>Percentage</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preventive Care</td>
<td>Covered at 100%</td>
<td>Covered at 100%</td>
<td>Covered at 100%</td>
</tr>
<tr>
<td>Service</td>
<td>Office Visit</td>
<td>Specialist Visit</td>
<td>Urgent Care</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------</td>
<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Copay</td>
<td>$10</td>
<td>$20</td>
<td>$20</td>
</tr>
<tr>
<td>Special Visit</td>
<td>$20</td>
<td>$30</td>
<td>$30</td>
</tr>
<tr>
<td>Urgent Care</td>
<td>$20</td>
<td>$30</td>
<td>$30</td>
</tr>
<tr>
<td>Out-of-pocket Maximum</td>
<td>$1,000 / $6,000</td>
<td>$2,000 / $8,000</td>
<td>$2,000 / $8,000</td>
</tr>
</tbody>
</table>

### Pharmacy

#### Preventive Drugs*

<table>
<thead>
<tr>
<th>Drug Type</th>
<th>Generic Drugs</th>
<th>Formulary Brand Drugs</th>
<th>Non-Formulary Brand Drugs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>50% coinsurance</td>
<td>50% coinsurance</td>
<td>10% coinsurance</td>
</tr>
<tr>
<td></td>
<td>50% coinsurance</td>
<td>50% coinsurance</td>
<td>20% coinsurance</td>
</tr>
<tr>
<td></td>
<td>70% coinsurance</td>
<td>70% coinsurance</td>
<td>40% coinsurance</td>
</tr>
</tbody>
</table>

#### Retail

<table>
<thead>
<tr>
<th>Drug Type</th>
<th>Generic Drugs</th>
<th>Formulary Brand Drugs</th>
<th>Non-Formulary Brand Drugs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>50% coinsurance</td>
<td>50% coinsurance</td>
<td>50% coinsurance</td>
</tr>
<tr>
<td></td>
<td>50% coinsurance</td>
<td>50% coinsurance</td>
<td>50% coinsurance</td>
</tr>
<tr>
<td></td>
<td>70% coinsurance</td>
<td>70% coinsurance</td>
<td>70% coinsurance</td>
</tr>
</tbody>
</table>

#### Mail Order

<table>
<thead>
<tr>
<th>Drug Type</th>
<th>Generic Drugs</th>
<th>Formulary Brand Drugs</th>
<th>Non-Formulary Brand Drugs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>20% coinsurance</td>
<td>20% coinsurance</td>
<td>20% coinsurance</td>
</tr>
<tr>
<td></td>
<td>20% coinsurance</td>
<td>20% coinsurance</td>
<td>20% coinsurance</td>
</tr>
<tr>
<td></td>
<td>70% coinsurance</td>
<td>70% coinsurance</td>
<td>70% coinsurance</td>
</tr>
</tbody>
</table>

#### Specialty

<table>
<thead>
<tr>
<th>Drug Type</th>
<th>Formulary Drugs</th>
<th>Non-Formulary Drugs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>50% and $50 maximum</td>
<td>70% and $100 maximum</td>
</tr>
<tr>
<td></td>
<td>50% and $50 maximum</td>
<td>70% and $100 maximum</td>
</tr>
</tbody>
</table>

### Contributions**

<table>
<thead>
<tr>
<th>Category</th>
<th>Individual</th>
<th>2 Person</th>
<th>Parent/Child(ren)</th>
<th>Family</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1.81%</td>
<td>1.81%</td>
<td>1.51%</td>
<td>5.61%</td>
</tr>
<tr>
<td></td>
<td>4.40%</td>
<td>4.40%</td>
<td>3.68%</td>
<td>4.08%</td>
</tr>
<tr>
<td></td>
<td>4.08%</td>
<td>4.08%</td>
<td>3.41%</td>
<td>5.61%</td>
</tr>
<tr>
<td></td>
<td>5.61%</td>
<td>5.61%</td>
<td>4.69%</td>
<td></td>
</tr>
</tbody>
</table>

*Began 2020

**Pay used for employee premium contributions capped at $140,000
<table>
<thead>
<tr>
<th>PPO Savings Plan Provision Description</th>
<th>2016</th>
<th>2017</th>
<th>2018-2022</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Deductible</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual</td>
<td>$1,300</td>
<td>$1,600</td>
<td>$1,600</td>
<td></td>
</tr>
<tr>
<td>Family</td>
<td>$2,600</td>
<td>$3,200</td>
<td>$3,200</td>
<td></td>
</tr>
<tr>
<td><strong>Out-of-Pocket Maximum (Excluding Deductible)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual</td>
<td>$2,100</td>
<td>$1,975</td>
<td>$1,975</td>
<td></td>
</tr>
<tr>
<td>Family</td>
<td>$4,200</td>
<td>$3,950</td>
<td>$3,950</td>
<td></td>
</tr>
<tr>
<td><strong>HSA Seed (Individual/Family)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Band 1: Less than or equal to $45,000</td>
<td>$400 /$800</td>
<td>$600 /$1,200</td>
<td>$800 /$1,600</td>
<td></td>
</tr>
<tr>
<td>Band 2: $45,001-$60,000</td>
<td>$400 /$800</td>
<td>$600 /$1,200</td>
<td>$600 /$1,200</td>
<td></td>
</tr>
<tr>
<td>Band 3: $60,001-$90,000</td>
<td>$400 /$800</td>
<td>$400 /$800</td>
<td>$400 /$800</td>
<td></td>
</tr>
<tr>
<td>Band 4: Greater than $90,000</td>
<td>$400 /$800</td>
<td>$400 /$800</td>
<td>$200 /$400</td>
<td></td>
</tr>
<tr>
<td><strong>Coinsurance</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td><strong>Pharmacy</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Preventive Drugs</strong>*</td>
<td>Deductible waived*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generic Drugs</td>
<td>10% coinsurance</td>
<td>10% coinsurance</td>
<td>10% coinsurance</td>
<td></td>
</tr>
<tr>
<td>Formulary Brand Drugs</td>
<td>10% coinsurance</td>
<td>20% coinsurance</td>
<td>20% coinsurance</td>
<td></td>
</tr>
<tr>
<td>Non-Formulary Brand Drugs</td>
<td>10% coinsurance</td>
<td>40% coinsurance</td>
<td>40% coinsurance</td>
<td></td>
</tr>
<tr>
<td><strong>Retail</strong></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Generic Drugs</td>
<td>10% coinsurance</td>
<td>10% coinsurance</td>
<td>10% coinsurance</td>
<td></td>
</tr>
<tr>
<td>Formulary Brand Drugs</td>
<td>10% coinsurance</td>
<td>20% coinsurance</td>
<td>20% coinsurance</td>
<td></td>
</tr>
<tr>
<td>Non-Formulary Brand Drugs</td>
<td>10% coinsurance</td>
<td>40% coinsurance</td>
<td>40% coinsurance</td>
<td></td>
</tr>
<tr>
<td><strong>Mail Order</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generic Drugs</td>
<td>10% coinsurance</td>
<td>10% coinsurance</td>
<td>10% coinsurance</td>
<td></td>
</tr>
<tr>
<td>Formulary Brand Drugs</td>
<td>10% coinsurance</td>
<td>20% coinsurance</td>
<td>20% coinsurance</td>
<td></td>
</tr>
<tr>
<td>Non-Formulary Brand Drugs</td>
<td>10% coinsurance</td>
<td>40% coinsurance</td>
<td>40% coinsurance</td>
<td></td>
</tr>
<tr>
<td><strong>Specialty</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formulary Drugs</td>
<td>10% coinsurance</td>
<td>20% and $65 minimum</td>
<td>20% and $65 minimum</td>
<td></td>
</tr>
<tr>
<td>Non-Formulary Drugs</td>
<td>10% coinsurance</td>
<td>40% and $100 minimum</td>
<td>40% and $100 minimum</td>
<td></td>
</tr>
<tr>
<td><strong>Out-of-pocket Maximum</strong></td>
<td>Integrated with Medical</td>
<td>Integrated with Medical</td>
<td>Integrated with Medical</td>
<td></td>
</tr>
<tr>
<td><strong>Contributions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual</td>
<td>0.52%</td>
<td>0.63%</td>
<td>0.78%</td>
<td></td>
</tr>
<tr>
<td>2 Person</td>
<td>1.25%</td>
<td>1.53%</td>
<td>1.89%</td>
<td></td>
</tr>
<tr>
<td>Parent/Child(ren)</td>
<td>1.16%</td>
<td>1.42%</td>
<td>1.75%</td>
<td></td>
</tr>
<tr>
<td>Family</td>
<td>1.60%</td>
<td>1.95%</td>
<td>2.41%</td>
<td></td>
</tr>
</tbody>
</table>

*Began 2020

**Pay used for employee premium contributions capped at $140,000
Retiree Health

Retirees who are not Medicare-eligible subscribe to the same PPO or PPO Savings plan as active employees until they turn age 65. In the PPO, the 2022 rates remained the same as the 2021 rates as follows: retiree-only $185.08, retiree plus spouse $370.16, retiree plus children $277.62, and retiree family $462.70. In the PPO Savings plan, the 2022 rates are as follows: retiree-only $133.59, retiree plus spouse $267.18, retiree plus children $200.39, and retiree family $333.99.

Retirees who are Medicare participants can select the Part B Freedom Blue PPO plan as a Medicare Advantage plan that is fully insured by Highmark. For 2022, premiums for this plan remained at $80. Certain retirees who were age 70 and retired before 2007 pay a different rate.

2022 Health Plan Enrollment Data

For 2022 health plan enrollment data indicated:
- 11,685 or 70.3% of employees enrolled in the PPO plan
- 4,944 or 29.7% of employees enrolled in the PPO Savings plan
- 16,629 total employees enrolled in both plans in 2021 (5.40% increase from prior year)
- 257 moved from PPO in 2021 to PPO Savings plan in 2022
- 273 moved from PPO Savings in 2021 to PPO plan in 2022

The chart in Appendix A shows actual claim costs with premium cost share, employee out-of-pocket medical and prescription costs and cost sharing for the last three years between the University and employees.

The chart shows that Medical and Drug spend increased which can be explained by the following:
- In 2020, there was significant elimination and deferral of health care related to the COVID-19 pandemic due to temporary provider closures, mandated restrictions, and limited hospital capacity and decreased staffing available. Much of the care that was deferred in 2020 returned in 2021, which is the main reason for the cost increase.
- Total large claims over $100,000 increased 10% from 2020

Health Plan Costs and Cost-Sharing

The total healthcare costs for calendar year 2021 were $311,185,000. The healthcare plan costs and cost-sharing are in the Table below. There were no changes to the premium contribution percentages for faculty and staff and the plan designs did not change. Historically, lower utilizers of health care have elected the PPO Savings plan, leaving more members in the deductible phase which causes Penn State’s cost share to be lower.

The university offered the Benefits Mentor, a third-party plan comparison tool from IBM Watson Health, during the 2022 Benefits Open Enrollment period. This secure software provided a financial comparison of the out-of-pocket costs to employees for both the PPO and PPO Savings plans based on their medical and prescription drug claims for the prior year. The intent of the
tool was to be a source of information for employees to elect the healthcare plan that meets their needs and the needs of their families.

### CALENDAR YEAR 2021 Actual Costs (All Enrollees)

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Healthcare Costs*</td>
<td>$311,185,000</td>
</tr>
<tr>
<td><strong>PPO Plan Cost Share</strong></td>
<td></td>
</tr>
<tr>
<td>Participant OOP</td>
<td>9.4%</td>
</tr>
<tr>
<td>Premium Contributions</td>
<td>13.2%</td>
</tr>
<tr>
<td><strong>Total Employee Cost Share</strong></td>
<td>22.5%</td>
</tr>
<tr>
<td>HSA seed</td>
<td>0.0%</td>
</tr>
<tr>
<td>Penn State Cost Share</td>
<td>77.5%</td>
</tr>
<tr>
<td><strong>Total Penn State Cost Share</strong></td>
<td>77.5%</td>
</tr>
<tr>
<td><strong>PPO Savings Plan Cost Share</strong></td>
<td></td>
</tr>
<tr>
<td>Participant OOP</td>
<td>19.9%</td>
</tr>
<tr>
<td>Premium Contributions</td>
<td>11.8%</td>
</tr>
<tr>
<td><strong>Total Employee Cost Share</strong></td>
<td>31.7%</td>
</tr>
<tr>
<td>HSA seed ($3,693,918)</td>
<td>5.6%</td>
</tr>
<tr>
<td>Penn State Cost Share</td>
<td>62.7%</td>
</tr>
<tr>
<td><strong>Total Penn State Cost Share</strong></td>
<td>68.3%</td>
</tr>
<tr>
<td><strong>Contribution By:</strong></td>
<td></td>
</tr>
<tr>
<td>University</td>
<td>$234,970,000</td>
</tr>
<tr>
<td>Employee</td>
<td>$76,215,000</td>
</tr>
<tr>
<td><strong>Cost Sharing %</strong></td>
<td></td>
</tr>
<tr>
<td>University</td>
<td>75.5%</td>
</tr>
<tr>
<td>Employee</td>
<td>24.5%</td>
</tr>
</tbody>
</table>

*Includes medical and prescription drug paid claims, administrative fees, prescription drug rebates, HSA seed, stop loss fees and reimbursements. Does not include Freedom Blue Premium.

### Benefit Changes under Consideration Currently and/or Topics Discussed with No Change at this Time, or For Informational Purposes
A Health and Well-being Strategy is being implemented, which includes expansion of the WW (formerly Weight Watchers) program and additional communication of Health and Well-being topics throughout 2022.

SENATE COMMITTEE ON FACULTY BENEFITS (2021-2022)

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- Ingrid Blood
- John Champagne
- Wendy Coduti, Vice Chair
- Denise Costanzo, Chair
- Rita Foley
- Lorraine Goffe
- Peter Iliev
- Jill Musser
- Geoffrey Scott
- Stephen Snyder
- Nicole Swallow

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- Gina Burges
- Denise Costanzo
- Joseph Doncsecz
- Rita Foley
- Jill Musser
- Linda Rhen
- Benji Romig
- Geoffrey Scott
- J.T. Taylor
- Jennifer Wilkes
### Appendix A

#### Summary

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Members (Active and under 65)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PPO</td>
<td>30,889</td>
<td>30,505</td>
<td>30,002</td>
</tr>
<tr>
<td>PPO Savings</td>
<td>12,189</td>
<td>12,784</td>
<td>12,795</td>
</tr>
<tr>
<td>TOTAL</td>
<td>43,078</td>
<td>43,289</td>
<td>42,797</td>
</tr>
<tr>
<td><strong>Freedom Blue Premium</strong></td>
<td>$39,304,526</td>
<td>$33,402,696</td>
<td>$36,079,201</td>
</tr>
<tr>
<td><strong>Total Aetna Claims Paid (Active and under 65)</strong></td>
<td>$202,858,897</td>
<td>$201,204,037</td>
<td>$221,908,619</td>
</tr>
<tr>
<td><strong>Total Aetna Claims Paid and Freedom Blue Premium</strong></td>
<td>$283,813,395</td>
<td>$278,834,975</td>
<td>$307,429,476</td>
</tr>
<tr>
<td><strong>Aetna Claims Paid PMPY</strong></td>
<td>$3,417</td>
<td>$3,400</td>
<td>$3,864</td>
</tr>
<tr>
<td><strong>% Change in Total Spend PMPY (Active and under 65)</strong></td>
<td>9.3%</td>
<td>8.7%</td>
<td>11.8%</td>
</tr>
<tr>
<td><strong>Employee Contributions</strong></td>
<td>$36,067,035</td>
<td>$37,433,984</td>
<td>$40,090,966</td>
</tr>
<tr>
<td><strong>Retiree Contributions (under 65 and Freedom Blue)</strong></td>
<td>$14,508,509</td>
<td>$12,656,982</td>
<td>$12,915,700</td>
</tr>
<tr>
<td><strong>Total Contributions</strong></td>
<td>$50,575,544</td>
<td>$50,090,966</td>
<td>$49,976,820</td>
</tr>
<tr>
<td><strong>Total Aetna and Freedom Blue Cost net of Contributions</strong></td>
<td>$233,237,851</td>
<td>$228,744,009</td>
<td>$257,452,656</td>
</tr>
<tr>
<td><strong>Employee/Retiree Medical Out-of-Pocket</strong></td>
<td>$10,625,016</td>
<td>$10,781,628</td>
<td>$11,231,541</td>
</tr>
<tr>
<td><strong>Employee/Retiree Prescription Out-of-Pocket</strong></td>
<td>$2,155,104</td>
<td>$2,293,552</td>
<td>$2,001,046</td>
</tr>
<tr>
<td><strong>Total Employee Out-of-Pocket</strong></td>
<td>$12,780,120</td>
<td>$13,075,180</td>
<td>$13,232,587</td>
</tr>
<tr>
<td><strong>PMPY Employee Out-of-Pocket</strong></td>
<td>$3,417</td>
<td>$3,400</td>
<td>$3,864</td>
</tr>
<tr>
<td><strong>% Change in Employee OOP PMPY</strong></td>
<td>6.4%</td>
<td>6.2%</td>
<td>4.18%</td>
</tr>
<tr>
<td><strong>Net University Cost</strong></td>
<td>$233,237,851</td>
<td>$228,744,009</td>
<td>$257,452,656</td>
</tr>
<tr>
<td><strong>University Percent Share of Total Healthcare costs</strong></td>
<td>72%</td>
<td>73%</td>
<td>75%</td>
</tr>
<tr>
<td><strong>Employee Percent Share of Total Healthcare costs</strong></td>
<td>28%</td>
<td>27%</td>
<td>25%</td>
</tr>
</tbody>
</table>
Minimum and maximum employee out-of-pocket expenditures in 2021 (assuming lowest and highest premium formulas) and actual claims:

- The below chart illustrates the minimum and maximum out-of-pocket scenarios with the following assumptions:
  - The minimum assumes no claims and $25,000 salary level.
  - The maximum assumes the maximum OOP for each plan/coverage tier and $140,000 salary level.

<table>
<thead>
<tr>
<th></th>
<th>Individual</th>
<th>Family</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PPO</td>
<td>PPO Savings</td>
</tr>
<tr>
<td><strong>Minimum</strong></td>
<td>$378</td>
<td>$195</td>
</tr>
<tr>
<td><strong>Maximum</strong></td>
<td>$8,314</td>
<td>$4,667</td>
</tr>
</tbody>
</table>

- The PPO Plan did not have anyone meet the TMOOP of $7,150/$14,300 in 2021 due to the large number of copays that would be required to reach this level.
- Of the 354 who met the PPO Savings plan OOP max ($3,575 individual/ $7,150 family), 102 had individual coverage and 252 covered others. Penn State incurred an additional cost of $26,653,321 ($19,794,281 in medical claims and $6,859,040 in prescription claims) for these 354 members after meeting the OOP max.
- Data was used from the IBM Watson database
- Includes active employees only (pre-Medicare retirees have been excluded)
- Out-of-network claims were excluded.
SENATE COMMITTEE ON LIBRARIES, INFORMATION SYSTEMS, AND TECHNOLOGY

Library Renegotiations with Elsevier

(Informational)

PURPOSE
The purpose of this report is to inform faculty and other interested parties on the renegotiation of the university’s Elsevier license for ScienceDirect journals and to provide some details on the negotiation process and the role of faculty in the process to ensure that faculty retained easy access to any journals that are vital to their fields of expertise.

BACKGROUND
University Libraries has been negotiating with Elsevier because the cost of the ScienceDirect and other Elsevier databases have been increasingly 4%+/yr and there is need to contain the cost. Many universities are in the same situation.

Further, there were some concerns raised that if the Libraries had to reduce the number of Science journals it would retain access to in order to constrain costs, that some faculty might not have access vital to their fields of research or students may not have the journals they need to access for class assignments or undergraduate research projects. Thus, LIST was charged to ensure that if subscriptions to some Science journals were necessary that faculty would have a voice in making those determinations.

THE PROCESS
The University Libraries successfully negotiated and renewed Elsevier license agreement for 2022-2026. Work on this negotiation began in late fall 2020. The Libraries announced the outcome on January 6, 2022 by way of a Penn State news release University Libraries renews access to ScienceDirect for research benefit and following communication and consultations with various constituent groups.

While the non-disclosure agreement (NDA) prohibits Penn State from publicly sharing the negotiated terms, the University Libraries is happy to report the following that the following consultations were conducted:

• LIST 4/27/2021, 10/19/2021, 1/24/22
• University Research Council 12/3/2020, 9/9/2021
• College of Medicine Faculty Meeting 6/2/2021
• University Libraries (content selectors, subject experts, and administrators):
  o STEM libraries (unit meetings)
  o College of Medicine, Harrell Health Sciences Library meetings
  o Selectors Forum 7/29/2021 and follow-ups
o Shared Content Leadership Group (SCLG) meetings
o Library administrators’ meetings
o Additionally, subject librarians reached out to relevant colleges/departments to obtain input. Changes were made based on this user input to acknowledge unique disciplinary needs.

NEGOTIATION OUTCOMES
The Libraries achieved significant cost savings through negotiations and usage analysis. The Libraries also considered the ease with which a journal article could be accessed through interlibrary loan.

• Reduced annual price increase caps
• Maintained essential resources to support Penn State research while achieving cost savings

Negotiated / Renewed Content (2022-2026)
• ScienceDirect (e-journals)
  o Maintained essential titles (945 subscribed titles were retained/included)
  o Removed low use titles (171 titles total) via librarian/user input
  o Added new requested titles (four titles) via librarian/user input
  o Freedom Collection was not included, via librarian/user input
• Research Databases (Scopus, PURE, Scival, & Funding Institutional) for the Office of the Senior Vice President for Research
• Engineering databases (Compendex, Inspec, Knovel)

NEGOTIATION TEAM
• Mihoko Hosoi (co-lead), Associate Dean for Collections, Research, and Scholarly Communications
• Kelly Thormodson (co-lead), Associate Dean & Director, Harrell Health Sciences Library
• Ana Enriquez, Scholarly Communications Outreach Librarian
• Brandy Karl, Head, the Office of Scholarly Communications and Copyright
• Julia Proctor, Head, Acquisitions Services

SUMMARY
The University Faculty Senate Committee on Libraries, Information Systems, and Technology applauds the efforts undertaken by the administration of University Libraries to achieve needed and significant cost savings while maintaining easy access to vital journals and databases for students and faculty in the Sciences. Many efforts were taken to ensure faculty input into the process.

2021-2022 SENATE COMMITTEE ON LIBRARIES, INFORMATION SYSTEMS, AND TECHNOLOGY

Melba Amador
Kevin Bowley
Michael Busges
Faye Chadwell
Samuel Frederick
Dace Freivalds
Andrew Freiberg
Galen Grimes
Mihoko Hosoi
Chris Lucas
John Messner
Margaret Michels
Megan Neely
Kimlyn Patishnock
Crystal Ramsay
Francesca Ruggiero, Vice Chair
Ira Saltz, Chair
Jennifer Stedelin
Rebecca Waltz
Alison Watts
Budget Update

Faculty Senate
September 13, 2022

President’s Budget Priorities

Mission: The Pennsylvania State University is a multi-campus, land-grant, public research university that educates students from around the world and supports individuals and communities through integrated programs of teaching, research, and service.

WHAT we are trying to achieve:
1) Prioritize Access and Affordability to education
   • Focused enrollment management strategy
   • Assess net tuition by income level
   • Ensure flat to lowered net tuition for low- and middle-income students

2) Invest in Our Employees
   • Complete compensation modernization study
   • Benchmark positions
   • Calculate funding necessary to ensure employees are paid competitive salaries
   • Identify funding source for adjustments
Transparency and Reporting

**HOW** to get us to these goals will include the following:

**Budget Transparency and Education by Chief Financial Officer and University Budget Office (FY23)**

- University budget responsibilities moved to SVP Finance & Business/Treasurer (Chief Financial Officer)
- Weekly budget updates with ALC, PC, Financial Officers
- Present clear, accurate, transparent, and timely financial communications to stakeholders
  - Board of Trustees
  - President’s Council
  - Academic Leadership Council
  - Department Heads and Chairs
  - Faculty Senate
  - Staff Advisory Council

Planning and Accountability

**Financial Reporting, Planning, and Accountability (Timeline: FY23-FY26)**

- Reallocation of base operating budgets (FY23-FY26)
- Hired NACUBO consultant
- Created Budget Working Group: 2 deans, 1 chancellor, Interim Provost, Faculty Senate Chair, 1 faculty member, SVP F&B, SVP Chief of Staff, SVP Research, VPCC, Staff Advisory Council, OPAIR, Budget and Finance, Change Management
- New budget model allocation by late November
- Using EAB document as guide
- Working Group meets weekly to work through decision points
- All funds budget reporting and projections (FY24)
- Multi-year budget projections (FY24)
- Earlier budget timeline with initial 2-year budget (FY24 and FY25 budget approval in July 2023)
- Balanced budget by summer 2025
Budget and Finances

Healthy balance sheet

Moody’s (Aa1) and S&P (AA) ratings are strong with stable outlooks

Revenue challenges

- Enrollment revenue declines
- Flat appropriations from Commonwealth
- COVID-related revenue losses
- Successful fundraising campaign: 48% was for endowments, only 1% is completely unrestricted, 50% received to date

Expense challenges

- Competitive labor market
- High inflation for goods, services, food, equipment, fuel, utilities, agricultural expenses, maintenance, construction, etc...
- COVID-related expenses that were not reimbursed

2022-23 Tuition and Fees

<table>
<thead>
<tr>
<th>Tuition Increases and Rates per Semester</th>
<th>PA Residents</th>
<th>Non-PA Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower Division</td>
<td>% Inc</td>
<td>$ Inc</td>
</tr>
<tr>
<td>University Park</td>
<td>5.00%</td>
<td>$459</td>
</tr>
<tr>
<td>Altoona, Berks, Erie, Harrisburg</td>
<td>2.00%</td>
<td>$151</td>
</tr>
<tr>
<td>Abington</td>
<td>2.00%</td>
<td>$144</td>
</tr>
<tr>
<td>Brandywine, Hazleton, Lehigh Valley,</td>
<td>2.00%</td>
<td>$143</td>
</tr>
<tr>
<td>Schuylkill, Scranton, York</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beaver, DuBois, Fayette, Greater Allegheny,</td>
<td>2.00%</td>
<td>$136</td>
</tr>
<tr>
<td>Mont Alto, New Kensington, Wilkes-Barre</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shenango</td>
<td>2.00%</td>
<td>$133</td>
</tr>
<tr>
<td>World Campus</td>
<td>5.00%</td>
<td>$358</td>
</tr>
</tbody>
</table>

Student Fee changes: Student Initiated Fee: $5-8 at campuses, $9.74 at UP (combination of former Activities and Facilities Fee)

*Tuition and fee rates apply regardless of the method of instruction (that is, whether in-person or otherwise) and will not be refunded in the event instruction occurs remotely for any part of the Academic Year.
Prioritizing Access and Affordability

- Access and affordability are priority
- U.S. median household income: $67,521 in 2020
- PA median household income: $63,627 in 2020
- University will invest $14 million of tuition increase to provide financial aid to families with incomes of $75,000 or less to maintain net tuition price

Total University General Funds: Actuals and Proposed Budget

<table>
<thead>
<tr>
<th></th>
<th>Education &amp; General</th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Year-End Actuals</td>
<td>Proposed Budget</td>
<td></td>
</tr>
<tr>
<td>Sources:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Appropriation</td>
<td>297,056,000</td>
<td>302,156,000</td>
<td></td>
</tr>
<tr>
<td>Educational &amp; General</td>
<td>(1,451,000)</td>
<td>(1,451,000)</td>
<td></td>
</tr>
<tr>
<td>Tuition And Fees</td>
<td>2,008,311,000</td>
<td>2,136,832,000</td>
<td></td>
</tr>
<tr>
<td>F&amp;A and Invest Income</td>
<td>141,936,000</td>
<td>149,445,000</td>
<td></td>
</tr>
<tr>
<td>Academic Support from PSH</td>
<td>56,800,000</td>
<td>61,400,000</td>
<td></td>
</tr>
<tr>
<td>Other Revenues</td>
<td>183,793,000</td>
<td>196,767,000</td>
<td></td>
</tr>
<tr>
<td>Total Sources</td>
<td>2,690,425,000</td>
<td>2,847,149,000</td>
<td></td>
</tr>
<tr>
<td>Uses:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instruction</td>
<td>665,082,000</td>
<td>682,405,000</td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td>227,037,000</td>
<td>222,423,000</td>
<td></td>
</tr>
<tr>
<td>Public Service</td>
<td>54,914,000</td>
<td>60,822,000</td>
<td></td>
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<tr>
<td>Academic Support</td>
<td>568,204,000</td>
<td>609,409,000</td>
<td></td>
</tr>
<tr>
<td>Institutional Support</td>
<td>573,393,000</td>
<td>641,639,000</td>
<td></td>
</tr>
<tr>
<td>Student Services</td>
<td>176,119,000</td>
<td>184,989,000</td>
<td></td>
</tr>
<tr>
<td>Student Aid</td>
<td>179,816,000</td>
<td>236,118,000</td>
<td></td>
</tr>
<tr>
<td>Physical Plant</td>
<td>364,081,000</td>
<td>345,299,000</td>
<td></td>
</tr>
<tr>
<td>Auxiliary Enterprise</td>
<td>2,855,000</td>
<td>4,204,000</td>
<td></td>
</tr>
<tr>
<td>Total Uses</td>
<td>2,809,501,000</td>
<td>2,987,308,000</td>
<td></td>
</tr>
<tr>
<td>Surplus/(deficit)</td>
<td>(119,076,000)</td>
<td>(140,159,000)</td>
<td></td>
</tr>
</tbody>
</table>

Penn College

|                      |          |          |
| Sources:             | 103,186,000 | 103,196,000 |
| Uses                 | 113,541,000 | 112,008,000 |
| Penn College Surplus/(deficit) | (8,355,000) | (6,812,000) |
| Total General Funds (incl Penn College) | (127,431,000) | (148,971,000) |

*Appropriation transfers to College of Medicine of $1,055,000 and Penn College of $396,000
Achieving Balanced Budget

Generate additional revenues
- Enrollment
- State Appropriations
- Unrestricted Gifts
- Corporate Sponsorships
- Resource Optimization and Monetization

Identify unit and central expense savings
- Strategic Hiring Freeze
- Healthcare Plan
- Insurance
- Capital Projects

New budget allocation model

Questions/Discussion
MINUTES OF SENATE COUNCIL

Tuesday, June 7, 2022 – 1:30 p.m.
Remote via Zoom


Guests/Others by Zoom: E. Eckley, S. Findley, L. Pauley, B. Seymour, K. Shapiro

Absent:  S. Cohen, D. Costantino, W. Kenyon, R. Petrilla, M. Swinarski, D. Wolfe

A. CALL TO ORDER. Chair Stine, called the meeting to order at 1:30 p.m. on Tuesday, June 7, 2022.

B. MINUTES OF THE PREVIOUS MEETING

Since this is a special meeting of Senate Council, the April 5, 2022 Senate Council Minutes will be approved at the June 21 meeting.

C. ANNOUNCEMENTS AND REMARKS

Chair Stine introduced the purpose of this meeting. Kim Blockett is leaving the university and stepped down from her position as Chair of the Faculty Senate on June 6. At that point Shelli Stine became Chair. Shelli introduced Keith Shapiro to review Senate governance documents related to this issue.

Parliamentarian Shapiro shared a presentation that summarized the Bylaws related to this situation. From Senate Bylaws Article 1d: “If a vacancy occurs in the office of Chair, the Chair-Elect will move immediately into the office, complete the unexpired term, and continue through a full term as Chair.” K. Shapiro also presented Standing Rules Article I, Section 12.a that describes the term of Senate Officers begins “with the installation of the new officers at the last regularly scheduled meeting …”
M. Strickland questioned what happens to the open position of Chair Elect when Shelli takes the office of Chair. Chair Stine replied that there is no vacancy in the position of Chair-Elect. Shelli will continue in the position as Chair-Elect for the next year.

S. Snyder asked what will happen to the position of Immediate Past Chair next year when Shelli takes her elected year as Chair and Kim is not here to fill as Immediate Past Chair. B. Seymour replied that Senate Council will choose from the past chairs to serve as Immediate Past Chair. (See Bylaws Article I, Section 1d.) B. Szczygiel suggested that the Bylaws be reviewed to assure clarity in this process. A change in the word “vacancy” might be considered.

There were questions concerning the title of Chair Stine. Would she be referred to as “Acting Chair” or “Interim Chair” for this academic year? Parliamentarian Shapiro replied that the wording in the Senate Bylaws indicates that the Chair-Elect immediately becomes Chair, without descriptor. He also noted that there is no reference that the Chair-Elect position is vacant. Shelli Stine would hold both the Chair and Chair-Elect positions at the same time and no special election would be needed for the Chair-Elect position.

A question was raised about the difference between “acting” and “interim” chair. Provost Jones stated that for administrative positions, “acting” describes a person who is substituting when the permanent administrator is unable to complete the duties on a temporary basis but will later be returning to the position. Sabbatical leave or parental leave are some examples where an “acting” administrator would be appointed. An “interim” administrator position is held when an administrator has discontinued in the position and a search for the permanent replacement has not been completed.

C. Eckhardt suggested that Shelli be referred to as Interim Chair for the remainder of Kim’s term. She also noted that FAC would now be short by one faculty member.

V. Brunsden noted that the Senate Bylaws do not state what happens to the position of Chair-Elect when Shelli takes the Chair position. For consistency, it is important that Shelli also continues as Chair-Elect for this current academic year. He quoted Bylaws Article I, Section 1b: “The Chair-Elect, at the end of one year of service in that office, shall automatically succeed to the office of Chair.” This will only occur if Shelli continues to fill the role of Chair-Elect. There can not be an election now for Chair-Elect since that person would then be moving to Chair the following year. A. Sinha agrees that Shelli would hold both titles of Chair and Chair-Elect this upcoming academic year.

B. Szczygiel suggested that Shelli consider an assistant to complete the duties of both the Chair-Elect and Chair positions. Shelli plans to delegate some responsibilities to others in the Senate, such as attending ACUE. She also is considering someone who can provide a voice from the campuses. Provost Jones suggested that Shelli might choose to appoint an Acting Chair-Elect to assist in Senate duties in the 2022-23 Academic Year. The Acting Chair-Elect would not succeed to the position of Chair. Shelli would move from Chair-Elect to Chair at the installation of officers in the April 2023 meeting.
NEW BUSINESS: None.

ADJOURNMENT
The meeting was adjourned by a motion from Szczygiel and Brunsden at 2:00 PM

Minutes respectfully submitted by Laura Pauley, 6/14/2022.
MINUTES OF SENATE COUNCIL

Tuesday, June 21, 2022 – 1:30 p.m.
Remote via Zoom


Guests/Others by Zoom: K. Austin, K. Bieschke, E. Eckley, R. Egolf, R. Engel, L. Pauley, K. Vrana, M. Whitehurst,

Absent: J. Palma, R. Shannon, M. Swinarski,

A. CALL ORDER. Chair Stine called the meeting to order at 1:30 p.m. on Tuesday, June 21, 2022.

B. MINUTES OF THE MEETING OF April 5 and June 7, 2022
Senate Council Minutes were approved on a Szczygiel/Eckhardt motion

C. ANNOUNCEMENTS AND REMARKS
Chair Stine.

On June 14th, the Vice Provost for Faculty Affairs announced that revisions to HRG18, Paid Parental Leave for Faculty, will go into effect on July 1. The major changes to the policy involved updating the qualifying events, making leave time more equitable, and ensuring that teaching line faculty can be released from teaching responsibilities for the entire semester following a qualifying event. This work is an outstanding collaboration among the faculty senate, the administration, and human resources, and is an amazing example of what shared governance can do.
We will not have a plenary session on July 12th. There is currently no pressing work that must be completed in July and the officers want to be mindful of the time commitment we are asking of senators over the summer when many of them are not on contract.

Please submit any topics for future FAC consideration to any of the Senate Officers (Bonj Szczygiel, Josh Wede, and me) or the elected FAC members: Judy Ozment, Julio Palma, and Doug Wolfe.

**Provost, Nicholas Jones**

**Enrollment Status.** Graduate admissions are robust. Admissions for first-year students at the campuses are similar to last year. The changes in enrollments is in the first-year enrollments at University Park. Target of 8600 first-year students at University Park. We had 10,400 students who accepted admission to begin at University Park. A 1+3 Program was introduced where students begin at a Commonwealth campus with a scholarship in the first year and are guaranteed entrance to UP in the second year. The program offered $8000 scholarship and additional $3000 at campuses with residences. This was offered to all 8000 students entering at UP. Fewer than 200 students accepted this offer. The summer melt of acceptances is not known since many students accept admission to several universities. There may be a significant melt, including from international students. It is expected that there will be 9200 new students in fall. This is 600 more students than projected. Admission of graduate students from India has been increasing. There is a slight decrease in the number of admissions from China. It is not known if travel from other countries to the US will present some difficulties for international students.

**Covid and Planning for the Fall Semester.** No campus is in a Covid orange status county. So, there is no mask requirement at any campus. Hospital visits are being monitored and do not show an increase. The Covid plan for fall was presented to the executive leadership, Corona Virus Management Team, Faculty Senate leadership, University Staff Advisory Council, and Academic Leadership Council. The focus of the plan is now on educating individuals on what is testing and services are available and how to manage health needs. There will not be mandated masks or vaccines. If there is a new surge of Covid cases, this will be re-examined.

**Vice Presidents’ and Vice Provosts’ Comments**

**Vice Provost for Faculty Affairs, Kathy Bieschke**

**Searches Updates**

**Vice Provost and Dean of the Graduate School**—this search is in the recruitment phase. Tracy Langkilde, dean of Eberly College of Science, is leading this search and we’ve retained Witt Kiefer to assist us. Our expectation is that we’ll be bringing candidates to campus this fall.

**Dean of Penn State Law**—Chuck Whiteman, dean of the Smeal College of Business, is chairing this search and Isaacson Miller is assisting. We are in the second round of this search and we expect to bring candidates in early this fall.

**Dean of the College of Medicine**—this search is currently paused as we give President Bendapudi time to settle into her role and familiarize herself with the available data. Craig Newschaffer, dean of the College of Health and Human Development, is chairing this search and Witt Kiefer is assisting.
Chief Information Officer and Vice President for Information Technology—in late May, Jen Stedelin was appointed. Jen was previously the deputy chief information officer and associate vice president of enterprise systems and services at Penn State.

**Current Efforts**

As done every June, the OVPFA is busy updating promotion and tenure guidance to reflect issues that arose over the course of the past year and the updates will be released on June 30, 2022. All faculty will receive a link to the new guidance in the Faculty Digest that goes out the last Friday of the month (the Faculty Digest started during COVID and while we hope we never have to return to a COVID digest, we decided to transition the digest to news that is of specific interest to faculty members). A few topics that emerged this past year that I will work with the Faculty Affairs Committee on for 2023-2024.

In consultation with Provost Jones, I appointed two members to the University P&T committee as well as a chair. Amit Sharma, Professor of Hospitality Management, will serve as chair. Nasr Ghahramani, Professor of Medicine and Public Health Sciences at the College of Medicine, as will Aparna Joshi, Arnold Family Professor of Management, Smeal College of Business.

Also, in consultation with Provost Jones, I appointed two members to the Standing Joint Committee on Tenure and two alternates for 2022-2023. New members will be Laurie Badzek, Dean of the College of Nursing and Marilyn Well, Chancellor, Brandywine. Alternates will be Steve Carpenter, Dean of the College of Arts and Architecture and Margo DelliCarpini, Chancellor, Abington Campus and these individuals will serve as member in 2023-2024. Alternates typically move into the role of member the year following their term as alternates. I’ll be meeting with a wide range of stakeholders next week, including many from the Senate, to take a hard look at some process issues associated with the AC70 process (Dismissal Procedure for Tenured and Tenure-Eligible Faculty Members) and do what we can to improve documentation before another case goes before the Standing Joint Committee on Tenure.

**Interim Vice President and Executive Chancellor for Commonwealth Campuses, Kelly Austin**

The enrollment on campuses has shown some decline for PA and out-of-state students. There has been an increase in international students of about 300 and this offsets some of the decline. There are differences between campuses. Some campuses have an increase in enrollments and some are showing a decline.

There are several chancellor searches. The search at Hazelton is completed and Liz Wright was appointed as chancellor. There will be a search for chancellor at Great Valley. Colin Neill is now serving as interim chancellor at Great Valley. Altoona search will be starting soon. Megan Nagel is serving as interim at Greater Allegheny until a search is conducted.

The Board of Trustees will be meeting at York campus in July 21 and 22. The launch of the new campus web sites has occurred. The Raise-Me transfer program has started that provides micro-scholarship fund for students in community colleges.

**Vice President and Dean of Undergraduate Education, Yvonne Gaudelius**

No report.
**Vice Provost for Educational Equity, Marcus Whitehurst.**

In 2020 the university had its first community survey. The executives have looked at the results and Equity action plans are being prepared. Follow up survey is planned in 2023 or 2024. Dr. Jennifer Hamer, Professor of African American Studies and Senior Faculty Mentor, has agreed to serve as Interim Vice Provost for Educational Equity. She will start (has started) on July 1, 2022. The Office Educational Equity is also in the final stages of a search for its vacant Assistant Vice Provost position as well.

**Vice Provost of On-line Education, Renata Engel**

Observations about the summer and fall trends for World Campus include the following. Summer course enrollments have increased; however, the driver for that increase is in the number of resident instruction students taking World Campus courses. This may be the result of students’ increased awareness of World Campus offerings—a likely result of the COVID pandemic. That same trend is continuing into the fall, with temporary change of campus requests exceeding those of pre-pandemic years. And with respect to temporary change of campus students, international student requests are in proportion similar to previous years. The majority of requests are students from China, followed by South Korea. It is likely that World Campus headcount for undergraduate programs will remain steady this fall, and World Campus headcount for graduate programs will decrease slightly. Reduced applications due to the economy and increased competition in online education contribute to the trend. Our ability to retain students at a greater rate than we did five years ago has helped to soften that impact.

The program portfolio remains strong. This past year, World Campus worked with three academic colleges to develop approaches to offer professional doctoral education: doctorate of engineering, doctorate of nursing practitioner, and doctorate of education. In each case, there is still review through curricular committees; however, the manner in which they will be delivered and supported through the World Campus has been finalized.

Following the Remote Synchronous Taskforce Report shared at some of the Faculty Senate Committees at their April meetings, charges are being drafted and committee members will be identified to address the six recommendations in the report. Faculty Senate leadership will assist in identifying faculty members to assist with the implementation and response to the recommendations.

**Senate Officers: None**

**Executive Director, Laura Pauley:**

There will be a reception in the evening on September 12 to celebrate the centennial of the University Faculty Senate. Roger Egolf is leading the preparations for this reception with input from the Senate Officers and support from the Senate Office Staff.

**D. ACTION ITEMS:**

Unit Name Change Proposal for the School of Engineering Design, Technology, and Professional Programs (SEDTAPP) to the School of Engineering Design and Innovation (SEDI) The changes were approved with a Duffey/Eckhardt motion.
E. DISCUSSION ITEMS: None

F. REPORT OF GRADUATE COUNCIL, KENT VRANA
The search committee for the Vice Provost and Dean of the Graduate School has been recharged. The search committee is chaired by Dr. Tracy Langkilde and Kent Vrana is serving on the committee. The chair of the Graduate Council, Ken Davis was added to that search committee. The Graduate Council currently has a two-year chair position without a chair-elect. This is being changed so that there will be a chair-elect, chair, and past-chair position (each serving one-year terms) similar to the Faculty Senate. The Graduate Council Chair will again be Ken Davis next year. He will then be the Past-Chair of Grad Council next year. An election was held and the Chair-Elect for 2022-2023 will be Jan Reimann, Associate Professor of Mathematics (Eberly College of Science).

G. SENATE AGENDA ITEMS FOR September 13, 2022

FORENSIC BUSINESS: None.

UNFINISHED BUSINESS: None.

LEGISLATIVE REPORTS

SENATE COMMITTEES ON COMMITTEES AND RULES AND EDUCATIONAL EQUITY AND CAMPUS ENVIRONMENT
Revision to Standing Rules, Article II – Senate Committee Structure, Section 6(e) EECE DEI Addition
Approved on a Szczygiel/Eckhardt motion.

SENATE COMMITTEES ON COMMITTEES AND RULES AND OUTREACH
Revision to Standing Rules, Article II – Senate Committee Structure, Section 6(i) Outreach DEI Addition
Approved on a Szczygiel/Snyder motion.

SENATE COMMITTEE ON COMMITTEES AND RULES AND ADMISSIONS, RECORDS, SCHEDULING AND STUDENT AID
Revision to Standing Rules, Article II – Senate Committee Structure, Section 6(b) ARSSA DEI Addition
Approved on a Snyder/Duffey motion.

SENATE COMMITTEE ON CURRICULAR AFFAIRS
Legislative Updates to FYE/FYS, Policies 150-60, 150-65, 150-68, 171-40
Approved on a Szczygiel/Strickland motion.
ADVISORY/CONSULTATIVE REPORTS:

SENATE COMMITTEES ON FACULTY AFFAIRS AND INTRA-UNIVERSITY RELATIONS
  Revisions to AC-22L Search Procedures for Academic Administrator Positions
    (Formerly HR-22)
    Approved on an Eckhardt/Szczygiel motion.

INFORMATIONAL REPORTS

SENATE COMMITTEE ON CURRICULAR AFFAIRS
  US/IL Curriculum Requirements
    Page 12 included “Recommendations”. The wording will be changed since an informational report cannot have recommendations. Approved on a Kenyon/Cohen motion. 15 minutes is requested for this report.

  Integrated Undergraduate-Graduate Programs
    Approved on a Kenyon/Szczygiel motion. This report will be web only.

SENATE COMMITTEE ON LIBRARIES, INFORMATION SYSTEMS, AND TECHNOLOGY
  Library Renegotiations with Elsevier
    Approved on a Strickland/Findley motion. 10 minutes is requested for this report.

APPROVAL OF AGENDA FOR September 13, 2022
The agenda was not approved at this time since more reports will be considered for the Senate Plenary Agenda at the August 30 Senate Council meeting.

NEW BUSINESS: None.

ADJOURNMENT
On a Snyder/Cohen motion, the meeting was adjourned at 3:28 PM. Senate Council will next meet on August 30, 2022.

Minutes respectfully submitted by Laura Pauley, 8/2/2022.
MINUTES OF SENATE COUNCIL

Tuesday, August 30, 2022 – 1:30 p.m.
Hybrid Meeting, in person at 102 Kern and Remote via Zoom


Absent: N. Bendapudi, W. Kenyon

A. CALL TO ORDER. Chair Stine, called the meeting to order at 1:30 p.m. on Tuesday, August 30, 2022.

B. MINUTES OF THE MEETING OF June 21, 2022
Senate Council Minutes were approved on a Szczygiel/Eckhardt motion

C. ANNOUNCEMENTS AND REMARKS

Chair Shelli Stine.

Chair Stine welcomed Provost Justin Schwartz and President’s Chief of Staff Michael Wade Smith to the meeting. Chair Stine announced that an “Equity Moment” will be included in her comments in each Senate Council meeting. See an article she referred to here: https://www.aacu.org/liberaleducation/articles/pieces-of-the-puzzle. This format was followed from comments by Provost Schwartz in the last Academic Leadership Council. Chair Stine made comments about the importance of transparency, shared governance, and communication. Chair Stine announced that the Faculty Advisory Committee to the President met on July 13 and discussed the university budget and the budget process.
Provost, Justin Schwartz

Provost Schwartz iterated the importance of shared governance and communication between the administration and the Faculty Senate. The Provost described the current Strategic Hiring Freeze and the process of reviewing hiring requests. Identified core positions that needed to be filled, including positions currently in the hiring process. All non-tenure line requests have been reviewed. Units are now being asked for hiring requests for tenure-line faculty. When considering hiring requests, information about faculty retirements and departures, any institute co-funding, and student credit hour trends in the unit. Also considered is the dean’s discussion of the importance of the position. Faculty requests at University Park are reviewed by the Provost with financial input from Sara Thorndike.

Vice Presidents’ and Vice Provosts’ Comments

Vice Provost for Faculty Affairs, Kathy Bieschke

*Non-tenure-line contracts*

Given current budget challenges, my office will be leading an effort for developing and updating standard practice for notifying non-tenure-faculty who may be at the end of their contract as early as possible regarding renewal. We have been working hard in my office to develop standard practice issuing non-tenure-line contracts to current employees earlier in the academic year and no later than April 1.

*Search updates*

**Vice Provost and Dean of the Graduate School**—this search is in the recruitment phase. Tracy Langkilde, dean of Eberly College of Science, is leading this search and we’ve retained Witt Kiefer to assist us. Our expectation is that we’ll be bringing candidates to campus this fall.

**Dean of Penn State Law**—Chuck Whiteman, dean of the Smeal College of Business, is chairing this search and Isaacson Miller is assisting. We are in the process of interviewing finalists on-campus.

**Dean of the College of Medicine**—this search is currently paused, however, we will be re-initiating this search this month. I’m currently in the process of confirming search committee members and my plan is that we will meet in the next couple of weeks to discuss the path forward and the timeline. Craig Newschaffer, dean of the College of Health and Human Development, is chairing this search and Witt Kiefer is assisting.

*AC-70 Procedures*

A small working group has been hard at work updating the procedures for the implementation of AC70. Members of the working group include Laura Pauley, Erin Eckley, Shelli Stine, Bonj Szczzygiel, Keith Shapiro, Larry Backer, Michael Berube, Cody Meixner, and Katherine Allen. We have made some meaningful changes to the procedures, including an orientation, management of conflicts of interest, more clarity about who charges the committee, and
transparency about ex parte communications and confidentiality. There are close to being finalized and will be posted on my website and linked to the University Faculty Senate’s website.

Interim Vice President and Executive Chancellor for Commonwealth Campuses, Kelly Austin

1. Chancellor updates
   a. Lynda Goldstein – 3-year appt. as Chancellor/CAO
   b. Berks Chancellor update
   c. Great Valley Search
   d. Altoona Search
2. Jennifer Wilkes Associate Vice President Administration - OVPCC
3. Enrollment Update
   a. Incoming, PA OOS and Intl. What is impacting (demographics, college going rate, value proposition, etc.) Gaining clarity on trends, and better understanding of the why, and how we begin to tackle.
4. CWC Regional Meetings – Student Success Summit
   a. Revisiting Our Readiness to Move Toward Our Student Success Goals
   b. Using our Data Resources to Improve Readiness
   c. Student Success Priorities: Academic Preparedness, Belonging, & Mitigating Costs
5. The Office of the Vice President for Commonwealth Campuses hosted a campus leading practices session on Tuesday, August 16th. The campuses highlighted some of the great work happening across the Commonwealth as we look to extend these successful practices more broadly. Members of PC and ALC, and other academic leaders attended the sessions throughout the day.

Vice President and Dean of Undergraduate Education, Yvonne Gaudelius
Schreuer Institute develop guidelines for preparing for class absences. Starfish early progress window opens next Tuesday. This is an important early feedback for students, especially for first year students. There are four committees recently charged to look at having remote synchronous as a teaching mode: Instructional mode coding, instructional mode guidelines, support resources that need to be developed, revisions of Policy 80-55. Two strategic issues, demographics differences between the entering and graduating classes, how to bring an equity lense to instructional issues.

Vice Provost for Educational Equity, Marcus Whitehurst.
No report.

Vice Provost of On-line Education, Renata Engel
Observations about the fall and spring trends for World Campus include the following. The enrollment report for the university this fall shows a significant decrease in World Campus
headcount compared to last fall. This occurred because of the role WC played last year in addressing COVID. In Fall 2021, WC had an increased role to assist the university retain students through the Temporary Change of Campus process, which accommodated more than 1300 students, including 448 who were international and were caught up in the concerns over the Delta variant of COVID. The other impact came from WC graduate enrollments, which were impacted by the strong economy. So what is on the horizon, particularly given our goals on retention and conversion of students in the various stages of the conversion (yield) funnel? For fall semester, we are 1% ahead of where we were last year on new undergraduate students, and this is largely due to our successful efforts at the last stage of the conversion funnel for undergraduates, where we had 72% yield. And the same is true for graduate where we just saw a yield of 90% (up 2%) from last year. For spring, the World Campus accepts of admission have increased relative to last year by 10% and 16% for undergraduate and graduate programs, respectively.

My favorite numbers to share with Faculty Senate Council are the number of graduates. In 2021-2022, 3,985 students graduated from Penn State having earned their degrees through the World Campus. Thank you to the faculty and staff who support learners as they pursue their degrees online.

A few examples of the areas of focus this year are our continued efforts to support retention, specifically 1st-2nd term and 1st–2nd year retention, and our efforts to increase the yield of students who express interest in and apply to Penn State’s World Campus. To that end, we will be implementing some new approaches building on our student success strategies. One example is the creation of a progressive scholarship program, which was designed from our findings on an internal report that looked at the habits of practice of successful online and part-time students.

We are also launching an academic leadership series for program heads and academic leaders of World Campus programs to discuss topics of relevance to them. We will begin with offering this twice a semester, and if there is interest, move to once a month. Topics are intended to assist them in their roles as academic leaders of online programs. Topics include (but are not limited to) Future Directions in Online Learning, Instructor Support, Emerging Technologies, Marketing initiatives, Progress on Strategic Goals.

Senate Officers: None

Executive Director, Laura Pauley:
There will be a reception in the evening on September 12 to celebrate the centennial of the University Faculty Senate. Roger Egolf is leading the preparations for this reception with input from the Senate Officers and support from the Senate Office Staff. To date we have 120 people who have RSVP’d

Attendance and voting in the Senate Plenary will be done using the Senate Portal. Attendance in the morning committee meetings will also use this system. Destiny Anderson gave a short demonstration of the new voting system.

D. ACTION ITEMS:
The P-4 closure of the Fayette Associate Mining Technology Program was approved with an Eckhardt/Duffey motion.

The changes to the Graduate School unit constitution was approved on a Duffey/Eckhardt motion.

E. DISCUSSION ITEMS: None

F. REPORT OF GRADUATE COUNCIL, KENT VRANA
The search committee for the Vice Provost and Dean of the Graduate School has been recharged. A search firm was hired and successfully generated strong candidates. The finalist have been selected and the interview stage is beginning.

G. SENATE AGENDA ITEMS FOR September 13, 2022

FORENSIC BUSINESS: None.

UNFINISHED BUSINESS: None.

LEGISLATIVE REPORTS

SENATE COMMITTEE ON CURRICULAR AFFAIRS
Update General Education Policies 142-00, 143-10, 143-20, 160-20, 190-10, 192-00, 192-10, 192-20, 193-30
There were some questions about the level of consultation for this report given the importance of General Education policies. A paragraph will be added to explain how the changes in the Integrative Studies requirement will impact the GQ and GWS requirements.
Approved on a Shannon/Hughes motion.

SENATE COMMITTEE ON INTERCOLLEGIATE ATHLETICS
Policy 67-10 Division I – Athletic Competition (University Park)
Approved on a Petrilla/Hughes motion.

ADVISORY/CONSULTATIVE REPORTS:

None.

INFORMATIONAL REPORTS

SENATE COUNCIL
Report on Fall 2021 Academic Unit Visits
Approved on a Szczygiel/Duffey motion. This report will be web only.
Report on Spring 2022 Academic Unit Visits
Approved on a Szczygiel/Duffey motion. This report will be web only.

2021-22 Annual Ombudsperson Report
Approved on a Petrilla/Szczygiel motion. This report will be web only.

SENATE COMMITTEES ON FACULTY BENEFITS AND JOINT COMMITTEE ON INSURANCE AND BENEFITS
2021-2022 Annual Report on the Status of Benefit Changes
Approved on a Costantino/Szczygiel motion. This report will be web only.

APPROVAL OF AGENDA FOR September 13, 2022
E. Eckley displayed the reports approved for the September 13 Plenary meeting from the June 21 and August 30 Senate Council meetings. The Plenary Agenda and all requested times for Informational Reports was accepted on an Duffey/Fuller motion

NEW BUSINESS: None.

ADJOURNMENT
On a Szczygiel/Duffey motion, the meeting was adjourned at 3:40 PM. Senate Council will next meet on October 4, 2022.

Minutes respectfully submitted by Laura Pauley, 8/31/2022.
Date:  August 24, 2022
To:   Commonwealth Caucus Senators (includes all elected Campus Senators)
From: Roger Egolf and Judy Ozment, Caucus Co-Chairs

The Commonwealth Caucus Forum is a meeting of the Commonwealth Caucus senators that will usually be held from 8:15 p.m. – 9:15 p.m. at The Penn Stater Hotel on Monday night before each Senate plenary meeting. However, the Forum meeting is cancelled on September 12, 2022.

Instead, all Commonwealth Caucus Senators have been invited to attend:

**The Centennial Celebration**

**in Honor of Penn State University Faculty Senate’s 100th Anniversary**

**Date:** Monday, September 12, 2022  
**Time:** 6:00 p.m. to 8:00 p.m.  
**Location:** Hintz Family Alumni Center  
**Attire:** Business casual

Come early and enjoy our long-awaited evening of appetizers and mingling with fellow senators as we laud the countless achievements of the Faculty Senate.

Round-trip transportation by bus will be provided from The Penn Stater Hotel to the Hintz Family Alumni Center on regular intervals.

If you are able to attend, please RSVP at this link, no later than 12pm on Thursday, September 1, 2022: [https://sites.psu.edu/facultysenate/2022-centennial-rsvp/](https://sites.psu.edu/facultysenate/2022-centennial-rsvp/)

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**Commonwealth Caucus Business Meeting**

**Tuesday, September 13, 2022, 11:15 a.m. – 12:30 p.m.**

**Room:** Heritage Hall in the HUB-Robeson Center and via Zoom [https://psu.zoom.us/j/92989520449](https://psu.zoom.us/j/92989520449) (see details on the next page)

**Agenda of the meeting:**

I.   Call to Order  
II.  Announcements  
III. Committee Reports  
IV. Other Items of Concern/New Business  
V.  Adjournment  
VI.  Lunch

A Box Lunch from Panera Bread is provided for in-person attendees following this meeting in the same room. If you are going to be there in person, please respond to the survey request sent from Sarah Silverman on Wed 8/24/2022 10:09 a.m. with your lunch selection.

**Lunch Survey:** [https://forms.gle/nU1TPpNYZNPFiwS18](https://forms.gle/nU1TPpNYZNPFiwS18) due by noon Friday, Sept. 2, 2022.
Zoom Connectivity Information:
Join from PC, Mac, Linux, iOS, or Android: https://psu.zoom.us/j/92989520449
Or iPhone one-tap (US Toll): +16468769923,92989520449# or +13017158592,92989520449#
Or Telephone:
Dial:
+1 646 876 9923 (US Toll)
+1 301 715 8592 (US Toll)
+1 312 626 6799 (US Toll)
+1 669 900 6833 (US Toll)
+1 253 215 8782 (US Toll)
+1 346 248 7799 (US Toll)
Meeting ID: 929 8952 0449

We are looking forward to seeing you on September 12 and 13.
Best Wishes,
Judy Ozment and Roger Egolf