

First Progress Report  
on the Unification of  
Castleton University, Northern Vermont University and  
Vermont Technical College  
as

Vermont State University

September 1<sup>st</sup>, 2022

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## Introduction

On April 22, 2022, the Commission took action to accept a substantive change proposal from the Vermont State Colleges System (System) to unify Castleton University, Northern Vermont University (with two campuses, Johnson and Lyndon), and Vermont Technical College (also with two primary campuses, Randolph Center and Williston) into one institution, **Vermont State University effective July 1, 2023**, and advised the system to proceed with its plans. The Commission further approved the system's request that the inaugural president of Vermont State University serve as president for each of the three institutions during the 2022-2023 academic year. Vermont State University, contingent upon the Commission's determination that the plans outlined in the substantive change proposal have been successfully implemented, will launch and welcome its first students on July 1, 2023.

This is the first progress report requested by the Commission to document the goals and tasks achieved in the transformation to create **Vermont State University (VTSU)**, per the Commission's June 17, 2022 letter to System Chancellor Sophie Zdatny. The Commission specifically requested updates on 1) **"enrollment and budget projections of VTSU and progress towards eliminating the System's structural deficit and achieving the anticipated \$25 million in structural savings,"** and 2) **"the development of a hybrid operational model for VTSU."** The Commission further requested evidence of the System's success in achieving specific goals and tasks specified for Spring and Summer 2022 in the substantive change proposal; these are enumerated in the report below.

## Institutional Update

Significant work has been accomplished this past spring and summer since the Commission's acceptance of the substantive change proposal. The Vermont State University brand and website launch took place May 17, 2022.<sup>1</sup> On June 9, 2022, Vermont State University Leadership positions were posted.<sup>2</sup> Dr. Parwinder Grewal began his position as President of Vermont State University on July 1, 2022. Senior leaders of each of our three existing institutions are now serving dual appointments as Executive Directors with responsibilities delegated by President Grewal to address logistical and operations issues specific to each institution, as well as providing institutional knowledge. With ultimate direction from President Grewal, the cross-institution transformation teams established last year to guide and develop designs for Vermont State University are now being transitioned to new structures aligned with the leadership and administrative organizational structure for Vermont State University and led by individuals appointed to interim or permanent positions.

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<sup>1</sup> <https://www.vsc.edu/press-release-vermont-state-university-unveils-new-unified-brand-identity-logo/>

<sup>2</sup> <https://transformation.vsc.edu/vtsu-leadership-job-postings/>

## 1. Budget and Enrollment Projections for VTSU and Progress Toward Eliminating the System's Structural Deficit and Achieving the Anticipated \$25 Million in Structural Savings

### Budget Projections

The System received historic levels of funding from the Vermont Legislature for Fiscal Year 2023 (FY23). This included \$60.4 million, comprised of \$45.5 million in the system's annual base appropriation (an increase of \$10 million) and \$14.9 million in one-time bridge funding.<sup>3</sup> The approved base is \$5 million more than had been estimated as part of the substantive change proposal and is intended to partially offset the anticipated budget deficit in FY24, thereby reducing the amount of bridge funding that the system will seek.

The system's relationship with the state is strong and this historic increase provides assurance that the state will continue to honor the commitment established in the final report of the *Select Committee on the Future of Public Higher Education in Vermont* to increase the base appropriation and continue to provide bridge funding.

The pro-forma, multi-year budget provided as part of the substantive change request was intentionally conservative and assumed no increase in tuition and fees or other revenues, beyond the state appropriation. It also assumed that the volume and mix of students would remain the same over time, as would the volume and mix of residential students. In June 2022, the Board of Trustees approved a system-wide budget. As part of this process, a revised pro forma budget was developed to guide long range financial forecasting. The revised pro-forma shown here continues to be forecasted conservatively, especially for enrollments at its Northern Vermont University campuses at Johnson and Lyndon where a 10% decline in student revenue was anticipated. However, for this year (FY23) the member institutions of Vermont State University are currently forecasting enrollment approximately 5% higher than budget. Looking solely at tuition and fee revenue, this results in an increase of between \$3.2M and \$3.8M, depending on student mix, and would place Vermont State University in line with the pro-forma from the initial substantive change request. We look forward to providing more information regarding enrollment in our subsequent progress reports.

At its June 16, 2022 meeting, the Board of Trustees (Board) approved a System Annual Operating Budget of \$184.3 million, including the projected operating deficit net of base appropriation and bridge funding of \$1.1 million,<sup>4</sup> of which the combined FY23 budgets for Castleton University, Vermont Technical College, and Northern Vermont University represent \$153.8 million in expenses and a projected operating deficit of \$22.25M,<sup>5</sup> inclusive of state appropriation. After the application of current year bridge funding, \$5M in additional base (due to the accelerated base appropriation), the net deficit for FY23 is \$2.34M which will be funded entirely from prior year bridge funding.

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<sup>3</sup> <https://www.vsc.edu/press-release-vermont-legislature-commits-historic-funding-vermont-state-colleges/>

<sup>4</sup> <https://www.vsc.edu/wp-content/uploads/2022/06/Board-Materials-6-16-22-final.pdf>

<sup>5</sup> <https://www.vsc.edu/wp-content/uploads/2022/05/2022-05-23-F-and-F-Meeting-Materials-final.pdf>

**Vermont State University Multi-Year Pro-Forma**

<b>REVENUES</b>	<b>FY2023B</b>	<b>FY2024E</b>	<b>FY2025E</b>	<b>FY2026E</b>	<b>FY2027E</b>
Tuition & Fees	76,363	76,363	76,363	76,363	76,363
Net Room & Board	18,754	18,754	18,754	18,754	18,754
Sales & Services	2,355	3,251	3,251	3,251	3,251
Gifts	1,070	1,070	1,070	1,070	1,070
Other Revenue	555	555	555	555	555
<b>TOTAL REVENUES</b>	<b>99,097</b>	<b>99,993</b>	<b>99,993</b>	<b>99,993</b>	<b>99,993</b>
<b>EXPENSES</b>					
Salaries & Benefits	82,624	78,906	75,355	71,964	68,726
Services, Supplies, Travel	26,938	25,456	24,184	22,974	21,826
Scholarships	19,196	19,388	19,582	19,778	19,975
Utilities	7,531	7,606	7,682	7,759	7,837
Other Expenses	10	10	10	10	10
Debt Service	6,179	6,179	6,304	7,386	7,139
Chancellor's Office	8,412	8,664	8,924	9,192	9,468
Other Transfers	2,887	2,887	2,887	2,887	2,887
<b>TOTAL EXPENSES</b>	<b>153,777</b>	<b>149,097</b>	<b>144,928</b>	<b>141,950</b>	<b>137,867</b>
<b>NET REVENUES/(DEFICIT)</b>	<b>(54,680)</b>	<b>(49,104)</b>	<b>(44,935)</b>	<b>(41,957)</b>	<b>(37,874)</b>
<b>STATE FUNDS</b>					
Appropriation	32,435	35,394	37,333	37,333	37,333
CY Bridge Funding	14,900	11,500	10,000	5,000	
PY Bridge		2,500			
Additional Base	5,000				
<b>TOTAL STATE FUNDS</b>	<b>52,335</b>	<b>49,394</b>	<b>47,333</b>	<b>42,333</b>	<b>37,333</b>
<b>NET AFTER STATE FUND:</b>	<b>(2,345)</b>	<b>290</b>	<b>2,398</b>	<b>376</b>	<b>(541)</b>

In future years, the projected net results vary from the original pro-forma due largely to the more conservative student tuition and fees revenue forecast. However, Vermont State University will have a balanced budget by FY27.

### [Enrollment Projections](#)

At this point in time, final enrollments for FY23 at the three institutions forming VTSU are projected to be approximately 5% better than the FY23 budget. This is favorable news, especially for some locations of Vermont State University which currently are forecasted at 10% better than budget. Work on a high-level strategic enrollment plan as detailed below in Standard 2 is nearly complete and will guide any additional FY23 operational adjustments as well as longer-term strategies.

### Progress Towards Eliminating the System's Structural Deficit

The current pro-forma budget for VTSU assumes flat revenue of \$99.9 million through FY27, with expenses decreasing from \$153.8 million in FY23 to \$137.1 million in FY27. During this same period, the institution's base appropriation is expected to increase from the currently budgeted \$32.4M to \$37.3M. The absolute value of this change is likely to differ in future projections as the Vermont State Colleges System is undergoing transformation regarding the allocation of shared expenses, shared revenues, and the base appropriation. While this work is ongoing, it is currently presumed that the net of all expenses and revenues in this category will remain approximately the same.

The system's structural deficit is largely comprised almost wholly of deficits at Vermont State University, with lesser amounts attributed to other parts of the organization. The total system budget for FY23 approved by the Board represents a nearly \$7M reduction in the structural deficit for FY23 when taking into consideration the waterfall effect of wage increases, estimated at 5%, and medical insurance increases, estimated at approximately 10.5%.

The system used the same pro-forma process as presented above for the VTSU projections to update the system-wide projection, now using the FY23 approved budget as a starting point. Compared to the multi-year estimate using the FY22 budget, the Vermont State Colleges System will, as a whole, achieve a balanced budget by FY2027.

Multi-Year Estimate Using FY2023 Budget Proposal					
	FY2023	FY2024E	FY2025E	FY2026E	FY2027E
<b>TOTAL REVENUES</b>	163,300	166,863	169,363	169,363	169,363
<b>TOTAL EXPENSES</b>	184,278	179,875	176,558	171,770	167,274
<b>NET REVENUES/(DEFICIT)</b>	(20,978)	(13,012)	(7,196)	(2,407)	2,089
Multi-Year Estimate using FY2022	(22,451)	(13,002)	(7,141)	(2,307)	2,234
<b>Net Forecast Change</b>	1,473	(10)	(55)	(100)	(145)

## 2. Development of a Hybrid Operational Model for VTSU

The arrival of President Grewal on July 1, 2022, and the launch of the VTSU brand is invigorating internal and external discussions about the nature of VTSU as a hybrid university. Faculty have continued working on detailed curriculum development work through the spring and summer to support the delivery of a single optimized program array using multiple modalities. This work has included completing revised course descriptions for formerly duplicative courses that will now be shared across programs and/or locations, identifying delivery modalities possible for individual courses, and drafting four-year program curriculum maps with projected delivery modalities available.

The guiding direction to all teams working on the design of Vermont State University as a hybrid institution, grounded in its mission, is to serve “all students, in all locations, and all modalities.” In practice, this has now been clarified to mean Vermont State University's operations will utilize three primary modalities for interaction: in-person, synchronous remote, and asynchronous remote. To realize this commitment inclusively and equitably, VTSU's operations

must be designed on a universal, shared foundation of technology tools and practices used by all students, faculty, and staff.

A critical insight emerging this summer from faculty involved in a “Face to Face Plus (F2F+)” pilot project and the Teaching & Learning Innovation team is based on the principle of Universal Design for accessibility, namely that this shared foundation must be established in a way that is inclusive of students with the greatest access challenges. Technology tools and practices that support online, remote and asynchronous access will therefore provide the most important part of this shared foundation for VTSU’s hybrid operations. After an intensive review and testing of a variety of technologies and practices that broadly fall into “classroom-first” versus “online-first” strategies, teams responsible for designing hybrid operational strategies for their functional areas have affirmed the benefits of a potential 1:1 device technology approach for VTSU. This approach supports “online-first” as the most robust universal design strategy for the university’s hybrid operations.

As faculty involved in the F2F+ pilot project have begun to define it, an “online first” approach to all courses offered in all locations and modalities would utilize the learning management system (Canvas) as a home base, where faculty present, organize, and deliver the course in a consistent way; web applications (*e.g.* Perusall, Nearpod, Miro) that create opportunities for engagement for students both in class and collaborating outside of class; and for all students, including those who attend classes in a physical classroom, to use the same Zoom-equipped devices at their tables. This usage enables all participants to be visible and on a “level ground” in the electronic meeting.

The common 1:1 device kit piloted this summer includes an iPad to provide potential cellular access to mitigate the challenges some of our rural, remote students face in accessing broadband internet. It also includes earbuds, a pencil for annotation, and a keyboard. Use of earbuds with a personal camera-equipped device such as the iPad assures that students accessing courses remotely will have the same audio quality (to hear and be heard by all individuals in the course, whether they are attending in-person or remotely), visibility (avoiding too-small visual images of live faculty demonstrations captured from one or two fixed cameras), and opportunities for full engagement with all classmates in small-group discussions (for example, in Zoom breakout rooms, and using a common set of collaboration apps) as their in-classroom peers.

Remote students must also be able to access specialized software used in a course. Through the pandemic and emergency pivots to remote learning, it has been challenging for IT to provide students with remote connections to specialized software installed on classroom computer labs (part of existing institutions’ “classroom-first” IT strategy). The IT Team has now determined that providing a remote, web-based solution to virtual software will be a better and more cost-effective approach. This approach is also consistent with and complementary to a 1:1 device strategy.

The work to identify, test, and launch use of other existing, as well as new, technology tools consistent with an “online first” design that can meet the needs of VTSU’s hybrid operational model is now underway. For example, this fall several teams will be piloting the use of a single



web-based appointment scheduling tool that can serve all prospective and current students to make appointments with faculty, staff, and support services offices across the university. The Career Services team is developing a common set of digital learning modules for ten essential career development tasks. The Admissions team has designed a single web-based admissions process. All teams utilizing forms for the collection and processing of information are in the process of converting those into digital, web-accessible documents.

Currently, implementation plans for faculty and staff professional development, IT support, and a financial analysis are under review by VTSU and system leadership with the goal of making a final determination on an overall technology strategy by the end of October.

### 3. Evidence of Success in Achieving Goals and Tasks Specified for Spring 2022 and Summer 2022

#### Standard One: Mission and Purposes

##### VTSU Policies and Programs Reviewed for Alignment with the Mission and Vision

Teams and sub-teams are required to complete and present summaries of their work at each stage in the project management process. These summaries include documented alignment of the project's design principles and deliverables to VTSU's Mission & Vision, as well as three pillars defining diversity, equity, and inclusion efforts (personal knowledge, professional knowledge, and data informed practices). These summaries and associated project presentations are shared broadly to ensure the mission and vision are not just built into VTSU policies and programs emerging from transformation projects, but widely understood by administration, faculty, and staff.

#### Standard Two: Planning and Evaluation

##### High-level Financial, Facilities, and Enrollment Plans Completed

As documented in the substantive change proposal, high-level financial and facilities plans were presented to the Board for review in October 2021<sup>6</sup> and February 2022<sup>7</sup> respectively. These plans informed the setting of FY23 budgets, inclusive of a deficit reduction target for FY23, a revised multi-year projection, and FY23 capital expenditures approved by the Board on June 16, 2022<sup>8</sup>

Work is now nearly complete on a high-level enrollment plan for Vermont State University to be implemented in two phases. That plan identifies the following major factors in the enrollment declines experienced by all three institutions:

- Heavy reliance upon recruiting traditional-aged students from Vermont and neighboring states where the demographics show significant declines in the number of high school graduates.

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<sup>6</sup> <https://www.vsc.edu/wp-content/uploads/2021/10/BOT-Materials-10-25-21-final.pdf>

<sup>7</sup> <https://www.vsc.edu/wp-content/uploads/2022/02/BOT-2-14-22-materials-final.pdf>

<sup>8</sup> <https://www.vsc.edu/wp-content/uploads/2022/08/2022-6-16-Board-of-Trustees-Minutes-APPROVED.pdf>

- Limited emphasis, primarily due to a lack of resources, placed on recruiting other prospective student populations.
- Missed opportunities to better align recruitment activities with the efforts of the workforce development initiatives happening across Vermont.
- Academic program delivery models not yet meeting the needs of a broader prospective student population (*i.e.* insufficient online courses, distance/remote education, evening/weekend course offerings).
- Mounting pressure from neighboring states to offer tuition/scholarship incentives to keep their own students in state and attract Vermonters to cross the border.

With these factors in mind, the enrollment plan calls for a series of institutional commitments that support enrollment growth, to be pursued in two phases. These commitments have been identified as being critical to the success of VTSU's enrollment plans, by upholding the mission and vision of the university, by centering diversity, equity, and inclusion, and by improving accessibility.

Phase 1 of the plan calls for immediate implementation of four commitments to address these factors consistent with VTSU's mission and vision. The focus of ongoing enrollment planning for FY24 within these commitments will be on five objectives that build on the strengths of each institution's past enrollment initiatives and the optimized academic programs of the hybrid university to position Vermont State University for the best chances of enrollment success in the coming years. For example, the first objective is to increase the enrollment of non-traditional/adult students. One strategy to do this is by improving the relationship of admissions and workforce development teams so that they better align on the recruitment efforts of working adults. Another example is increasing the enrollment of transfer students. This will be accomplished through strategies such as positioning VTSU as the destination university for Community College of Vermont graduates and updating transfer pathways for existing partner institutions to VTSU curriculum.

These commitments, including those currently identified as potential commitments for Phase 2, will also provide a critical input to the development of Vermont State University's first strategic plan. With completion of VTSU's strategic plan and refinement of these commitments during the coming year, detailed enrollment planning for FY25 will begin in Fall 2023.

<b>Draft Institutional Commitments to Support Enrollment</b>		
<b>Commitment (Phase 1)</b>	<b>1</b>	<b>Improve Retention/Persistence/Graduation Rates</b>
	1.1	VTSU has an overarching commitment to student-centered service
	1.2	Implement new advising model
	1.3	Offer more transitional support to underprepared students
	1.4	Ensure university departments are staffed at levels that are conducive to student success
<b>Commitment (Phase 1)</b>	<b>2</b>	<b>Alignment of Costs and Financial Aid to Support Enrollment, with a Focus on Affordability</b>

	2.1	Set cost of attendance parameters in line with the student experience
	2.2	Establish consistent tuition and fee rates across all VTSU locations
	2.3	Utilize merit and need based institutional aid awarding strategies to attract diverse populations of students
<b>Commitment (Phase 1)</b>	<b>3</b>	<b>Expand Remote Access/Online Program Offerings</b>
	3.1	Offer more evening and weekend courses
	3.2	Offer more online/remote access programs
	3.3	Align the timing/frequency of course offerings with demand
	3.4	Offer more certificate/stackable credentials to meet the needs of regional employers.
	3.5	Provide expanded opportunities for degree completion candidates
	3.6	Create new graduate and undergraduate online degree programs
	3.7	Increase summer and Jan term general education course offerings
<b>Commitment (Phase 1)</b>	<b>4</b>	<b>Diversity, Equity, and Inclusion are Institutional Priorities for Vermont State University</b>
<b>Commitment (Phase 2)</b>	<b>5</b>	<b>Expand Geographic Recruitment Area</b>
	5.1	Identify new states to focus recruitment efforts in and begin building brand awareness
	5.2	Build an international student recruitment strategy with the new Vermont State University brand and expanded academic program offerings
<b>Commitment (Phase 2)</b>	<b>6</b>	<b>Encourage/Empower Alumni, Faculty, Staff, and Students to be More Involved in Recruitment through the creation of Vermont State University Ambassador Program</b>
	6.1	Educate these groups on the admissions process from start to finish
	6.2	Conduct a series of trainings
	6.3	Recruit/Create a database of willing ambassadors to call on for support and assistance

The high-level enrollment plan, currently in final draft form pending President Grewal's approval, will be presented to the Board on September 20-21, 2022, at the Board's annual retreat. The plan calls for the president to appoint members to serve on an enrollment advisory board for the university. This board will be comprised of faculty, staff, students, administrators and possibly community leaders. The board will be chaired by the vice president of admissions and enrollment services and will meet frequently to advise and receive updates on the execution of the plan.

The plan also establishes the following key performance indicators to be assessed on an annual or semi-annual basis. These metrics will ensure VTSU's future enrollment goals are realistic, consistent with its mission, and broadly representative of the population it intends to serve.

1) overall enrollment

- 2) resident student enrollments
- 3) online/remote access course enrollments
- 4) measures of diversity, equity, and inclusion
- 5) strength of Vermont State University brand (visibility/institutional awareness)
- 6) admission funnel data
- 7) academic preparedness
- 8) tuition revenue/discount strategy/net price
- 9) target grants and scholarships (merit and need-based)
- 10) continuation rates and outcomes

### [A Director of Institutional Research and Strategic Planning Has Been Hired](#)

The Director of Institutional Research & Planning position was first posted internally in June, per new recruitment and selection procedures guiding the implementation of VTSU's new leadership structure, and subsequently was posted externally. A search committee has been convened to review applications and conduct interviews and projects making its recommendations to President Grewal by early September.

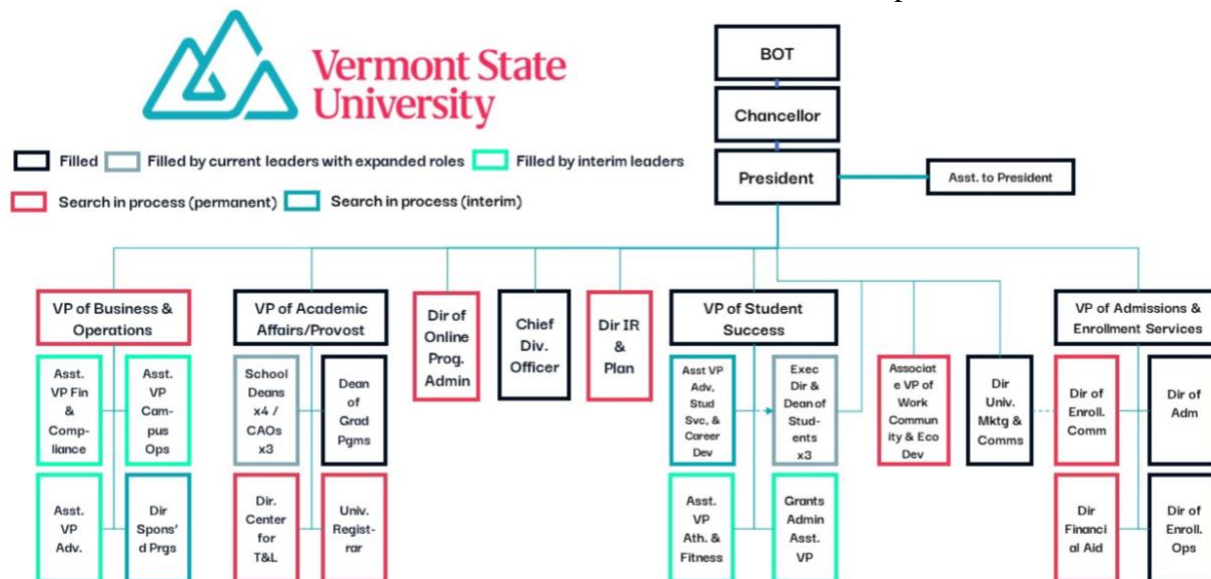
## [Standard Three: Organization and Governance](#)

### [VTSU President Has Taken Office](#)

On July 1, 2022, Dr. Parwinder Grewal assumed the presidencies of Castleton University, Northern Vermont University, and Vermont Technical College, as well as his role as the inaugural president of Vermont State University. He reports to the Chancellor of the Vermont State College system, Sophie Zdatny, who reports to the Board of Trustees. With President Grewal's arrival, the implementation of the leadership structure for Vermont State University is being transitioned to his direct oversight with ongoing support and consultation from transformation teams and subteams.

## VTSU Leadership Structure is Being Implemented

The new leadership structure, finalized by President Grewal upon his arrival in July 2022, provides unified leadership capacity that will meet the mission, vision, and purpose of VTSU. This new structure, together with posting principles and the procedures for filling positions, was originally announced in draft form to all faculty and staff on June 1, 2022. The current structure and status of positions is outlined in Figure 1 below. As seen in Figure 1, some time-sensitive and transitional interim positions have been filled by internal leaders appointed via an abbreviated process. As senior positions are filled, interim positions reporting up to those new senior leaders will be defined in final form and searches launched for permanent candidates.



As outlined and accepted in the substantive change request, until the new university is fully launched on July 1, 2023, Dr. Grewal will be serving as president of Castleton University, Northern Vermont University, and Vermont Technical College as the three institutions prepare for the launch. Executive Directors for all five campuses have been appointed, who are taking on this role in addition to their existing responsibilities at each of the three institutions. The Executive Director role is intended to assist Dr. Grewal by addressing logistical and operational issues that may arise on the campuses, as well as providing him with the benefit of their institutional knowledge. President Grewal is based on the Randolph campus, which is the most centrally located campus, with no other campus more than an hour and a half away by car. Similarly, the position of Provost and Vice President of Academic Affairs for Vermont State University, is filled by Dr. Nolan Atkins, who concurrently is serving as Provost and Chief Academic Officer for Northern Vermont University this year. Chief Academic Officers for Vermont Technical College and Castleton University are responsible directly to President Grewal on academic matters pertaining to their respective institutions this year while Interim School Deans are responsible to VTSU's Provost on matters pertaining to the implementation of the unified academic organizational model for VTSU.

Two additional key roles reflected in this final leadership structure have been created to support and further VTSU's mission and vision as a community engaged, regional public university. One

is a Director of University Marketing and Communications, which will also support work in Admissions and Enrollment Marketing. The other is an Associate Vice President of Workforce, Community, and Economic Development, to assist in integrating workforce, community and economic development activities into the curriculum and building and strengthening VTSU's relationships with other organizations and Vermont communities. Vice President of Student Success has also been identified as a key senior leadership role to serve students throughout their time at Vermont State and improve student retention by leading coordinated efforts across the institution, and specifically within the areas of student life, academic advising and support, athletics, and federal grant programs that contribute significantly to student success from matriculation through graduation.

This unified VTSU leadership structure, while creating some new positions, also replaces roles once duplicated at each institution with single leadership positions. To date, positions have been filled with internal candidates. Two positions are currently posted both internally and externally: the Vice President of Business Operations and the Director of Institutional Research and Planning. As positions are filled, this information is shared with the VTSU community. In addition, the bi-weekly transformation updates include hiring information and an updated organizational chart for VTSU.

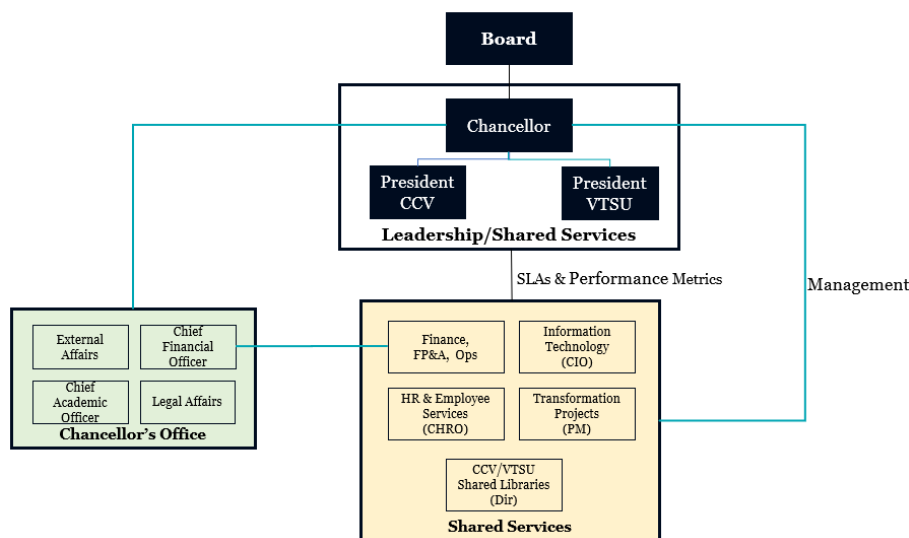
#### [Academic Organization Structure Design Completed](#)

In April 2022, Faculty Assemblies on all campuses approved an academic organizational structure with five cross-campus schools, 15 cross-campus departments, and a graduate programs unit as projected in the substantive change proposal and aligned with the proposed academic program array. This academic organizational structure is now supported by administrative leaders, appointed to interim positions as school deans responsible to VTSU's Provost and Chief Academic Officer, for the coming academic year.

#### [Administrative Leadership Structure Design Completed](#)

As outlined in the substantive change request, one of the Vermont State College System's strategies to achieve financial sustainability is to consolidate administrative services across the system. This will be achieved by having specific shared service models for IT, Finance, HR, and Library services. These departments will report to the Leadership/Shared Services Council, which has now been defined to include the President of VTSU, the President of CCV, and the Chancellor as outlined below.

## Vermont State Colleges Shared Services



At the system's Board of Trustee's meeting on May 16, 2022, the following shared services model definition was approved for the system.<sup>9</sup> As approved by the Board, these shared services are:

- Distinct from the “central office,” with services and support provided by employees distributed across the state;
- Accountable to the organizations it serves (Council of Presidents, Advisory Board, other shared service units);
- Able to gain economies of scale and more specialized knowledge and capacity in specific technical functions;
- Focused on the processes, systems, and data needed to ensure the intended outcomes – consistent where possible, but unique as required;
- Defined by Service Level Agreements that articulate details of shared accountability and measures between the functional leaders and the shared service organization; and
- Oriented to a customer service approach with customers defined as students, faculty, and staff.

Information Technology is the first department that is transitioning into the shared service model, with a design strategy, service areas, and timeline presented and approved by the Board on June 16, 2022. Job descriptions for leadership positions within the IT department have been created and the recruitment process has been launched. This fall, service level agreements will be negotiated and the development of the full staffing plan for each service area under the shared service model for IT will be completed, so that in the first quarter of 2023 IT shared services

<sup>9</sup> <https://www.vsc.edu/wp-content/uploads/2022/06/2022-5-16-Board-of-Trustees-Minutes-APPROVED.pdf>



structure can be launched and work on the priorities outlined in the strategic roadmap, described below in Standard 7, can begin.

Other areas identified for Shared Services including Human Resources and Libraries are also proceeding with planning. As of August 18th, the Chancellor, Presidents, and stakeholders including the Executive Director of Workforce Development, Director of Transformation Projects, CHRO, CFO/COO, CIO, and CAO will meet regularly to continue to move this work forward.

Common meetings times for Faculty Assembly and Curriculum Committee Chairs have been determined, and a “statement of values” has been established

A common master meeting schedule for faculty across the three institutions has been established for the fall. This meeting schedule sets common monthly meeting times for the four individual Faculty Assemblies, Curriculum Committees, Department Chairs, the executive and constituent committees of each Faculty Assembly, and academic departments. A common monthly meeting time for the Faculty Federation bargaining unit is also included in the master calendar. The calendar also establishes a common weekly joint meeting time for Curriculum Committee Chairs and Faculty Assembly leaders, and a common weekly “Town Hall Zoom” meeting time for the VTSU community at large.

The substantive change proposal anticipated creation of a “statement of values” that establish expectations and processes to guide responsible and ethical actions of faculty and staff consistent with VTSU’s mission and commitment to diversity, equity, and inclusion. We noted that this work would be led by the VTSU President during the 2022-2023 academic year. Among President Grewal’s first efforts since he began his role on July 1, 2022 has been to meet with faculty and staff across all campus locations and to appoint VTSU’s Chief Diversity Officer, who will support development of this statement of values.

## Standard Four: The Academic Program

### Unified Curriculum Review Process Underway

In preparation for a unified review of academic programs to be offered at Vermont State University, a common rubric has been designed by Curriculum Committee (CC) chairs and was approved by the CCs earlier this spring. This rubric, together with a common set of program and course information forms, was shared with faculty along with a proposed review schedule for the fall. Over the summer, CC chairs and representatives have met to conduct a first “trial” review with a sample of programs and have previewed materials for 26 of the 101 programs to confirm they are ready for review. The remainder of programs have been identified for review either in early fall, pending CC confirmation, or late fall, in the case of 36 high-credit, highly structured technical programs, which must first complete integration of new general education program requirements.

### Design and Faculty Review of the General Education Program Underway

Following initial review of the conceptual design of VTSU’s Connections General Education program by all Faculty Assemblies in late spring, the General Education working group has



continued to develop the program design details. The working group is made up of individual institution general education committee chairs or designated representatives. The work that has taken place over the summer includes a proposed set of learning outcomes for each of the three integrative Connections Seminars and a conceptual proposal for portfolio-based assessment (described in detail below in Standard 8).

An early concern identified by Vermont Technical College faculty has been the need for multiple and flexible options for programs, particularly high credit, highly structured (“stacked”) associate degree programs such as nursing and engineering technology. The flexibility would be to ensure these programs can achieve the learning outcomes encompassed in the Connections Seminars. As part of the work this summer, members of the General Education working group have partnered with faculty to identify potential approaches to the integration of the General Education program into such programs. The current plan is for these approaches to be documented and confirmed by the General Education working group prior to the program review process by curriculum committees and Faculty Assemblies scheduled for these programs later in the fall.

#### Progress has Been Made to move Specialized Accreditations to VTSU

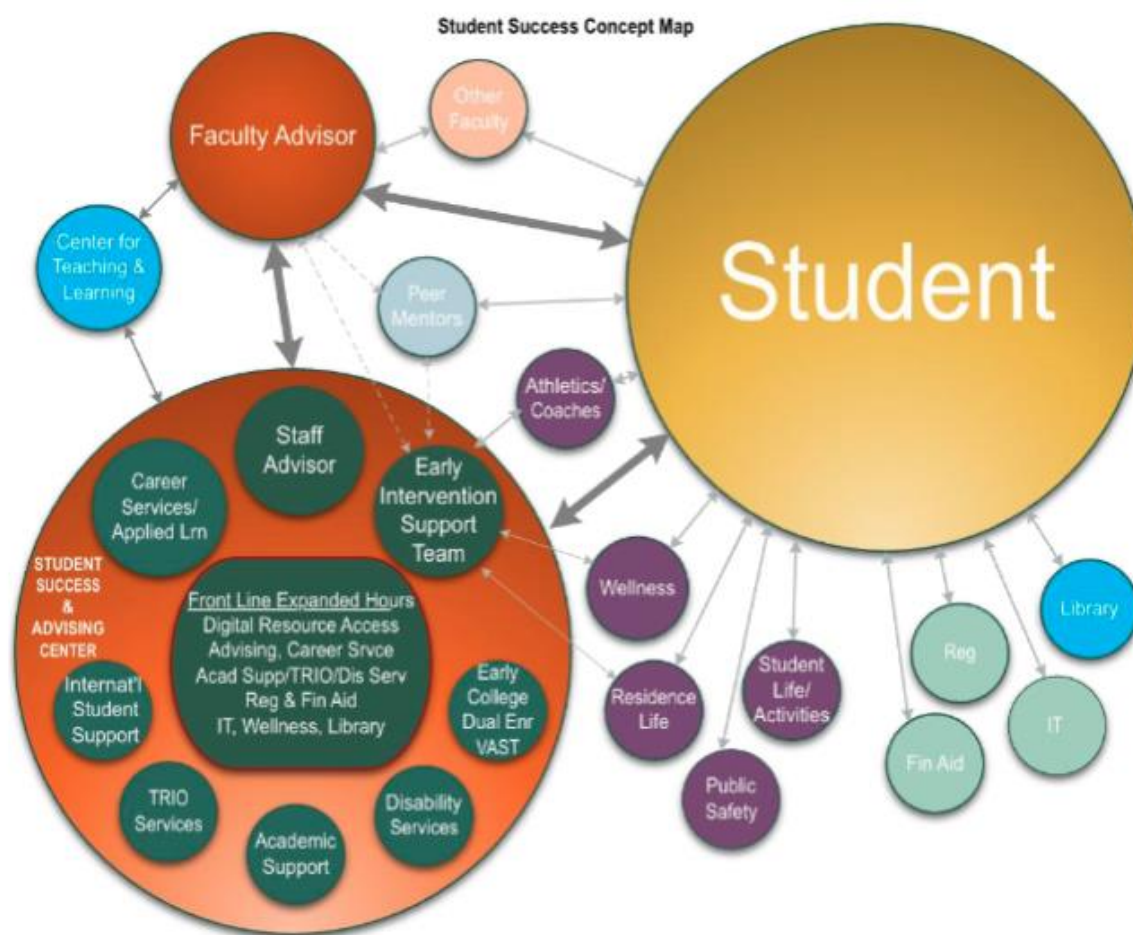
Vermont State University will offer a variety of programs with specialized accreditations. In some programs (nursing, social work, dental hygiene), the projected changes to programs with these accreditations will be minimal, namely that a modest proportion (25%) of program courses are projected to be offered via distance learning, and program coordinators are in the process of seeking guidance as to whether such changes are considered by the specialized accreditor to require approval as a substantive change. For some programs (education, exercise science), a program with specialized accreditation at one campus will be expanded with the same curriculum to additional campus locations, also with modest proportions of distance learning courses to be offered; these programs are also in the process of obtaining guidance on the substantive change process. Programs currently offered at Vermont Technical College that are accredited by the Accreditation Board for Engineering Technology (ABET) are currently projected to have changes limited to the incorporation of VTSU general education program requirements and are in the process of identifying specific course revisions needed to incorporate those requirements prior to seeking guidance from ABET on potential substantive change requirements.

### Standard Five: Students

#### “Digital First” and “One Stop” Approach to Advising, Career Services, and Other Student Supports Are Being Designed

Initial designs for a new advising model and an embedded career development program that will serve all students in all locations and modalities have been completed and work is underway to develop digital-first resources and implementation plans. The advising model includes an assigned faculty and staff advisor for each student and envisions establishing a single, digital-first point of access to resources, as well as a concierge/triage role. The designs incorporate a progression of skills, academic planning, and career development tasks with the faculty and staff

advisors providing students with holistic support as they navigate their unique path to success. For example, one of the roles of the staff advisor will be to introduce first-year students to degree program maps, the general education program, university course offerings, and the course registration process, while one of the faculty roles will be to support integration of the advisee's goals and learning by making connections to program-related experiential learning opportunities. The advising model will utilize web-based functions and tools for services represented by dark and light green circles shown on the concept map below.



### Program-Specific Admission Requirements are Determined

Program-specific admissions requirements for Vermont State University have been determined to remain the same as they are now for programs currently offered by each of the three institutions. Admission requirements for all other programs will use the same general admission requirements set forth in VSC Policy 303: *Admissions and Transfer of Credit*.<sup>10</sup> Program-specific requirements will be communicated to students on the website and through their personalized checklist in the applicant portal and published in the academic catalog. Completed applications to these programs will be reviewed by an admissions committee initially and some will include

<sup>10</sup> <https://www.vsc.edu/wp-content/uploads/2016/10/Policy-303-Admissions-and-Transfer-of-Credit.pdf>

faculty review with the final recommendation going to the director of admissions and/or appropriate program director.

## Standard Six: Teaching, Learning, and Scholarship

### Faculty Development Plan for Multi-modality Delivery is Being Implemented

As part of the progress towards creating a hybrid university, work has continued in developing a multi-modal course delivery approach for VTSU. This work has been led by the Teaching & Learning Innovation (TLI) team, who were charged with the goal of developing plans to support quality delivery, student success, innovative, and accessible pedagogies for different modalities of teaching and learning. This summer the team launched a year-long “Face to Face Plus (F2F+) Faculty Development” pilot with three goals: to support a core group of faculty across the range of academic disciplines to pilot new tools, software, and course designs for hybrid delivery; to evaluate effectiveness; and to establish a new foundation of faculty-recommended best practices for quality delivery.

This work will establish a foundation of best practices, including the creation of sustainable, ongoing professional development for faculty at Vermont State University. The 27 faculty participating in the F2F+ pilot are a diverse and broadly representative group (all institutions, campuses, and schools) and will be serving as peer mentors to their colleagues over the next several semesters as the pool of courses and faculty incorporating best-practice strategies in delivering F2F+ courses expands. Given the strong initial interest in the pilot (over 45 faculty expressed interest), other interested faculty have been invited to join professional development workshops connected to the pilot. Feedback from all participating faculty will inform subsequent refinement of VTSU’s long-term approach to faculty development via its Center for Teaching and Learning.

### System-wide Library Staffing Model Has Been Established

On June 15, 2022, the libraries transformation team presented its design for digital-first library services with a single library serving the system, including both VTSU and the Community College of Vermont. The design vision calls for a transformation that includes:

- Focusing library collections on relevant, balanced resources aligned with academic programs, with a preference for selection of digital over physical materials;
- Structuring the professional librarians to work as program liaisons offering resources and services to meet the needs of programs, including incorporation of Open Educational Resources content and digital synchronous instruction and reference services (*i.e.* use of chat, Zoom, and digital learning objects embedded in courses); and
- Fully integrating self-services and asynchronous instructional resources into the library, via a new library website, to make these available 24/7/365.

As some of these changes will require transitional work, particularly the work needed to transform the physical collection, analysis is ongoing to determine staffing for this dimension of library operations. Other components of the library staffing model have been identified in the design. These include dedicated professional librarian positions for the Community College of

Vermont and VTSU that will have liaison responsibilities to specific academic programs, and specialized positions that will support the digital-first library, namely a Web Services Librarian and Electronic Resources Management Librarian.

### Staffing Model for all Academic Functional Areas Established

As with all functional areas for VTSU, the development of new staffing models is now proceeding beginning with the implementation of the new leadership structure detailed above. As new leaders are appointed, they in turn will be working to establish staffing structures informed by the specific functional-area designs (*e.g.* advising, academic support, disability services, career services, teaching and learning) proposed by transformation teams. This work has now been prioritized based on the specific timeline requirements for each functional area. For example, the admissions functional area has been prioritized for the appointment of permanent director positions and staffing models underneath each of those divisions so that a fully staffed admissions team will be in place to begin recruitment of VTSU's first incoming class in early fall. The next overall priority area for VTSU is academic affairs, with a target date of mid-fall for completion of staffing plans and early spring for staffing appointments to be completed.

## Standard Seven: Institutional Resources

### VTSU Tuition and Fees for AY2024 are Set

At its August 22, 2022 meeting, the Board's Finance and Facilities Committee reviewed design principles and conceptual models for VTSU's tuition and fees for Fall 2023. These principles included:

1. Pricing must be easy for the consumer to understand and efficient to implement within VSCS computer systems;
2. Base tuition must be consistent across all programs and campuses with separate program fees to support differentiation for programs requiring greater faculty to student contact, and/or equipment needs;
3. Discounts must drive student affordability, enrollment, financial sustainability, and student persistence;
4. Any change in tuition should be more competitive and generate "buzz" and new enrollments;
5. Institutional aid and scholarships should be used strategically to address recruitment and retention;
6. Out-of-state pricing should be normalized to reduce discounting while generating new student interest and increasing net student revenue; and
7. Selected pricing model must be financially viable and fiscally sustainable.

The VTSU leadership team will use the Committee's advice and input to develop and analyze a final tuition and discounting model that will be brought to the full Board for approval at its September 21, 2022 meeting.

### 10-year Strategic Facilities Plan for VSU Approved

Vermont's Act 74 of 2021 required the System's Board to develop and implement a 10-year strategic plan for managing its physical assets that is fiscally sustainable, maintains reasonable

net asset value, and meets the needs of Vermont learners. A high-level 10-year plan was approved by the Board at its February 14, 2022 meeting.<sup>11</sup> The plan outlined key findings related to excess capacity and deferred maintenance and set an overall target of a 25% reduction in physical space to align current and projected needs of VTSU as a hybrid institution with its physical infrastructure to ensure a more equitable, accessible, and financially stable institution.

#### Phase I of the VSU Facilities Divestment has been Launched

Phase 1 of the plan to achieve the 25% reduction in space calls for a focus on properties that do not have a current academic or programmatic use. Facilities staff and leadership are currently developing a list of these properties, which will then be investigated for potential divestment, lease, or removal. The Facilities Planning team has engaged civil and mechanical engineers to finalize the work of isolating key parcels. Additionally, the team has issued a request for proposal to price selected properties and consider them for sale. Further, Gordian (formerly Sightlines) has begun the critical work of updating and refreshing Vermont State University's *Return on Physical Assets* (ROPA) study in advance of selecting additional projects for divestment or consolidation. Lastly, a request for proposal will be issued in the first quarter of 2023 for a master planning effort.

#### System Chief Human Resources Officer Hired

A Chief Human Resources Officer (CHRO) for the System has been appointed and began in the role on May 2, 2022. Among the CHRO's first actions was to establish a new single Recruitment and Hiring Procedure for the System, implemented at the beginning of June, that furthers the VSC's commitment to Diversity, Equity, and Inclusion. The CHRO is providing detailed guidance for the implementation of VTSU's new leadership structure and the filling of interim and permanent positions and is leading a team charged with developing the system's HR and Employee Services function as a system shared service as described in Standard 3 above.

#### VTSU's Beta Learning Environments Launched

As described above, as part of the development of a hybrid operational model for VTSU, the faculty involved in the F2F+ pilot this summer have begun to define an "online first" approach to all courses offered in all locations and modalities. Within this approach, several "beta environments" will be tested in courses being piloted by these faculty this fall. This includes five courses that will pilot the common 1:1 device kit with students, as well as courses, particularly science and technology courses with labs, that are testing new classroom-based hardware to support remote student access.

#### System-wide Strategic IT Roadmap Developed

At its June 16, 2022 meeting, the Board approved establishing Information Technology as one of the shared service administrative departments for the system. Since then, work has proceeded to develop the plan for the transition to a shared service model. The model addresses strategic IT needs for the system and those specific to VTSU as a hybrid, statewide institution, including strengthening opportunities for staff specialization and reallocating resources to understaffed and new service areas. The Information Technology strategic roadmap for this model seeks to be

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<sup>11</sup> <https://www.vsc.edu/wp-content/uploads/2022/02/2022-002-Approval-of-Ten-Year-Strategic-Facilities-Plan.pdf>



sustainable, with a focus on standardizing technology and systems, formalizing supports with increased accountability, and incorporating project management as a best practice. The roadmap defines the constituent service areas for IT (professional services, security, user services, infrastructure, enterprise applications, and teaching and learning) and associated projects for the next 3-5 years and identifies specific year 1 project priorities for each area.

## Standard Eight: Educational Effectiveness

### Portfolio Assessment Plan for General Education Program Designed

The “Connections” General Education Program proposal to be reviewed this fall by Faculty Assemblies incorporates the use of eportfolios as an integrative learning tool in its design. Specifically, the program requires three “Connections Seminars” at the bachelor’s degree level (two at the associates level) that define associated activities and outcomes through which students will develop integrative and reflective skills. Specific portfolio components identified in the design include exploratory engagement activities in the first seminar (*e.g.* students might include a reflection on a career interests and strengths self-assessment activity), a focus on reading and writing across the curriculum in the second seminar, and finally the collection of and reflection on artifacts produced in capstone courses and experiential learning opportunities in the third seminar. The proposal calls for development of a detailed program assessment plan including procedures for sampling portfolio artifacts and establishing an annual cycle of and rubrics for evaluation of artifacts by a general education faculty committee. Work to develop this detailed plan will continue through the academic year.

### Assessment Plan for Career Readiness and Post-Graduation Outcomes Designed

To date, the career services transformation team has developed an initial design for a comprehensive approach to assessing career readiness and post-graduation outcomes aligned with the planned approach to career development embedded in VTSU’s new advising model and proposed general education program. For example, the embedded career development program calls for students to complete ten “career development tasks” supported in the general education Connections seminars and by advisors; artifacts from these tasks included in the eportfolio will serve as the basis for assessing career readiness. Post-graduation success has been defined as “professional placement” including employment, service, and/or continuing education and will be assessed via a graduate survey.

## Standard Nine: Integrity, Transparency, and Public Disclosure

### VTSU Micro-Site Launched

On May 17, 2022, the VermontState.edu microsite was launched and over the next six months it will continue to be further populated with details on admissions, academics, and financial aid, as well as system-wide library and information technology resources offered. This microsite is operating in conjunction with the existing three institutional websites, which all provide clear information about the status of the transition and accreditation status. The VermontState.edu site provides information about the transformation to VTSU for external and current student audiences for informed decision-making. For internal audiences, especially staff and faculty, the

transformation microsite<sup>12</sup> continues to be maintained and regularly updated, especially the News and Updates section.

#### VSC System-Wide Diversity Statement Adopted

As anticipated in the substantive change proposal, at their May 16, 2022 meeting, the Board adopted a system-wide diversity statement.<sup>13</sup> The statement articulates a commitment to “nurturing a welcoming, diverse, and inclusive learning and working environment” and an aspiration “to ensure all our actions, policies, and operating procedures reflect this commitment.” The commitment is grounded in three pillars: personal knowledge, professional knowledge, and data informed practices, which are serving to guide ongoing transformation work for the system and VTSU.

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<sup>12</sup> <https://transformation.vsc.edu/>

<sup>13</sup> [2022-05-16 Board of Trustees Meeting Minutes APPROVED](#)