

November 9, 2016

MEMORANDUM

TO: State Board of Regents  
FROM: David L. Buhler  
SUBJECT: USHE – Institutional Residences Annual Report

Issue

Regent Policy R207, *Institutional Residences for Colleges and Universities in the Utah System of Higher Education*, requires USHE institutions to submit an annual report which summarizes both the actual and budgeted expenditures for maintenance, repair, utilities, insurance, and domestic assistance associated with the institutional residences.

Background

Regents have asked for an annual update regarding the expenditures associated with institutional residences. Each year, USHE institutions are required to submit to the Commissioner a report summarizing the current fiscal year budgeted expenditures approved by the institutional Boards of Trustees for the institutional residences, detailing budgeted expenditures for maintenance costs, custodial and domestic assistance, and insurance.

Institutions use this report to not only inform the Regents about expenditures for the institutional residences, but to also to maintain proper institutional internal control; to ensure that institutional residence budgets are set and approved by Trustees; to monitor annual expenditures against approved budget; to support the institutional residence as a sanctioned institutional offering, and to provide transparency regarding the facility's operation and maintenance costs.

The attached report summarizes the approved budget and expenditures for each institutional residence over the past three fiscal years. Footnotes have been added to describe the following: any significant change from prior years; any significant variances between the budgeted and actual expenditures; and/or any significant capital improvements to the residence.

Commissioner's Recommendation

This is an information item only; no action is needed.

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David L. Buhler  
Commissioner of Higher Education

DLB/KLH/BLS  
Attachment

# Utah System of Higher Education

## *Institutional Residences Operation and Maintenance Report*

*FY 2014-2017*

	2013-14		2014-15		2015-16		2016-17	Source of Funds	Square Footage
	Budget	Actual	Budget	Actual	Budget	Actual	Budget		
UU	\$ 60,900	\$ 60,844	\$ 63,000	\$ 59,519	\$ 64,100	\$ 57,203	\$ 63,600	Discretionary	8,803
USU	\$ 72,000	\$ 71,667	\$ 72,000	\$ 63,940	\$ 72,000	\$ 51,263	\$ 72,000	E&G	12,403
WSU <sup>1</sup>	\$ 27,400	\$ 21,292	\$ 28,300	\$ 21,220	\$ 28,300	\$ 21,209	\$ 28,300	E&G	-
SUU <sup>2</sup>	\$ 67,000	\$ 69,890	\$ 68,000	\$ 31,075	\$ 83,000	\$ 46,104	\$ 92,000	E&G	11,314
Snow	\$ 7,000	\$ 13,926	\$ 12,000	\$ 4,386	\$ 10,900	\$ 8,186	\$ 12,000	E&G	6,128
DSU <sup>3</sup>	\$ 19,650	\$ 12,869	\$ 59,500	\$ 64,798	\$ 72,000	\$ 20,476	\$ 34,000	E&G, Discretionary	5,246
UVU <sup>4</sup>	\$ 191,940	\$ 161,823	\$ 48,687	\$ 32,447	\$ 40,940	\$ 21,468	\$ 41,500	E&G, Discretionary, Donor	6,235
SLCC <sup>5</sup>	\$ 36,100	\$ 9,584	\$ 20,000	\$ 20,000	\$ 24,370	\$ 24,370	\$ 24,370	Discretionary	-

Board Policy R207 provides for institutional coverage of expenses for maintenance, repair, utilities, insurance, and domestic assistance serving institutional purposes. Policy requires annual reports for the previous year's actual expenses and the current year's budget, as summarized in the table above.

*Footnotes to this table contain explanations of significant budget variances including capital improvements.*

<sup>1</sup> *WSU amounts reflect housing allowance and institutional functions.*

<sup>2</sup> *SUU replaced carpet in the institutional residence in FY 2014. The HVAC replacement funded with capital improvement dollars scheduled for FY 2016 was postponed to FY 2017 due to higher priority items.*

<sup>3</sup> *DSU addressed deferred maintenance issues by replacing carpet, tile, and paint in FY 2015. Institution elected not to proceed with ADA access improvements originally budgeted for FY 2016.*

<sup>4</sup> *UVU remodeled and increased square footage of the institutional residence in FY 2014 as approved by the Board of Regents.*

<sup>5</sup> *SLCC sold the institutional residence in FY 2014, therefore subsequent amounts reflect only housing allowance.*