

September 17, 2014

MEMORANDUM

TO: State Board of Regents

FROM: David L. Buhler

SUBJECT: Revision of Policy R506, Inventory of Budget Related and Self Supporting Courses

Issue

Regent Policy R506, *Inventory of Budget Related and Self Supporting Courses*, has recently been reviewed by the Office of the Commissioner (OCHE) and Utah System of Higher Education (USHE) institutional representatives. This review is part of the continuing review of all Regent Policies.

Background

The amendments to R506 are largely technical, deleting outdated provisions and adding language to better conform to USHE's Data Dictionary. Staff at OCHE worked extensively with Institutional Research representatives and Budget Officers to update the policy. Technical and substantive revisions to policy R506, *Inventory of Budget Related and Self Supporting Courses*, include:

- **Sections throughout policy** – Updates references to course level, from 100 to 1000
- **Sections throughout policy** – Removes references to “remedial” courses, instead describing courses as above or below 1000 (as suggested by institutional research representatives)
- **Sections throughout policy** – Changes from “course is taught in Utah” to “course originates in Utah” to account for online courses
- **Sections throughout policy** – Adds clarification about where instruction is received; matches language in USHE's data dictionary
- **Sections throughout policy** – Moves conjunctions “AND” and “OR” to read in a more logical sequence
- **Section 4.2. and 5.2.** – Updates language related to concurrent enrollment courses to match language in USHE's data dictionary, removing references to where the course is taught
- **Section 4.3.** – Removes references to specific institutions, provides language consistent with R315
- **Section 4.5.** – Updates references to technical education, from “ATE” to “CTE”
- **Sections 4.5., 5.1.2., 5.4.** – Removes references to “ATCSR (Applied Technology Center Service Region) funding” as a funding source
- **Section 5.1.10.** – Added to account for new types of courses; matches language in USHE data dictionary

Commissioner's Recommendation

The Commissioner recommends that the Regents approve revisions to policy R506, *Inventory of Budget Related and Self Supporting Courses*, effective immediately.

David L. Buhler
Commissioner of Higher Education

DLB/GLS/BLS/AMN
Attachment

R506, Inventory of Budget Related and Self Supporting Courses¹

R506-1. Purpose: To provide guidance [and uniformity](#) to the categorization of courses as budget-related or self-supporting for state funding purposes.

R506-2. References

- 2.1. Utah Code [§53B-7-101](#) (Combined Requests for Appropriations - Appropriation Formulas)
- 2.2. Policy and Procedure [R501](#), Budgeting Definitions and Guidelines
- [2.3. Policy and Procedure R315, Service Area Designations and Coordination of Off-Campus Courses and Programs](#)
- ~~2.3~~ [2.4. Enrollment Category Decision Tree](#) ~~for Acrobat Reader~~

R506-3. Utah System of Higher Education Course Inventory

- 3.1. **Supervised Instruction:** For courses to be included in the USHE Course Inventory, instruction must occur and the institution must supervise the instruction.
- 3.2. **Separate Designation for Credit and Not for Credit Courses:** Whenever a specific course offering can be taken either for credit or not for credit, the different registration categories are to be provided by separate section numbers scheduled at the same time and location.

R506-4. Budget-Related Courses for State Funding Purposes

- 4.1. **Budget-Related Regular (BA):** (course must meet all of the following criteria)
 - Course is for credit.
 - Course is not offered at a high school site, or is offered at a high school site but is not a concurrent enrollment course.
 - Board approved tuition is assessed.
 - All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
 - Course ~~is taught~~ [originates](#) in Utah or [is taught](#) through study abroad.
 - Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
 - Course level is ~~100~~ [1000](#) or above (~~non-remedial~~)

[#AND# course must also meet one of the following sets of criteria](#)

- 4.1.1. ~~#AND# (course must also meet all points of one of the following two sets of criteria)~~ [Offered to the general public](#)

¹ Approved September 12, 1997, revised August 7, 1998, amended April 20, 2001, March 14, 2002, March 10, 2006 and October 26, 2006.

- Course section is offered to the general public not primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).
- Course is not a correspondence course.
- Course is not for concurrent enrollment students (i.e. for secondary students concurrently receiving college credit and high school credit).

#OR#

4.1.2. ~~#OR#~~ Not offered to the general public

- Course section is not offered to the general public and is primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).
- Course was not developed specifically for a particular business or organization.
- Course enrollees are not predominantly non-matriculated employees of the institution.

4.2. Budget-Related Concurrent Enrollment (BC): (course must meet ~~one~~ all of the following ~~sets of~~ criteria)

~~4.2.1.—Offered at high school site via technology~~

- Course is for credit.
- ~~Course is offered at a high school site.~~
- Course is a concurrent enrollment course (i.e. for secondary students concurrently receiving college credit and high school credit) and enrollment activity is supported from state concurrent enrollment funds.
- ~~Course is delivered via technology.~~

~~4.2.2.—#OR#: Not offered at high school site~~

- ~~Course is for credit.~~
- ~~Course is not offered at a high school site.~~
- ~~Board approved tuition is assessed.~~
- All instructor costs of the course are paid for by the USHE institution. institutional funds (e.g. external funds have not been received or ear marked to pay instructor costs).
- Course is taught in Utah ~~or through study abroad.~~
- ~~Course section is part of regular curriculum and is taught on a full term basis or equivalent to a full term basis or until a defined competency is achieved.~~
- ~~Course level is 100 or above (non remedial).~~
- ~~Course is not a correspondence course.~~
- ~~Course is for concurrent students.~~

4.3. Budget-Related ~~Remedial~~ Course Below 1000 (BU): (course must meet all of the following criteria)

- Course is for credit.
- Course is not offered at a high school site, or is offered at a high school site but is not a concurrent enrollment course.
- Board approved tuition is assessed.

- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course ~~is taught~~ originates in Utah ~~or through study abroad~~.
- Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
- Course level is below ~~100~~ 1000.
- Course is taught by ~~WSU, Snow, Dixie, CEU, UVSC, or SLCC~~ an institution with a community college mission (except for CTE courses, which are part of each institution's mission except the University of Utah) or by USU at its branch campuses or continuing education centers after a community college chooses not to exercise its right of first refusal to offer a remedial class.

4.4. **Budget-Related STIT (BV):** (course must meet all of the following criteria)

- Course is not for credit.
- Course is vocational or pre-requisite to a vocational program ~~(i.e. remedial)~~.
- Course is a short-term intensive training course funded with state STIT appropriations.

4.5. **Budget-Related ~~Non~~ Not for Credit ~~ATE~~ CTE (BY):** (course must meet all of the following criteria)

- Course is not for credit.
- Course is vocational or pre-requisite to a vocational program ~~(i.e. remedial)~~.
- Course is not a short-term intensive training course funded with state STIT appropriations.
- ~~Course is not funded by ATCSR funding (i.e. appropriation made to either public education or higher education funneled to the institution to support ATC type training programs in areas of the state without freestanding ATC's).~~
- Course is not funded by Custom Fit funding (i.e. appropriation made to ~~public education funneled to~~ the institution to support company-specific vocational training programs).
- Course is creditable towards a Board approved degree/award program or is a pre-requisite to such program.

R506-5. Self-Supporting Courses for State Funding Purposes

5.1. **Self-Supporting Regular (SD):** (course must meet ~~all points of~~ any one of the following sets of criteria)

5.1.1. **Not for credit:** Not vocational or vocational pre-requisite

- Course is not for credit.
- Course is not vocational or pre-requisite to a vocational program ~~(i.e. remedial)~~.

#OR#

5.1.2. ~~#OR#:~~ Not creditable towards a Board approved degree/award program

- Course is not for credit.
- Course is vocational or pre-requisite to a vocational program ~~(i.e. remedial)~~.
- Course is not a short-term intensive training course funded with state STIT appropriations.
- ~~Course is not funded by ATCSR funding.~~
- Course is not funded by Custom Fit funding.

- Course is not creditable towards a Board approved degree/award program or is a pre-requisite to such program.

#OR#

5.1.3. ~~#OR#~~: For credit: Board approved tuition not assessed

- Course is for credit.
- Board approved tuition is not assessed.

#OR#

5.1.4. ~~#OR#~~: Instructor costs not paid by institutional funds

- Course is for credit.
- Board approved tuition is assessed.
- All instructor costs of the course are not paid for by institutional funds (e.g. external funds have been received or ear-marked to pay instructor costs).

#OR#

5.1.5. ~~#OR#~~: Not taught or originating in Utah or through study abroad

- Course is for credit.
- Board approved tuition is assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course does not originate in Utah or is not taught in Utah or through study abroad.

#OR#

5.1.6. ~~#OR#~~: Not part of regular curriculum - not taught on a full-term basis

- Course is for credit.
- Board approved tuition is assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course ~~is taught~~ originates in Utah or is taught through study abroad.
- Course section is not part of regular curriculum or is not taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.

#OR#

5.1.7. ~~#OR#~~: Not offered to general public

- Course is for credit.
- Board approved tuition is assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course is taught in Utah or through study abroad.

- Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
- Course level is ~~100~~ 1000 or above (~~non-remedial~~).
- Course section is not offered to the general public and is primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).
- Course was developed specifically for a particular business or organization.

#OR#

5.1.8. ~~#OR#~~: In-service training for institutional employees

- Course is for credit.
- Board approved tuition is assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course ~~is taught~~ originates in Utah or is taught through study abroad.
- Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
- Course level is ~~100~~ 1000 or above (~~non-remedial~~).
- Course section is not offered to the general public and is primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).
- Course was not developed specifically for a particular business or organization.
- Course enrollees are predominantly non-matriculated employees of the institution.

#OR#

5.1.9. ~~#OR#~~: Correspondence study

- Course is for credit.
- Board approved tuition is assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course ~~is taught~~ originates in Utah or is taught through study abroad.
- Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
- Course level is ~~100~~ 1000 or above (~~non-remedial~~).
- Course section is offered to the general public not primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).
- Course is a correspondence course.

#OR#

5.1.10. Technology-based course for non-resident student

- Course is delivered to the student through technology.
- Student is a non-resident of Utah under provision of R512, Determination of Resident Status and is residing outside of Utah.

5.2. **Self-Supporting Concurrent Enrollment (SF):** (course must meet all of the following criteria)

- Course is for credit.
- ~~Course offered at a high school site.~~
- Course is a concurrent enrollment course (i.e. for secondary students concurrently receiving college credit and high school credit) and enrollment activity is supported from state concurrent enrollment funds.
- ~~Course is not delivered via technology.~~
- Instructional costs of the course are paid for by the high school or district.
- Course is taught in Utah.

5.3. **Self-Supporting Remedial Course Below 1000 (SM):** (course must meet all of the following criteria)

- Course is for credit.
- Course is not offered at a high school site, or is offered at a high school site but is not a concurrent enrollment course.
- Board approved tuition is not assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course ~~is taught~~ originates in Utah ~~or through study abroad.~~
- Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
- Course level is below ~~100~~ 1000.
- ~~Course is taught by one of the following institutions: UU, USU (unless it is considered budget related under 4.3), or SUU.~~

~~5.4. — Self-Supporting ATCSR (SP):~~ (course must meet all of the following criteria)

- ~~Course is non credit.~~
- ~~Course is vocational or pre-requisite to a vocational program (i.e. remedial).~~
- ~~Course is funded by ATCSR funding (i.e. appropriation made to either public education or higher education funneled to the institution to support ATC type training programs in areas of the state without freestanding ATC's).~~

~~5.5~~ **5.4. Self-Supporting Custom Fit (SQ):** (course must meet all the following criteria)

- Course is ~~non~~ not for credit.
- Course is vocational or pre-requisite to a vocational program ~~(i.e. remedial).~~
- Course funded by Custom Fit funding (i.e. appropriation made to ~~public education funneled to~~ the institution to support company-specific vocational training programs).

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 - Board approved tuition is assessed.
 - All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
 - Course originates in Utah or is taught through study abroad.
 - Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
 - Course level is 1000 or above

#AND# course must also meet one of the following sets of criteria

- 4.1.1. **Offered to the general public**

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- Course section is offered to the general public not primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).
- Course is not a correspondence course.
- Course is not for concurrent enrollment students (i.e. for secondary students concurrently receiving college credit and high school credit).

#OR#

4.1.2. Not offered to the general public

- Course section is not offered to the general public and is primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).
- Course was not developed specifically for a particular business or organization.
- Course enrollees are not predominantly non-matriculated employees of the institution.

4.2. Budget-Related Concurrent Enrollment (BC): (course must meet all of the following criteria)

- Course is for credit.
- Course is a concurrent enrollment course (i.e. for secondary students concurrently receiving college credit and high school credit) and enrollment activity is supported from state concurrent enrollment funds.
- All instructor costs of the course are paid for by the USHE institution.
- Course is taught in Utah.

4.3. Budget-Related Course Below 1000 (BU): (course must meet all of the following criteria)

- Course is for credit.
- Course is not offered at a high school site, or is offered at a high school site but is not a concurrent enrollment course.
- Board approved tuition is assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course originates in Utah.
- Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
- Course level is below 1000.
- Course is taught by an institution with a community college mission (except for CTE courses, which are part of each institution's mission except the University of Utah) or by USU at its branch campuses or continuing education centers after a community college chooses not to exercise its right of first refusal to offer a remedial class.

4.4. Budget-Related STIT (BV): (course must meet all of the following criteria)

- Course is not for credit.
- Course is vocational or pre-requisite to a vocational program.
- Course is a short-term intensive training course funded with state STIT appropriations.

4.5. Budget-Related Not for Credit CTE (BY): (course must meet all of the following criteria)

- Course is not for credit.

- Course is vocational or pre-requisite to a vocational program.
- Course is not a short-term intensive training course funded with state STIT appropriations.
- Course is not funded by Custom Fit funding (i.e. appropriation made to the institution to support company-specific vocational training programs).
- Course is creditable towards a Board approved degree/award program or is a pre-requisite to such program.

R506-5. Self-Supporting Courses for State Funding Purposes

5.1. Self-Supporting Regular (SD): (course must meet any one of the following sets of criteria)

5.1.1. Not for credit: Not vocational or vocational pre-requisite

- Course is not for credit.
- Course is not vocational or pre-requisite to a vocational program.

#OR#

5.1.2. Not creditable towards a Board approved degree/award program

- Course is not for credit.
- Course is vocational or pre-requisite to a vocational program.
- Course is not a short-term intensive training course funded with state STIT appropriations.
- Course is not funded by Custom Fit funding.
- Course is not creditable towards a Board approved degree/award program or is a pre-requisite to such program.

#OR#

5.1.3. For credit: Board approved tuition not assessed

- Course is for credit.
- Board approved tuition is not assessed.

#OR#

5.1.4. Instructor costs not paid by institutional funds

- Course is for credit.
- Board approved tuition is assessed.
- All instructor costs of the course are not paid for by institutional funds (e.g. external funds have been received or ear-marked to pay instructor costs).

#OR#

5.1.5. Not taught or originating in Utah or through study abroad

- Course is for credit.
- Board approved tuition is assessed.

- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course does not originate in Utah or is not taught in Utah or through study abroad.

#OR#

5.1.6. Not part of regular curriculum - not taught on a full-term basis

- Course is for credit.
- Board approved tuition is assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course originates in Utah or is taught through study abroad.
- Course section is not part of regular curriculum or is not taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.

#OR#

5.1.7. Not offered to general public

- Course is for credit.
- Board approved tuition is assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course is taught in Utah or through study abroad.
- Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
- Course level is 1000 or above.
- Course section is not offered to the general public and is primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).
- Course was developed specifically for a particular business or organization.

#OR#

5.1.8. In-service training for institutional employees

- Course is for credit.
- Board approved tuition is assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course originates in Utah or is taught through study abroad.
- Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
- Course level is 1000 or above.
- Course section is not offered to the general public and is primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).
- Course was not developed specifically for a particular business or organization.
- Course enrollees are predominantly non-matriculated employees of the institution.

#OR#

5.1.9. Correspondence study

- Course is for credit.
- Board approved tuition is assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course originates in Utah or is taught through study abroad.
- Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
- Course level is 1000 or above.
- Course section is offered to the general public not primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).
- Course is a correspondence course.

#OR#

5.1.10. Technology-based course for non-resident student

- Course is delivered to the student through technology.
- Student is a non-resident of Utah under provision of R512, Determination of Resident Status and is residing outside of Utah.

5.2. Self-Supporting Concurrent Enrollment (SF): (course must meet all of the following criteria)

- Course is for credit.
- Course is a concurrent enrollment course (i.e. for secondary students concurrently receiving college credit and high school credit) and enrollment activity is supported from state concurrent enrollment funds.
- Instructional costs of the course are paid for by the high school or district.
- Course is taught in Utah.

5.3. Self-Supporting Course Below 1000 (SM): (course must meet all of the following criteria)

- Course is for credit.
- Course is not offered at a high school site, or is offered at a high school site but is not a concurrent enrollment course.
- Board approved tuition is not assessed.
- All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).
- Course originates in Utah.
- Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.
- Course level is below 1000.

5.4. Self-Supporting Custom Fit (SQ): (course must meet all the following criteria)

- Course is not for credit.

- Course is vocational or pre-requisite to a vocational program.
- Course funded by Custom Fit funding (i.e. appropriation made to the institution to support company-specific vocational training programs).