

November 7, 2018

MEMORANDUM

TO: State Board of Regents

FROM: David L. Buhler

SUBJECT: USHE – Revision of Policy R510 & Adoption of Policies R514, R515, R516

Issue

The Board is asked to review and take action on the proposed policy revisions to Regent Policy, R510, *Tuition and Fees*.

Background

During the September 2018 Board meeting, the Finance and Facilities received an update related to the Board's initiative to review its tuition and student aid policies. As part of this update, the Board engaged in a conversation regarding its current tuition policy and practices and the potential impact on student affordability.

As a result of the conversation, the Finance and Facilities Committee directed the Commissioner's staff to begin work on a revised tuition policy that would do the following and report back at the November Board meeting:

1. Discontinue the practice of a uniform tuition rate being applied to all USHE institutions.
2. Discontinue the practice of a first-tier/second-tier tuition setting process and move to a process that allows for institution specific tuition rates (effective for the March 2019 tuition cycle).

In reviewing the current policy, the Commissioner's staff has recommended that the current policy be divided into the following four policies. Each of the four policies is included in the attachments for the Board's review and consideration.

1. R510, *Tuition*
2. R514, *Refunds of Tuition, Fees, and Other Student Charges*
3. R515, *Excess Credit Hour Surcharges*
4. R516, *General Student Fees*

It is important to note that the majority of the language in these four policies currently exists in the current version of the Regent Policy R510, *Tuition and Fees*. The primary exception to this is the new language that has been added to the tuition setting policy that eliminates the long-standing uniform tuition requirement and the tiered-tuition structure, as well as new language that provides guidance on what institutions are required to submit when proposing tuition adjustments.

It is anticipated that these policies will continue to be reviewed throughout the year in more detail once the tuition and student aid policy study is completed and as the Board continues its work strengthen the framework to ensure affordable access to higher education for Utah students.

Commissioner's Recommendation

The Commissioner recommends the Regents review and approve the revisions to Regent Policy R510 and adopt Regent policies R514, R515, and R516, effective immediately.

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David L. Buhler  
Commissioner of Higher Education

DLB/KLH  
Attachments

**R510-1. Purpose:** To establish a tuition policy for the Utah System of Higher Education (USHE) including identification of authorized tuition models and other tuition charges.

## **R510-2. References**

- 2.1. Utah Code §53B-7-101 (Combined Requests for Appropriations)
- 2.2. Federal Higher Education Act, 20 USC 1091b (Institutional Refunds)
- 2.3. State Board of Regents Policy, R511 (Tuition Disclosures and Consultation)

## **R510-3. Setting Tuition**

- 3.1. The Board of Regents shall set tuition, fees, and charges for each institution at levels necessary to meet budget requirements.
- 3.2. The president of each USHE institution, in consultation with their Board of Trustees and student body leadership, may recommend institutional tuition rate adjustments to the Board of Regents for review and action. Presidents who wish to adjust their institution's tuition rate must submit a formal proposal to the Board of Regents that includes the following:
  - 3.2.1. The total tuition adjustment in both dollars and percentage increase or decrease;
  - 3.2.2. A detailed list of how the institution plans to use the additional tuition revenue, which may include tuition adjustments required to meet Legislative funding matches for compensation and internal service fees, faculty promotion and tenure adjustments, and other operating needs identified by the institution;
  - 3.2.3. The anticipated impact of the proposed tuition adjustment on student access, retention, and completion rates;
  - 3.2.4. Rationale and justification for why the tuition rate adjustment is necessary, including reference to the institution's efforts to fund the proposed uses with existing resources, through internal reallocation, or institutional efficiencies;
  - 3.2.5. Documentation which shows support from the Board of Trustees; and
  - 3.2.6. Documentation which shows students were advised of proposed tuition rates through Truth-in-tuition Hearings and Student Body Leadership Councils.

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<sup>1</sup> Approved October 24, 1986; amended June 19, 1987, August 7, 1987, July 27, 1990, March 21, 1992, September 18, 1992, November 6, 1992, September 24, 1993, September 23, 1994, November 4, 1994, June 23, 1995, November 3, 1995, August 1, 1996, September 11, 1997, November 13, 1998, January 21, 2000, March 17, 2000, March 16, 2001, March 14, 2002, July 2, 2002 and December 14, 2007, January 11, 2012, November 16, 2012, and May 16, 2014.

3.3. The Board shall include its projected tuition rates in its unified budget proposal to the Legislature.

3.4. In the first Board of Regents meeting following the legislative session, the Board shall vote on final proposed tuition adjustments, if any.

3.5. Tuition changes approved by the Board take effect for the subsequent semester.

#### **R510-4. Annual Review**

4.1. The Board shall annually review price competitive tuition data including: comparisons with national and regional tuition and fee data, institutional cost data, median income statistics, average student debt load data, general and course fee data, and other affordability factors the Board identifies to determine if tuition adjustments are necessary to maintain fairness and price competitiveness.

4.2. Under the direction of the Regent Audit Subcommittee, the USHE internal auditor will select one or more institution's tuition adjustment proposals to verify accuracy, integrity, and reliability of the data provided to the Board of Regents at the end of the associated fiscal year.

#### **R510-5. Tuition Cost Ratios**

5.1. **Resident/Nonresident Tuition Cost Ratios:** Undergraduate nonresident tuition shall be set at no less than three times the institutional undergraduate resident tuition rate. The Board may grant exceptions on a case-by-case basis.

5.2. **Graduate/Undergraduate Tuition Cost Ratios:** Tuition for resident and nonresident graduate students will be set at no less than 110 percent of tuition for undergraduate students.

#### **R510-6. Authorized Tuition Models**

6.1. Institutions may use either one of the following tuition models:

6.1.1. A Linear Tuition Model in which the incremental tuition charge per student credit hour is the same without regard to the number of hours for which a student is enrolled.

6.1.2. A Plateau Model in which students carrying a defined full-time load are charged a uniform rate within a defined range of credit hours. Tuition per credit hour between one credit hour and the beginning of the plateau range shall increase in linear increments. Students enrolled for credit hours beyond the plateau range shall be charged at the same rate-per-credit-hour as the credit hours preceding the plateau range. The plateau, may be any range between 10 and 20 credit hours.

#### **R510-7. Other Tuition Charges**

7.1. **Registration Costs:** Registration costs shall be included in tuition, not assessed as a separate fee category.

**7.2. Online Tuition:** The Board may authorize alternative tuition schedules for online courses on a case by case basis.

**7.3. Differential Tuition:** The Board may authorize differential tuition schedules for programs on a case by case basis. In addition to initially approving differential tuition rates for academic programs, differential tuition increases beyond the regular institutional tuition increase proposal shall be approved by the Board. The institution shall use increased revenues from the differential tuition rate to benefit the impacted program and to help support related campus services. Institutions requesting differential tuition schedules should consult with students in the program and consider the following:

**7.3.1.** The student and workforce demand for the program;

**7.3.2.** The impact of differential tuition rates on student access and retention;

**7.3.3.** The tuition rates of comparable programs at other institutions; and

**7.3.4.** The potential earnings capacity of program graduates.

**7.4. Apprenticeship Programs:** Tuition for courses offered specifically for apprenticeship programs shall be at least one-half the tuition for other credit courses at the institution, but shall not exceed regular tuition rates.

**7.5. Non-Credit Programs:** Short-term intensive training (STIT) funds are appropriated by the Legislature to each participating USHE institution. Tuition for non-credit CTE programs funded with STIT dollars will be established by each institution at a level sufficient to cover program costs and in accordance with USHE guidelines and legislative intent.

**7.6. Other Non-Credit Instruction:** Tuition for other non-credit programs and courses shall be established by each USHE institution. The total of all available funds, including tuition, shall be sufficient to pay the total direct cost of providing such programs and courses, in the aggregate, for the institution.

**7.7. Summer School:** Institutions may reduce tuition rates for summer school students to incentivize students to attend during summer semesters.

**7.8. Contract Credit Courses:** Charges for credit courses provided under contract to outside agencies shall be at least sufficient to pay the total direct costs of providing such courses, in the aggregate for the institution.

**7.9. Continuing Education Credit Enrollments:** Students enrolled in Continuing Education credit courses other than contract courses shall be assessed tuition at no less than the regular charge per credit hour.

**7.10. Medicine and Law:** The Board will consider tuition for Medicine and Law programs separate from other programs.

**7.11. Course Audit Registrations:** Students must register to audit any class. Such audit hours will be part of their total load and they shall pay tuition at the same rate as paid by students registering for credit in the course.

**7.12. Correction Facility Program Tuition:** Reduced tuition for programs provided to inmates at state correctional facilities will be considered separately. The State Board of Education advisory council overseeing corrections education and recidivism reduction issues will determine inmate eligibility for participation in Board of Regents authorized tuition reductions.

**R510-1. Purpose:** ~~To establish a tuition and general fee policy.~~ To establish a tuition policy for the Utah System of Higher Education (USHE) including identification of authorized tuition models and other tuition charges.

## R510-2. References

- 2.1. Utah Code §53B-7-101 (Combined Requests for Appropriations)
- 2.2. Federal Higher Education Act, 20 USC 1091b (Institutional Refunds)
- 2.3. State Board of Regents Policy, R511 (Tuition Disclosures and Consultation)

## R510-3. ~~General Policy~~ Setting Tuition

~~3.1. — **Uniform First Tier Tuition Rate Increases:** A first tier tuition rate increase shall be uniform for all institutions, shall be implemented at the same time, and shall be based on evaluations of current data on inflation and national and regional tuition increases and justified by specific increasing needs in the Utah System of Higher Education.~~

~~3.2. — **Optional Second Tier Tuition Rate Increases:** Each institutional President, with the approval of the institutional Board of Trustees, may recommend a second tier tuition rate increase to meet specific institutional needs. Second tier tuition rate increases may apply to all programs equally or may be different for specific programs.~~

~~3.3. — **Application of Increases in Tuition Revenues in Appropriated Operating Budget Requests:** In developing its appropriated operating budget recommendations, it is the policy of the Board to include tuition revenues from projected additional annualized FTE enrollments as a portion of the projected financing for proposed expenditure increases to accommodate the additional students. Revenues from a proposed uniform first tier tuition rate increase pursuant to Section 3.1 will be included as partial financing for other proposed expenditure increases. Revenues from recommended second tier tuition rate increases pursuant to Section 3.2 will not be included as partial financing for other proposed expenditure increases.~~

3.1. The Board of Regents shall set tuition, fees, and charges for each institution at levels necessary to meet budget requirements.

3.2. The president of each USHE institution, in consultation with their Board of Trustees and student body leadership, may recommend institutional tuition rate adjustments to the Board of Regents for review and action. Presidents who wish to adjust their institution's tuition rate must submit a formal proposal to the Board of Regents that includes the following:

<sup>1</sup> Approved October 24, 1986; amended June 19, 1987, August 7, 1987, July 27, 1990, March 21, 1992, September 18, 1992, November 6, 1992, September 24, 1993, September 23, 1994, November 4, 1994, June 23, 1995, November 3, 1995, August 1, 1996, September 11, 1997, November 13, 1998, January 21, 2000, March 17, 2000, March 16, 2001, March 14, 2002, July 2, 2002 and December 14, 2007, January 11, 2012, November 16, 2012, and May 16, 2014.

3.2.1. The total tuition adjustment in both dollars and percentage increase or decrease;

3.2.2. A detailed list of how the institution plans to use the additional tuition revenue, which may include tuition adjustments required to meet Legislative funding matches for compensation and internal service fees, faculty promotion and tenure adjustments, and other operating needs identified by the institution;

3.2.3. The anticipated impact of the proposed tuition adjustment on student access, retention, and completion rates;

3.2.4. Rationale and justification for why the tuition rate adjustment is necessary, including reference to the institution's efforts to fund the proposed uses with existing resources, through internal reallocation, or institutional efficiencies;

3.2.5. Documentation which shows support from the Board of Trustees; and,

3.2.6. Documentation which shows students were advised of proposed tuition rates through Truth-in-tuition Hearings and Student Body Leadership Councils.

3.3. The Board shall include its projected tuition rates in its unified budget proposal to the Legislature.

3.4. In the first Board of Regents meeting following the legislative session, the Board shall vote on final proposed tuition adjustments, if any.

3.5 Tuition changes approved by the Board take effect for the subsequent semester.

~~3.4. — **Effective Date for New Tuition Schedules:** Tuition changes approved by the Board take effect for the subsequent semester.~~

#### R510-4. Annual Review

4.1. The Board shall annually review price competitive tuition data including: comparisons with national and regional tuition and fee data, institutional cost data, median income statistics, average student debt load data, general and course fee data, and other affordability factors the Board identifies to determine if tuition adjustments are necessary to maintain fairness and price competitiveness.

4.2. Under the direction of the Regent Audit Subcommittee, the USHE internal auditor will select one or more institution's tuition adjustment proposals to verify accuracy, integrity, and reliability of the data provided to the Board of Regents at the end of the associated fiscal year.

#### R510-5. Tuition Cost Ratios

5.1. **Resident/Nonresident Tuition Cost Ratios:** Undergraduate nonresident tuition shall be set at no less than three times the institutional undergraduate resident tuition rate. The Board may grant exceptions on a case-by-case basis.



**5.2. Graduate/Undergraduate Tuition Cost Ratios:** Tuition for resident and nonresident graduate students will be set at no less than 110 percent of tuition for undergraduate students.

~~**3.5. — Resident/Nonresident Tuition Relationships:** Undergraduate nonresident tuition shall be set at no less than 3.0 times the institutional undergraduate resident tuition rate. The Board may grant exceptions on a case-by-case basis.~~

~~**3.6. — Graduate/Undergraduate Tuition Relationships:** Tuition for resident and non-resident graduate students will be set at no less than one hundred ten percent (110%) of tuition for undergraduate students. For this purpose, a graduate student is a student who has been formally admitted to a graduate program at the institution.~~

~~**3.7. — Annual Review for Fairness and Price Competitiveness:** Annually, the tuition relationship targets, comparisons with national and regional tuition and fee data, institutional cost data, general and course fee data, and other factors shall be reviewed to determine if modifications are necessary to maintain fairness and price competitiveness.~~

#### **R510-46. Authorized Tuition Models ~~Tuition Charges~~**

**6.1. Institutions may use either one of the following tuition models:**

**6.1.1. A Linear Tuition Model in which the incremental tuition charge per student credit hour is the same without regard to the number of hours for which a student is enrolled.**

**6.1.2. A Plateau Model in which students carrying a defined full-time load are charged a uniform rate within a defined range of credit hours. Tuition per credit hour between one credit hour and the beginning of the plateau range shall increase in linear increments. Students enrolled for credit hours beyond the plateau range shall be charged at the same rate-per-credit-hour as the credit hours preceding the plateau range. The plateau, may be any range between 10 and 20 credit hours.**

~~**4.1. — Alternative Tuition Models:** Institutions may use either: (1) a linear tuition model, in which the incremental tuition charge per student credit hour is the same without regard to the number of hours for which a student is enrolled, or (2) a plateau model, in which students carrying a defined full-time load are charged a uniform rate within a defined range of credit hours.~~

~~**4.1.1. — Maximum Range for the Plateau Model:** The plateau, or number of credit hours for which a full-time tuition rate may be charged, may be any range between 10 and 20 credit hours. Where the plateau model is used, tuition per credit hour between one credit hour and the beginning of the plateau range shall increase in linear increments. Students enrolled for credit hours beyond the plateau range shall be charged at the same rate per credit hour as those before the plateau range.~~

#### **R510-7. Other Tuition Charges**

**7.1. Registration Costs:** Registration costs shall be included in tuition, not assessed as a separate fee category.

~~**4.1.2.**~~ **7.2. Online Tuition:** The Board may authorize alternative tuition schedules for online courses on a case by case basis.

~~Alternative tuition schedules for online courses may be authorized by the Board on a case by case basis.~~

~~7.34.2. Differential Tuition: The Board may authorize Differential tuition schedules for undergraduate and graduate programs may be authorized by the Board on a case by case basis. In addition to initially approving differential tuition rates for academic programs, differential tuition increases beyond the regular institutional tuition increase proposal should shall be approved by the Board. The institution shall use The increased revenues from the differential tuition rate charges shall be used by the institution to benefit the impacted program and to help support related campus services. Institutions requesting differential tuition schedules should consult with students in the program and consider the following:~~

- ~~7.3.1.4.2.1. The student and market-workforce demand for the program;~~
- ~~7.3.2.4.2.2. The impact of differential tuition rates on student access and retention;~~
- ~~7.3.3.4.2.3. The tuition rates of comparable programs at other institutions; and~~
- ~~7.3.4.4.2.4. The potential earnings capacity of program graduates.; and~~

~~4.2.5. the societal importance of the program~~

~~4.3. Inclusion of Registration Costs: Registration costs shall be included in tuition, not assessed as a separate fee category.~~

~~7.4.4.4. Apprenticeship Programs: Tuition for courses offered specifically for apprenticeship programs shall be at least one-half the of, and no greater than, tuition for other credit courses at the institution, but shall not exceed regular tuition rates.~~

~~7.5. 4.5. Non-Credit Programs: Short-term intensive training (STIT) funds are appropriated by the Legislature to each participating USHE institution. Tuition for non-credit CTE programs funded with STIT dollars will be established by each institution at a level sufficient to cover program costs and in accordance with USHE guidelines and legislative intent.~~

~~7.6. 4.6. Other Non-Credit Instruction: Tuition for other non-credit programs and courses shall be established by each USHE institution. The total of all available funds, including tuition, shall be sufficient to pay the total direct cost of providing such programs and courses, in the aggregate, for the institution.~~

~~7.7. 4.7. Summer School: Institutions may reduce tuition rates for summer school students to incentivize students to attend during summer semesters. Resident summer school students shall be assessed the same tuition per credit hour or full-time load as that assessed resident students during the regular academic year.~~

~~7.8. 4.8. Contract Credit Courses: Charges for credit courses provided under contract to outside agencies shall be at least sufficient to pay the total direct costs of providing such courses, in the aggregate for the institution.~~

~~7.9. 4.9. Continuing Education Credit Enrollments: Students enrolled in Continuing Education credit courses other than contract courses shall be assessed tuition at no less than the regular charge per credit hour.~~

~~4.10.7.10. -Medicine and Law: The Board will consider Tuition for Medicine and Law programs will be considered separately. separate from other programs.~~

~~7.11. 4.11.-Course Audit Registrations: Students must register to audit any class. Such audit hours will be part of their total load and they shall pay tuition at the same rate as paid by students registering for credit in the course.~~

~~7.12. 4.12.-Correction Facility Program Tuition: Reduced tuition for programs provided to inmates at state correctional facilities will be considered separately. The State Board of Education advisory council overseeing corrections education and recidivism reduction issues will determine inmate eligibility for participation in Board of Regents authorized tuition reductions.~~

~~4.13.—Excess Credit Hours: Institutional policies and practices shall encourage students not to accumulate credit hours beyond those needed to successfully complete a program of study.~~

~~4.13.1. Definitions: For the purpose of Section 4.13 only, the following terms are defined for the application of and administration of the excess credit hour surcharge.~~

~~4.13.1.1. Program of study: A group of academic courses required for a baccalaureate degree.~~

~~4.13.1.2. Excess Credit Hour Surcharge: For resident students, the surcharge amount to be charged is double the current year's resident tuition rates, pertaining to that institution, for the number of excess credit hours taken. Non-resident students paying non-resident tuition rates are not subject to excess credit hour surcharges.~~

~~4.13.2. Excess Credit Hour Surcharge: An institution may charge a student the excess credit surcharge subject to conditions set forth in Section 4.13.4 for credit hours in excess of 125% of a student's program of study.~~

~~4.13.3. Notification: Each USHE institution must establish a process by which students are notified of this policy when enrolling at the institution. Strategies to assist student completion shall be employed and may include such things as encouraging a student to meet with an adviser before or upon hitting the 125% of degree completion, and/or encouraging the student to establish a plan for program completion by meeting with a counselor or advisor.~~

#### ~~4.13.4. Determination of Number of Credit Hours Necessary for the Program of Study~~

~~4.13.4.1. Allowances for Program of Study: The number of credit hours for completion of the program of study may include the hours needed for a double major, dual degree, additional minor, certification(s), and/or emphasis(es) related to the student's major area of study. Second bachelor degrees will also be allowed and will be considered new programs of study for purposes of the excess credit hour calculation.~~

~~4.13.4.2. Credit Hours Excluded: Excluded from the calculation of the credits required for completion of a student's program of study are credit hours: (1) earned through concurrent enrollment, advanced placement, and credit by examination, (2) resulting from re-entry into the educational system by a student who may have accumulated a large number of credits, or even completed degrees, but where employment requirements~~

obligate his or her return to college, (3) resulting from a defensible change in major, and (4) developmental education credit.

**4.14. Tuition Surcharge for Course Repetition:** Tuition for repeating a course more than once shall be charged at the full cost of the instruction unless the institution determines that the repetition is a result of illness, accident or other cause beyond the student's control or unless the course is prescribed by the student's program of study.

## **R510-5. General Fees Other Than Tuition**

**5.1. — Approval by the Board:** All general student fees are subject to Board of Regents approval, normally in conjunction with annual determination of tuition rates. Course fees do not require Board approval but the Board will monitor such fees. Course fees will also be included in determining financial aid cost of attendance and the level of student contribution toward their total education costs.

**5.2. — Variation Among Institutions:** General fees other than tuition may vary according to specific institutional needs.

**5.3 — General Student Fee Policy:** Each USHE institution shall develop a student fee policy to address the following:

**5.3.1. Advisory Board:** Each institution shall establish a student fee advisory board to oversee the creation, review and maintenance of required student fees.

**5.3.1.1.** The advisory board membership shall include currently enrolled students.

**5.3.2 Institutional Policy:** The institutional policy shall contain processes for the student fee advisory board to follow in the creation, review and maintenance of student fees. The institutional policy shall include the following:

**5.3.2.1. Fee Creation:** The creation of new student fees shall be supported by a demonstrated need, clear statement describing the fee, and a sound budgetary plan.

**5.3.2.2. Fee Review:** The student fee advisory board shall periodically monitor and annually review student fees. Processes and discussions should focus primarily on—but not be limited to—the adequacy of the fee in accomplishing the stated objective. Fee account fund balances should be minimal or, in cases where fund balances are accumulating, be supported by a plan for use of the funding.

**5.3.2.3. Fee Maintenance:** Fee amounts may be increased or decreased as necessary to adequately accomplish the stated objective. Changes resulting from a fee increase shall be supported with adequate documentation describing the rationale for the increase and the planned uses of the additional fee revenue.

**5.3.3. Fee Reporting:** The student fee advisory board may require an annual report from each student fee program manager.

**5.4 — Fee Percentage Rate Increase above 1<sup>st</sup> Tier Tuition Percentage Rate Increase:** If an institution is proposing to increase general student fees at a percentage rate greater than the percentage

rate the system is proposing to increase 1<sup>st</sup> tier tuition, the institution shall submit a letter to the Board regarding fee increases from student leadership at the institution. \_\_\_\_\_

**5.5. Option to Waive General Student Fees:** General fees other than tuition may, at the institution's option, be waived in whole or in part for students.

#### **R510-6 . Refunds of tuition, fees, and other student charges**

**6.1. Refund Policy:** Each institution shall provide refunds of tuition, fees, housing and meal, and other student charges to all students who either fail to enroll or who withdraw after enrolling. The refunds shall be at least as large as prescribed in this policy. This policy is designed to provide a fair and equitable refund policy for all students who withdraw, whether or not receiving Federal student financial aid, and also for specific compliance with the provisions of Section 484B of the Federal Higher Education Act, as amended (20 USC 1091b.), as applicable to students who receive Federal student financial aid (Federal campus-based student financial aid, Federal Pell Grants, Leveraging Educational Assistance Partnership Program aid, Federal Family Education Loan Program loans or Federal Direct Student Loan Program loans), and who fail to register or who withdraw after enrolling.

**6.2. General Refund Policy for Students Who Withdraw from the Institution and Who Are Not First Time Enrollees in the Institution and Also Receiving Federal Student Financial Aid:** Students who are not first time enrollees in the institution and also receiving Federal student financial aid, both as defined in Federal regulations, 34 CFR Section 668.22 and who withdraw from the institution or drop courses shall be entitled to refunds of tuition, fees, and other student charges (including housing and meal contract charges) paid to the institution which meet or exceed the following requirements:

<b>Refund Period</b>	<b>Portion Refundable</b>
Prior to 15th calendar day of the quarter, semester, or other period of enrollment	at least 70%
From the 15th calendar day to close of business on the 21st calendar day of the period of enrollment	at least 50%
After the 21st calendar day	none

**6.2.1. Non Refundability of Application, Admission, and Late Registration Fees:** Late registration, application and admission fees are not required to be refunded for students who are not enrolled at the institution for the first time in the current enrollment period and also receiving Federal student financial aid.

**6.2.2. Refunds in the Case of Meal Tickets or Contracts with Dollar Value Rather than Time Periods:** Where students purchase meal tickets or contracts with dollar value rather than covering specific time periods, a student who withdraws is entitled only to a refund of the unused portion of the dollar value of the ticket or contract.

**6.3. Special Pro Rata Refund Policy for Students Who Fail to Enroll or Who Withdraw from the Institution and Who are First Time Enrollees in the Institution and are Also Receiving Federal Student Financial Aid:** Any student who is a first time enrollee in the institution and is also receiving Federal student financial aid, both as defined in Federal regulations, 34 CFR Section 668.22 and who fails to register or who withdraws from the institution or otherwise fails to complete the period of enrollment for which registered, on or before the 60 percent point (in time) in the period of enrollment for which the student has paid tuition, fees, room and board, or other charges, shall be entitled to a pro rata refund of such tuition, fees, room and board, and other charges. The institution's pro rata refund policy for such students, and all

calculations and determinations there under, are required to conform to the requirements of 34 CFR Section 668.22.

**6.4. — Refunds for Students Who Withdraw from the Institution After the 60 Percent Point:** The institution may, but is not required to, provide for refunds for students described in Section 6.3 who withdraw from the institution after the 60 percent point (in time) in the period of enrollment for which the student has paid tuition, fees, room and board, or other charges.

**6.5. — Exceptions for Hardship:** Refunds greater than provided for in this refund policy may be granted by the President or the President's designee for unusual hardship cases.

# R514, Refunds of Tuition, Fees, and Other Student Charges <sup>1</sup>

**R510-1. Purpose:** To establish a refund policy for the Utah System of Higher Education (USHE) institutions for tuition, fees, and other student charges.

## R510-2. References

- 2.1. Utah Code §53B-7-101 (Combined Requests for Appropriations)
- 2.2. Federal Higher Education Act, 20 USC 1091b (Institutional Refunds)
- 2.3. Regents Policy, R510 (Tuition)
- 2.4. Regents Policy, R511 (Tuition Disclosures and Consultation)

## R514-3. Refunds of tuition, fees, and other student charges

**3.1. Refund Policy:** Each institution shall provide refunds of tuition, fees, housing and meal, and other student charges to all students who either fail to enroll or who withdraw after enrolling. The refunds shall be at least as large as prescribed in this policy. This policy is designed to provide a fair and equitable refund policy for all students who withdraw, whether or not receiving Federal student financial aid, and also for specific compliance with the provisions of Section 484B of the Federal Higher Education Act, as amended (20 USC 1091b.), as applicable to students who receive Federal student financial aid (Federal campus-based student financial aid, Federal Pell Grants, Leveraging Educational Assistance Partnership Program aid, Federal Family Education Loan Program loans or Federal Direct Student Loan Program loans), and who fail to register or who withdraw after enrolling.

**3.2. General Refund Policy for Students Who Withdraw from the Institution and Who Are Not First Time Enrollees in the Institution and Also Receiving Federal Student Financial Aid:** Students who are not first time enrollees in the institution and also receiving Federal student financial aid, both as defined in Federal regulations, 34 CFR Section 668.22 and who withdraw from the institution or drop courses shall be entitled to refunds of tuition, fees, and other student charges (including housing and meal contract charges) paid to the institution which meet or exceed the following requirements:

Refund Period	Portion Refundable
Prior to 15th calendar day of the quarter, semester, or other period of enrollment	at least 70%
From the 15th calendar day to close of business on the 21st calendar day of the period of enrollment	at least 50%
After the 21st calendar day	none

<sup>1</sup> Approved October 24, 1986; amended June 19, 1987, August 7, 1987, July 27, 1990, March 21, 1992, September 18, 1992, November 6, 1992, September 24, 1993, September 23, 1994, November 4, 1994, June 23, 1995, November 3, 1995, August 1, 1996, September 11, 1997, November 13, 1998, January 21, 2000, March 17, 2000, March 16, 2001, March 14, 2002, July 2, 2002 and December 14, 2007, January 11, 2012, November 16, 2012, and May 16, 2014.

**3.2.1. Non Refundability of Application, Admission, and Late Registration Fees:** Late registration, application and admission fees are not required to be refunded for students who are not enrolled at the institution for the first time in the current enrollment period and also receiving Federal student financial aid.

**3.2.2. Refunds in the Case of Meal Tickets or Contracts with Dollar Value Rather than Time Periods:** Where students purchase meal tickets or contracts with dollar value rather than covering specific time periods, a student who withdraws is entitled only to a refund of the unused portion of the dollar value of the ticket or contract.

**3.3. Special Pro Rata Refund Policy for Students Who Fail to Enroll or Who Withdraw from the Institution and Who are First Time Enrollees in the Institution and are Also Receiving Federal Student Financial Aid:** Any student who is a first time enrollee in the institution and is also receiving Federal student financial aid, both as defined in Federal regulations, 34 CFR Section 668.22 and who fails to register or who withdraws from the institution or otherwise fails to complete the period of enrollment for which registered, on or before the 60 percent point (in time) in the period of enrollment for which the student has paid tuition, fees, room and board, or other charges, shall be entitled to a pro rata refund of such tuition, fees, room and board, and other charges. The institution's pro rata refund policy for such students, and all calculations and determinations there under, are required to conform to the requirements of 34 CFR Section 668.22.

**3.4. Refunds for Students Who Withdraw from the Institution After the 60 Percent Point:** The institution may, but is not required to, provide for refunds for students described in Section 6.3 who withdraw from the institution after the 60 percent point (in time) in the period of enrollment for which the student has paid tuition, fees, room and board, or other charges.

**3.5. Exceptions for Hardship:** Refunds greater than provided for in this refund policy may be granted by the President or the President's designee for unusual hardship cases.



# ~~R510~~R514, Refunds of Tuition, Fees, and Other Student Charges ~~Tuition and Fees~~<sup>1</sup>

**R510-1. Purpose:** To establish a refund policy for the Utah System of Higher Education (USHE) institutions for tuition, fees, and other student charges. ~~To establish a tuition and general fee policy.~~

## **R510-2. References**

- 2.1. Utah Code §53B-7-101 (Combined Requests for Appropriations)
- 2.2. Federal Higher Education Act, 20 USC 1091b (Institutional Refunds)
- 2.3. [Regents Policy, R510 \(Tuition\)](#)
- 2.4. [Regents Policy, R511 \(Tuition Disclosures and Consultation\)](#)

## **~~R510-3. General Policy~~**

~~**3.1. — Uniform First Tier Tuition Rate Increases:** A first tier tuition rate increase shall be uniform for all institutions, shall be implemented at the same time, and shall be based on evaluations of current data on inflation and national and regional tuition increases and justified by specific increasing needs in the Utah System of Higher Education.~~

~~**3.2. — Optional Second Tier Tuition Rate Increases:** Each institutional President, with the approval of the institutional Board of Trustees, may recommend a second tier tuition rate increase to meet specific institutional needs. Second tier tuition rate increases may apply to all programs equally or may be different for specific programs.~~

~~**3.3. — Application of Increases in Tuition Revenues in Appropriated Operating Budget Requests:** In developing its appropriated operating budget recommendations, it is the policy of the Board to include tuition revenues from projected additional annualized FTE enrollments as a portion of the projected financing for proposed expenditure increases to accommodate the additional students. Revenues from a proposed uniform first tier tuition rate increase pursuant to Section 3.1 will be included as partial financing for other proposed expenditure increases. Revenues from recommended second tier tuition rate increases pursuant to Section 3.2 will not be included as partial financing for other proposed expenditure increases.~~

~~**3.4. — Effective Date for New Tuition Schedules:** Tuition changes approved by the Board take effect for the subsequent semester.~~

<sup>1</sup> Approved October 24, 1986; amended June 19, 1987, August 7, 1987, July 27, 1990, March 21, 1992, September 18, 1992, November 6, 1992, September 24, 1993, September 23, 1994, November 4, 1994, June 23, 1995, November 3, 1995, August 1, 1996, September 11, 1997, November 13, 1998, January 21, 2000, March 17, 2000, March 16, 2001, March 14, 2002, July 2, 2002 and December 14, 2007, January 11, 2012, November 16, 2012, and May 16, 2014.

**3.5. — Resident/Nonresident Tuition Relationships:** Undergraduate nonresident tuition shall be set at no less than 3.0 times the institutional undergraduate resident tuition rate. The Board may grant exceptions on a case-by-case basis.

**3.6. — Graduate/Undergraduate Tuition Relationships:** Tuition for resident and non-resident graduate students will be set at no less than one hundred ten percent (110%) of tuition for undergraduate students. For this purpose, a graduate student is a student who has been formally admitted to a graduate program at the institution.

**3.7. — Annual Review for Fairness and Price Competitiveness:** Annually, the tuition relationship targets, comparisons with national and regional tuition and fee data, institutional cost data, general and course fee data, and other factors shall be reviewed to determine if modifications are necessary to maintain fairness and price competitiveness.

#### **R510-4. Tuition Charges**

**4.1. — Alternative Tuition Models:** Institutions may use either: (1) a linear tuition model, in which the incremental tuition charge per student credit hour is the same without regard to the number of hours for which a student is enrolled, or (2) a plateau model, in which students carrying a defined full-time load are charged a uniform rate within a defined range of credit hours.

**4.1.1. — Maximum Range for the Plateau Model:** The plateau, or number of credit hours for which a full-time tuition rate may be charged, may be any range between 10 and 20 credit hours. Where the plateau model is used, tuition per credit hour between one credit hour and the beginning of the plateau range shall increase in linear increments. Students enrolled for credit hours beyond the plateau range shall be charged at the same rate per credit hour as those before the plateau range.

**4.1.2. — Online Tuition:** Alternative tuition schedules for online courses may be authorized by the Board on a case-by-case basis

**4.2. — Differential Tuition:** Differential tuition schedules for undergraduate and graduate programs may be authorized by the Board on a case-by-case basis. In addition to initially approving differential tuition rates for academic programs, differential tuition increases beyond the regular institutional tuition increase proposal should be approved by the Board. The increased revenues from the differential tuition rate charges shall be used by the institution to benefit the impacted program and to help support related campus services. Institutions requesting differential tuition schedules should consult with students in the program and consider the following:

**4.2.1. —** the student and market demand for the program;

**4.2.2. —** the impact of differential tuition rates on student access and retention;

**4.2.3. —** the tuition rates of comparable programs at other institutions;

**4.2.4. —** the potential earnings capacity of program graduates; and

**4.2.5. —** the societal importance of the program.

**4.3. — Inclusion of Registration Costs:** Registration costs shall be included in tuition, not assessed as a separate fee category.

~~4.4.— **Apprenticeship Programs:** Tuition for courses offered specifically for apprenticeship programs shall be at least one-half of, and no greater than, tuition for other credit courses at the institution.~~

~~4.5.— **Non-Credit Programs:** Short-term intensive training (STIT) funds are appropriated by the Legislature to each participating USHE institution. Tuition for non-credit CTE programs funded with STIT dollars will be established by each institution at a level sufficient to cover program costs and in accordance with USHE guidelines and legislative intent.~~

~~4.6.— **Other Non-Credit Instruction:** Tuition for other non-credit programs and courses shall be established by each USHE institution. The total of all available funds, including tuition, shall be sufficient to pay the total direct cost of providing such programs and courses, in the aggregate, for the institution.~~

~~4.7.— **Summer School:** Resident summer school students shall be assessed the same tuition per credit hour or full-time load as that assessed resident students during the regular academic year.~~

~~4.8.— **Contract Credit Courses:** Charges for credit courses provided under contract to outside agencies shall be at least sufficient to pay the total direct costs of providing such courses, in the aggregate for the institution.~~

~~4.9.— **Continuing Education Credit Enrollments:** Students enrolled in Continuing Education credit courses other than contract courses shall be assessed tuition at no less than the regular charge per credit hour.~~

~~4.10.— **Medicine and Law:** Tuition for Medicine and Law programs will be considered separately.~~

~~4.11.— **Course Audit Registrations:** Students must register to audit any class. Such audit hours will be part of their total load and they shall pay tuition at the same rate as paid by students registering for credit in the course.~~

~~4.12.— **Correction Facility Program Tuition:** Reduced tuition for programs provided to inmates at state correctional facilities will be considered separately. The State Board of Education advisory council overseeing corrections education and recidivism reduction issues will determine inmate eligibility for participation in Board of Regents authorized tuition reductions.~~

~~4.13.— **Excess Credit Hours:** Institutional policies and practices shall encourage students not to accumulate credit hours beyond those needed to successfully complete a program of study.~~

~~4.13.1. **Definitions:** For the purpose of Section 4.13 only, the following terms are defined for the application of and administration of the excess credit hour surcharge.~~

~~4.13.1.1. **Program of study**—A group of academic courses required for a baccalaureate degree.~~

~~4.13.1.2. **Excess Credit Hour Surcharge**—For resident students, the surcharge amount to be charged is double the current year's resident tuition rates, pertaining to that institution, for the number of excess credit hours taken. Non-resident students paying non-resident tuition rates are not subject to excess credit hour surcharges.~~

~~**4.13.2. Excess Credit Hour Surcharge:** An institution may charge a student the excess credit surcharge subject to conditions set forth in Section 4.13.4 for credit hours in excess of 125% of a student's program of study.~~

~~**4.13.3. Notification:** Each USHE institution must establish a process by which students are notified of this policy when enrolling at the institution. Strategies to assist student completion shall be employed and may include such things as encouraging a student to meet with an adviser before or upon hitting the 125% of degree completion, and/or encouraging the student to establish a plan for program completion by meeting with a counselor or adviser.~~

#### ~~**4.13.4. Determination of Number of Credit Hours Necessary for the Program of Study**~~

~~**4.13.4.1. Allowances for Program of Study** The number of credit hours for completion of the program of study may include the hours needed for a double major, dual degree, additional minor, certification(s), and/or emphasis(es) related to the student's major area of study. Second bachelor degrees will also be allowed and will be considered new programs of study for purposes of the excess credit hour calculation.~~

~~**4.13.4.2. Credit Hours Excluded** Excluded from the calculation of the credits required for completion of a student's program of study are credit hours: (1) earned through concurrent enrollment, advanced placement, and credit by examination, (2) resulting from re-entry into the educational system by a student who may have accumulated a large number of credits, or even completed degrees, but where employment requirements obligate his or her return to college, (3) resulting from a defensible change in major, and (4) developmental education credit.~~

~~**4.14. Tuition Surcharge for Course Repetition:** Tuition for repeating a course more than once shall be charged at the full cost of the instruction unless the institution determines that the repetition is a result of illness, accident or other cause beyond the student's control or unless the course is prescribed by the student's program of study.~~

### ~~**R510-5. General Fees Other Than Tuition**~~

~~**5.1. — Approval by the Board:** All general student fees are subject to Board of Regents approval, normally in conjunction with annual determination of tuition rates. Course fees do not require Board approval but the Board will monitor such fees. Course fees will also be included in determining financial aid cost of attendance and the level of student contribution toward their total education costs.~~

~~**5.2. — Variation Among Institutions:** General fees other than tuition may vary according to specific institutional needs.~~

~~**5.3 — General Student Fee Policy:** Each USHE institution shall develop a student fee policy to address the following:~~

~~**5.3.1. Advisory Board:** Each institution shall establish a student fee advisory board to oversee the creation, review and maintenance of required student fees.~~

~~**5.3.1.1.** The advisory board membership shall include currently enrolled students.~~

**5.3.2 Institutional Policy:** The institutional policy shall contain processes for the student fee advisory board to follow in the creation, review and maintenance of student fees. The institutional policy shall include the following:

**5.3.2.1. Fee Creation:** The creation of new student fees shall be supported by a demonstrated need, clear statement describing the fee, and a sound budgetary plan.

**5.3.2.2. Fee Review:** The student fee advisory board shall periodically monitor and annually review student fees. Processes and discussions should focus primarily on—but not be limited to—the adequacy of the fee in accomplishing the stated objective. Fee account fund balances should be minimal or, in cases where fund balances are accumulating, be supported by a plan for use of the funding.

**5.3.2.3. Fee Maintenance:** Fee amounts may be increased or decreased as necessary to adequately accomplish the stated objective. Changes resulting from a fee increase shall be supported with adequate documentation describing the rationale for the increase and the planned uses of the additional fee revenue.

**5.3.3. Fee Reporting:** The student fee advisory board may require an annual report from each student fee program manager.

**5.4 Fee Percentage Rate Increase above 1<sup>st</sup> Tier Tuition Percentage Rate Increase:** If an institution is proposing to increase general student fees at a percentage rate greater than the percentage rate the system is proposing to increase 1<sup>st</sup> tier tuition, the institution shall submit a letter to the Board regarding fee increases from student leadership at the institution.

**5.5. Option to Waive General Student Fees:** General fees other than tuition may, at the institution's option, be waived in whole or in part for students.

### **R510R514-6.3. Refunds of tuition, fees, and other student charges**

**6.3.1. Refund Policy:** Each institution shall provide refunds of tuition, fees, housing and meal, and other student charges to all students who either fail to enroll or who withdraw after enrolling. The refunds shall be at least as large as prescribed in this policy. This policy is designed to provide a fair and equitable refund policy for all students who withdraw, whether or not receiving Federal student financial aid, and also for specific compliance with the provisions of Section 484B of the Federal Higher Education Act, as amended (20 USC 1091b.), as applicable to students who receive Federal student financial aid (Federal campus-based student financial aid, Federal Pell Grants, Leveraging Educational Assistance Partnership Program aid, Federal Family Education Loan Program loans or Federal Direct Student Loan Program loans), and who fail to register or who withdraw after enrolling.

**6.3.2. General Refund Policy for Students Who Withdraw from the Institution and Who Are Not First Time Enrollees in the Institution and Also Receiving Federal Student Financial Aid:** Students who are not first time enrollees in the institution and also receiving Federal student financial aid, both as defined in Federal regulations, 34 CFR Section 668.22 and who withdraw from the institution or drop courses shall be entitled to refunds of tuition, fees, and other student charges (including housing and meal contract charges) paid to the institution which meet or exceed the following requirements:

Refund Period	Portion Refundable
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Prior to 15th calendar day of the quarter, semester, or other period of enrollment	at least 70%
From the 15th calendar day to close of business on the 21st calendar day of the period of enrollment	at least 50%
After the 21st calendar day	none

**63.2.1. Non Refundability of Application, Admission, and Late Registration Fees:** Late registration, application and admission fees are not required to be refunded for students who are not enrolled at the institution for the first time in the current enrollment period and also receiving Federal student financial aid.

**63.2.2. Refunds in the Case of Meal Tickets or Contracts with Dollar Value Rather than Time Periods:** Where students purchase meal tickets or contracts with dollar value rather than covering specific time periods, a student who withdraws is entitled only to a refund of the unused portion of the dollar value of the ticket or contract.

**63.3. Special Pro Rata Refund Policy for Students Who Fail to Enroll or Who Withdraw from the Institution and Who are First Time Enrollees in the Institution and are Also Receiving Federal Student Financial Aid:** Any student who is a first time enrollee in the institution and is also receiving Federal student financial aid, both as defined in Federal regulations, 34 CFR Section 668.22 and who fails to register or who withdraws from the institution or otherwise fails to complete the period of enrollment for which registered, on or before the 60 percent point (in time) in the period of enrollment for which the student has paid tuition, fees, room and board, or other charges, shall be entitled to a pro rata refund of such tuition, fees, room and board, and other charges. The institution's pro rata refund policy for such students, and all calculations and determinations there under, are required to conform to the requirements of 34 CFR Section 668.22.

**63.4. Refunds for Students Who Withdraw from the Institution After the 60 Percent Point:** The institution may, but is not required to, provide for refunds for students described in Section 6.3 who withdraw from the institution after the 60 percent point (in time) in the period of enrollment for which the student has paid tuition, fees, room and board, or other charges.

**63.5. Exceptions for Hardship:** Refunds greater than provided for in this refund policy may be granted by the President or the President's designee for unusual hardship cases.

**R510-1. Purpose:** To establish a policy for the Utah System of Higher Education (USHE) to manage excess credit surcharges..

## R510-2. References

- 2.1. Utah Code §53B-7-101 (Combined Requests for Appropriations)
- 2.2. Federal Higher Education Act, 20 USC 1091b (Institutional Refunds)
- 2.3. Regents Policy, R510 (Tuition)
- 2.4. Regents Policy, R514 (Refunds of Tuition, Fees, and Other Student Charges)
- 2.5. Regents Policy, R511 (Tuition Disclosures and Consultation)

## R515-3. Definitions

3.1. For the purpose of Section 4.13 only, the following terms are defined for the application of and administration of the excess credit hour surcharge.

**3.1.1. Program of study-** A group of academic courses required for a baccalaureate degree.

**3.1.2. Excess Credit Hour Surcharge-** For resident students, the surcharge amount to be charged is double the current year's resident tuition rates, pertaining to that institution, for the number of excess credit hours taken. Non-resident students paying non-resident tuition rates are not subject to excess credit hour surcharges.

## R515-4. Policy

4.1. **Excess Credit Hours:** Institutional policies and practices shall encourage students not to accumulate credit hours beyond those needed to successfully complete a program of study.

4.2. **Excess Credit Hour Surcharge:** An institution may charge a student the excess credit surcharge subject to conditions set forth in Section 4.13.4 for credit hours in excess of 125% of a student's program of study.

4.3. **Notification:** Each USHE institution must establish a process by which students are notified of this policy when enrolling at the institution. Strategies to assist student completion shall be employed and may include such things as encouraging a student to meet with an adviser before or upon hitting the 125% of degree completion, and/or encouraging the student to establish a plan for program completion by meeting with a counselor or advisor.

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<sup>1</sup> Approved October 24, 1986; amended June 19, 1987, August 7, 1987, July 27, 1990, March 21, 1992, September 18, 1992, November 6, 1992, September 24, 1993, September 23, 1994, November 4, 1994, June 23, 1995, November 3, 1995, August 1, 1996, September 11, 1997, November 13, 1998, January 21, 2000, March 17, 2000, March 16, 2001, March 14, 2002, July 2, 2002 and December 14, 2007, January 11, 2012, November 16, 2012, and May 16, 2014.

#### 4.4. **Determination of Number of Credit Hours Necessary for the Program of Study**

**4.4.1. Allowances for Program of Study-** The number of credit hours for completion of the program of study may include the hours needed for a double major, dual degree, additional minor, certification(s), and/or emphasis(es) related to the student's major area of study. Second bachelor degrees will also be allowed and will be considered new programs of study for purposes of the excess credit hour calculation.

**4.4.2. Credit Hours Excluded-** Excluded from the calculation of the credits required for completion of a student's program of study are credit hours: (1) earned through concurrent enrollment, advanced placement, and credit by examination, (2) resulting from re-entry into the educational system by a student who may have accumulated a large number of credits, or even completed degrees, but where employment requirements obligate his or her return to college, (3) resulting from a defensible change in major, and (4) developmental education credit.

**4.5. Tuition Surcharge for Course Repetition:** Tuition for repeating a course more than once shall be charged at the full cost of the instruction unless the institution determines that the repetition is a result of illness, accident or other cause beyond the student's control or unless the course is prescribed by the student's program of study.



## ~~R510~~R515, Excess Credit Hour Surcharges ~~Tuition and Fees~~<sup>1</sup>

**R510-1. Purpose:** To establish a policy for the Utah System of Higher Education (USHE) to manage excess credit surcharges.~~To establish a tuition and general fee policy.~~

### R510-2. References

- 2.1. Utah Code §53B-7-101 (Combined Requests for Appropriations)
- 2.2. Federal Higher Education Act, 20 USC 1091b (Institutional Refunds)
- 2.3. Regents Policy, R510 (Tuition)
- 2.4. Regents Policy, R514 (Refunds of Tuition, Fees, and Other Student Charges)
- 2.5. Regents Policy, R511 (Tuition Disclosures and Consultation)

### ~~R510~~R515-3. General Policy~~Definitions~~

~~3.1. — **Uniform First Tier Tuition Rate Increases:** A first tier tuition rate increase shall be uniform for all institutions, shall be implemented at the same time, and shall be based on evaluations of current data on inflation and national and regional tuition increases and justified by specific increasing needs in the Utah System of Higher Education.~~

~~3.2. — **Optional Second Tier Tuition Rate Increases:** Each institutional President, with the approval of the institutional Board of Trustees, may recommend a second tier tuition rate increase to meet specific institutional needs. Second tier tuition rate increases may apply to all programs equally or may be different for specific programs.~~

~~3.3. — **Application of Increases in Tuition Revenues in Appropriated Operating Budget Requests:** In developing its appropriated operating budget recommendations, it is the policy of the Board to include tuition revenues from projected additional annualized FTE enrollments as a portion of the projected financing for proposed expenditure increases to accommodate the additional students. Revenues from a proposed uniform first tier tuition rate increase pursuant to Section 3.1 will be included as partial financing for other proposed expenditure increases. Revenues from recommended second tier tuition rate increases pursuant to Section 3.2 will not be included as partial financing for other proposed expenditure increases.~~

~~3.4. — **Effective Date for New Tuition Schedules:** Tuition changes approved by the Board take effect for the subsequent semester.~~

<sup>1</sup> Approved October 24, 1986; amended June 19, 1987, August 7, 1987, July 27, 1990, March 21, 1992, September 18, 1992, November 6, 1992, September 24, 1993, September 23, 1994, November 4, 1994, June 23, 1995, November 3, 1995, August 1, 1996, September 11, 1997, November 13, 1998, January 21, 2000, March 17, 2000, March 16, 2001, March 14, 2002, July 2, 2002 and December 14, 2007, January 11, 2012, November 16, 2012, and May 16, 2014.

**3.5. — Resident/Nonresident Tuition Relationships:** Undergraduate nonresident tuition shall be set at no less than 3.0 times the institutional undergraduate resident tuition rate. The Board may grant exceptions on a case-by-case basis.

**3.6. — Graduate/Undergraduate Tuition Relationships:** Tuition for resident and non-resident graduate students will be set at no less than one hundred ten percent (110%) of tuition for undergraduate students. For this purpose, a graduate student is a student who has been formally admitted to a graduate program at the institution.

**3.7. — Annual Review for Fairness and Price Competitiveness:** Annually, the tuition relationship targets, comparisons with national and regional tuition and fee data, institutional cost data, general and course fee data, and other factors shall be reviewed to determine if modifications are necessary to maintain fairness and price competitiveness.

#### **R510-4. Tuition Charges**

**4.1. — Alternative Tuition Models:** Institutions may use either: (1) a linear tuition model, in which the incremental tuition charge per student credit hour is the same without regard to the number of hours for which a student is enrolled, or (2) a plateau model, in which students carrying a defined full-time load are charged a uniform rate within a defined range of credit hours.

———— **4.1.1. — Maximum Range for the Plateau Model:** The plateau, or number of credit hours for which a full-time tuition rate may be charged, may be any range between 10 and 20 credit hours. Where the plateau model is used, tuition per credit hour between one credit hour and the beginning of the plateau range shall increase in linear increments. Students enrolled for credit hours beyond the plateau range shall be charged at the same rate per credit hour as those before the plateau range.

———— **4.1.2. — Online Tuition:** Alternative tuition schedules for online courses may be authorized by the Board on a case-by-case basis

**4.2. — Differential Tuition:** Differential tuition schedules for undergraduate and graduate programs may be authorized by the Board on a case-by-case basis. In addition to initially approving differential tuition rates for academic programs, differential tuition increases beyond the regular institutional tuition increase proposal should be approved by the Board. The increased revenues from the differential tuition rate charges shall be used by the institution to benefit the impacted program and to help support related campus services. Institutions requesting differential tuition schedules should consult with students in the program and consider the following:

———— **4.2.1. —** the student and market demand for the program;

———— **4.2.2. —** the impact of differential tuition rates on student access and retention;

———— **4.2.3. —** the tuition rates of comparable programs at other institutions;

———— **4.2.4. —** the potential earnings capacity of program graduates; and

———— **4.2.5. —** the societal importance of the program.

**4.3. — Inclusion of Registration Costs:** Registration costs shall be included in tuition, not assessed as a separate fee category.

~~4.4. — **Apprenticeship Programs:** Tuition for courses offered specifically for apprenticeship programs shall be at least one-half of, and no greater than, tuition for other credit courses at the institution.~~

~~4.5. — **Non-Credit Programs:** Short-term intensive training (STIT) funds are appropriated by the Legislature to each participating USHE institution. Tuition for non-credit CTE programs funded with STIT dollars will be established by each institution at a level sufficient to cover program costs and in accordance with USHE guidelines and legislative intent.~~

~~4.6. — **Other Non-Credit Instruction:** Tuition for other non-credit programs and courses shall be established by each USHE institution. The total of all available funds, including tuition, shall be sufficient to pay the total direct cost of providing such programs and courses, in the aggregate, for the institution.~~

~~4.7. — **Summer School:** Resident summer school students shall be assessed the same tuition per credit hour or full-time load as that assessed resident students during the regular academic year.~~

~~4.8. — **Contract Credit Courses:** Charges for credit courses provided under contract to outside agencies shall be at least sufficient to pay the total direct costs of providing such courses, in the aggregate for the institution.~~

~~4.9. — **Continuing Education Credit Enrollments:** Students enrolled in Continuing Education credit courses other than contract courses shall be assessed tuition at no less than the regular charge per credit hour.~~

~~4.10. — **Medicine and Law:** Tuition for Medicine and Law programs will be considered separately.~~

~~4.11. — **Course Audit Registrations:** Students must register to audit any class. Such audit hours will be part of their total load and they shall pay tuition at the same rate as paid by students registering for credit in the course.~~

~~4.12. — **Correction Facility Program Tuition:** Reduced tuition for programs provided to inmates at state correctional facilities will be considered separately. The State Board of Education advisory council overseeing corrections education and recidivism reduction issues will determine inmate eligibility for participation in Board of Regents authorized tuition reductions.~~

~~4.13.1. **Excess Credit Hours:** Institutional policies and practices shall encourage students not to accumulate credit hours beyond those needed to successfully complete a program of study.~~

~~4.13.1. **Definitions:** For the purpose of Section 4.13 only, the following terms are defined for the application of and administration of the excess credit hour surcharge.~~

~~4.13.1.1. **Program of study-** A group of academic courses required for a baccalaureate degree.~~

~~4.13.1.2. **Excess Credit Hour Surcharge-** For resident students, the surcharge amount to be charged is double the current year's resident tuition rates, pertaining to that institution, for the number of excess credit hours taken. Non-resident students paying non-resident tuition rates are not subject to excess credit hour surcharges.~~

4.1. **Excess Credit Hours:** Institutional policies and practices shall encourage students not to accumulate credit hours beyond those needed to successfully complete a program of study.

**4.13.2. Excess Credit Hour Surcharge:** An institution may charge a student the excess credit surcharge subject to conditions set forth in Section 4.13.4 for credit hours in excess of 125% of a student's program of study.

**4.13.3. Notification:** Each USHE institution must establish a process by which students are notified of this policy when enrolling at the institution. Strategies to assist student completion shall be employed and may include such things as encouraging a student to meet with an adviser before or upon hitting the 125% of degree completion, and/or encouraging the student to establish a plan for program completion by meeting with a counselor or advisor.

**4.13.4. Determination of Number of Credit Hours Necessary for the Program of Study**

**4.13.4.1. Allowances for Program of Study-** The number of credit hours for completion of the program of study may include the hours needed for a double major, dual degree, additional minor, certification(s), and/or emphasis(es) related to the student's major area of study. Second bachelor degrees will also be allowed and will be considered new programs of study for purposes of the excess credit hour calculation.

**4.13.4.2. Credit Hours Excluded-** Excluded from the calculation of the credits required for completion of a student's program of study are credit hours: (1) earned through concurrent enrollment, advanced placement, and credit by examination, (2) resulting from re-entry into the educational system by a student who may have accumulated a large number of credits, or even completed degrees, but where employment requirements obligate his or her return to college, (3) resulting from a defensible change in major, and (4) developmental education credit.

**4.145. Tuition Surcharge for Course Repetition:** Tuition for repeating a course more than once shall be charged at the full cost of the instruction unless the institution determines that the repetition is a result of illness, accident or other cause beyond the student's control or unless the course is prescribed by the student's program of study.

**~~R510-5. General Fees Other Than Tuition~~**

~~5.1. Approval by the Board: All general student fees are subject to Board of Regents approval, normally in conjunction with annual determination of tuition rates. Course fees do not require Board approval but the Board will monitor such fees. Course fees will also be included in determining financial aid cost-of attendance and the level of student contribution toward their total education costs.~~

~~5.2. Variation Among Institutions: General fees other than tuition may vary according to specific institutional needs.~~

~~5.3. General Student Fee Policy: Each USHE institution shall develop a student fee policy to address the following:~~

~~**5.3.1. Advisory Board:** Each institution shall establish a student fee advisory board to oversee the creation, review and maintenance of required student fees.~~

~~**5.3.1.1.** The advisory board membership shall include currently enrolled students.~~

~~**5.3.2 Institutional Policy:** The institutional policy shall contain processes for the student fee advisory board to follow in the creation, review and maintenance of student fees. The institutional policy shall include the following:~~

~~**5.3.2.1. Fee Creation:** The creation of new student fees shall be supported by a demonstrated need, clear statement describing the fee, and a sound budgetary plan.~~

~~**5.3.2.2. Fee Review:** The student fee advisory board shall periodically monitor and annually review student fees. Processes and discussions should focus primarily on—but not be limited to—the adequacy of the fee in accomplishing the stated objective. Fee account fund balances should be minimal or, in cases where fund balances are accumulating, be supported by a plan for use of the funding.~~

~~**5.3.2.3. Fee Maintenance:** Fee amounts may be increased or decreased as necessary to adequately accomplish the stated objective. Changes resulting from a fee increase shall be supported with adequate documentation describing the rationale for the increase and the planned uses of the additional fee revenue.~~

~~**5.3.3. Fee Reporting:** The student fee advisory board may require an annual report from each student fee program manager.~~

~~**5.4 — Fee Percentage Rate Increase above 1<sup>st</sup> Tier Tuition Percentage Rate Increase:** If an institution is proposing to increase general student fees at a percentage rate greater than the percentage rate the system is proposing to increase 1<sup>st</sup> tier tuition, the institution shall submit a letter to the Board regarding fee increases from student leadership at the institution. —~~

~~**5.5. — Option to Waive General Student Fees:** General fees other than tuition may, at the institution's option, be waived in whole or in part for students.~~

## **R510-6 . Refunds of tuition, fees, and other student charges**

~~**6.1. — Refund Policy:** Each institution shall provide refunds of tuition, fees, housing and meal, and other student charges to all students who either fail to enroll or who withdraw after enrolling. The refunds shall be at least as large as prescribed in this policy. This policy is designed to provide a fair and equitable refund policy for all students who withdraw, whether or not receiving Federal student financial aid, and also for specific compliance with the provisions of Section 484B of the Federal Higher Education Act, as amended (20 USC 1091b.), as applicable to students who receive Federal student financial aid (Federal campus-based student financial aid, Federal Pell Grants, Leveraging Educational Assistance Partnership Program aid, Federal Family Education Loan Program loans or Federal Direct Student Loan Program loans), and who fail to register or who withdraw after enrolling.~~

~~**6.2. — General Refund Policy for Students Who Withdraw from the Institution and Who Are Not First Time Enrollees in the Institution and Also Receiving Federal Student Financial Aid:**~~

Students who are not first time enrollees in the institution and also receiving Federal student financial aid, both as defined in Federal regulations, 34 CFR Section 668.22 and who withdraw from the institution or drop courses shall be entitled to refunds of tuition, fees, and other student charges (including housing and meal contract charges) paid to the institution which meet or exceed the following requirements:

Refund Period	Portion Refundable
Prior to 15th calendar day of the quarter, semester, or other period of enrollment	at least 70%
From the 15th calendar day to close of business on the 21st calendar day of the period of enrollment	at least 50%
After the 21st calendar day	none

**6.2.1.— Non Refundability of Application, Admission, and Late Registration Fees:** Late registration, application and admission fees are not required to be refunded for students who are not enrolled at the institution for the first time in the current enrollment period and also receiving Federal student financial aid.

**6.2.2.— Refunds in the Case of Meal Tickets or Contracts with Dollar Value Rather than Time Periods:** Where students purchase meal tickets or contracts with dollar value rather than covering specific time periods, a student who withdraws is entitled only to a refund of the unused portion of the dollar value of the ticket or contract.

**6.3.— Special Pro Rata Refund Policy for Students Who Fail to Enroll or Who Withdraw from the Institution and Who are First Time Enrollees in the Institution and are Also Receiving Federal Student Financial Aid:** Any student who is a first time enrollee in the institution and is also receiving Federal student financial aid, both as defined in Federal regulations, 34 CFR Section 668.22 and who fails to register or who withdraws from the institution or otherwise fails to complete the period of enrollment for which registered, on or before the 60 percent point (in time) in the period of enrollment for which the student has paid tuition, fees, room and board, or other charges, shall be entitled to a pro rata refund of such tuition, fees, room and board, and other charges. The institution's pro rata refund policy for such students, and all calculations and determinations there under, are required to conform to the requirements of 34 CFR Section 668.22.

**6.4.— Refunds for Students Who Withdraw from the Institution After the 60 Percent Point:** The institution may, but is not required to, provide for refunds for students described in Section 6.3 who withdraw from the institution after the 60 percent point (in time) in the period of enrollment for which the student has paid tuition, fees, room and board, or other charges.

**6.5.— Exceptions for Hardship:** Refunds greater than provided for in this refund policy may be granted by the President or the President's designee for unusual hardship cases.

**R510-1. Purpose:** To establish a student fee policy for the Utah System of Higher Education (USHE).

## R510-2. References

- 2.1. Utah Code §53B-7-101 (Combined Requests for Appropriations)
- 2.2. Federal Higher Education Act, 20 USC 1091b (Institutional Refunds)
- 2.3. Regents Policy, R510 (Tuition)
- 2.4. Regents Policy, R514 (Refunds of Tuition, Fees, and Other Student Charges)
- 2.5. Regents Policy, R511 (Tuition Disclosures and Consultation)

## R510-3. Policy

**3.1. Approval by the Board:** All general student fees are subject to Board of Regents approval, normally in conjunction with annual determination of tuition rates. Course fees do not require Board approval but the Board will monitor such fees. Course fees will also be included in determining financial aid cost of attendance and the level of student contribution toward their total education costs. General fees other than tuition may vary according to specific institutional needs.

**3.2. Advisory Board:** Each institution shall establish a student fee advisory board to oversee the creation, review and maintenance of required student fees and the advisory board membership shall include currently enrolled students.

**3.3. Institutional Policy:** Each USHE institution shall develop a student fee policy establishing processes that will govern how student fee advisory boards create, review and maintain student fees. The institutional policy shall include the following:

**3.3.1. Fee Creation:** The creation of new student fees shall be supported by a demonstrated need, clear statement describing the fee, and a sound budgetary plan.

**3.3.2. Fee Review:** The student fee advisory board shall periodically monitor and annually review student fees. Processes and discussions should focus primarily on— but not be limited to—the adequacy of the fee in accomplishing the stated objective. Fee account fund balances should be minimal or, in cases where fund balances are accumulating, be supported by a plan for use of the funding.

**3.3.3. Fee Maintenance:** Fee amounts may be increased or decreased as necessary to adequately accomplish the stated objective. Changes resulting from a fee increase shall be

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<sup>1</sup> Approved October 24, 1986; amended June 19, 1987, August 7, 1987, July 27, 1990, March 21, 1992, September 18, 1992, November 6, 1992, September 24, 1993, September 23, 1994, November 4, 1994, June 23, 1995, November 3, 1995, August 1, 1996, September 11, 1997, November 13, 1998, January 21, 2000, March 17, 2000, March 16, 2001, March 14, 2002, July 2, 2002 and December 14, 2007, January 11, 2012, November 16, 2012, and May 16, 2014.

supported with adequate documentation describing the rationale for the increase and the planned uses of the additional fee revenue.

**3.4. Fee Reporting:** The student fee advisory board may require an annual report from each student fee program manager.

**3.5. Demonstrated Student Support:** If an institution is proposing to increase general student fees, the institution shall submit a letter to the Board regarding fee increases from student leadership at the institution.

**3.6. Option to Waive General Student Fees:** General fees other than tuition may, at the institution's option, be waived in whole or in part for students.



## R510R516, Tuition and General Student Fees<sup>1</sup>

**R510-1. Purpose:** ~~To establish a student fee policy for the Utah System of Higher Education (USHE).~~ ~~To establish a tuition and general fee policy.~~

### R510-2. References

- 2.1. Utah Code §53B-7-101 (Combined Requests for Appropriations)
- 2.2. Federal Higher Education Act, 20 USC 1091b (Institutional Refunds)
- 2.3. Regents Policy, R510 (Tuition)
- 2.4. Regents Policy, R514 (Refunds of Tuition, Fees, and Other Student Charges)
- 2.5. Regents Policy, R511 (Tuition Disclosures and Consultation)

### R510-3. General Policy

~~**3.1. — Uniform First Tier Tuition Rate Increases:** A first tier tuition rate increase shall be uniform for all institutions, shall be implemented at the same time, and shall be based on evaluations of current data on inflation and national and regional tuition increases and justified by specific increasing needs in the Utah System of Higher Education.~~

~~**3.2. — Optional Second Tier Tuition Rate Increases:** Each institutional President, with the approval of the institutional Board of Trustees, may recommend a second tier tuition rate increase to meet specific institutional needs. Second tier tuition rate increases may apply to all programs equally or may be different for specific programs.~~

~~**3.3. — Application of Increases in Tuition Revenues in Appropriated Operating Budget Requests:** In developing its appropriated operating budget recommendations, it is the policy of the Board to include tuition revenues from projected additional annualized FTE enrollments as a portion of the projected financing for proposed expenditure increases to accommodate the additional students. Revenues from a proposed uniform first tier tuition rate increase pursuant to Section 3.1 will be included as partial financing for other proposed expenditure increases. Revenues from recommended second tier tuition rate increases pursuant to Section 3.2 will not be included as partial financing for other proposed expenditure increases.~~

~~**3.4. — Effective Date for New Tuition Schedules:** Tuition changes approved by the Board take effect for the subsequent semester.~~

<sup>1</sup> Approved October 24, 1986; amended June 19, 1987, August 7, 1987, July 27, 1990, March 21, 1992, September 18, 1992, November 6, 1992, September 24, 1993, September 23, 1994, November 4, 1994, June 23, 1995, November 3, 1995, August 1, 1996, September 11, 1997, November 13, 1998, January 21, 2000, March 17, 2000, March 16, 2001, March 14, 2002, July 2, 2002 and December 14, 2007, January 11, 2012, November 16, 2012, and May 16, 2014.

**3.5. — Resident/Nonresident Tuition Relationships:** Undergraduate nonresident tuition shall be set at no less than 3.0 times the institutional undergraduate resident tuition rate. The Board may grant exceptions on a case-by-case basis.

**3.6. — Graduate/Undergraduate Tuition Relationships:** Tuition for resident and non-resident graduate students will be set at no less than one hundred ten percent (110%) of tuition for undergraduate students. For this purpose, a graduate student is a student who has been formally admitted to a graduate program at the institution.

**3.7. — Annual Review for Fairness and Price Competitiveness:** Annually, the tuition relationship targets, comparisons with national and regional tuition and fee data, institutional cost data, general and course fee data, and other factors shall be reviewed to determine if modifications are necessary to maintain fairness and price competitiveness.

#### **R510-4. Tuition Charges**

**4.1. — Alternative Tuition Models:** Institutions may use either: (1) a linear tuition model, in which the incremental tuition charge per student credit hour is the same without regard to the number of hours for which a student is enrolled, or (2) a plateau model, in which students carrying a defined full-time load are charged a uniform rate within a defined range of credit hours.

**4.1.1. — Maximum Range for the Plateau Model:** The plateau, or number of credit hours for which a full-time tuition rate may be charged, may be any range between 10 and 20 credit hours. Where the plateau model is used, tuition per credit hour between one credit hour and the beginning of the plateau range shall increase in linear increments. Students enrolled for credit hours beyond the plateau range shall be charged at the same rate per credit hour as those before the plateau range.

**4.1.2. — Online Tuition:** Alternative tuition schedules for online courses may be authorized by the Board on a case-by-case basis

**4.2. — Differential Tuition:** Differential tuition schedules for undergraduate and graduate programs may be authorized by the Board on a case-by-case basis. In addition to initially approving differential tuition rates for academic programs, differential tuition increases beyond the regular institutional tuition increase proposal should be approved by the Board. The increased revenues from the differential tuition rate charges shall be used by the institution to benefit the impacted program and to help support related campus services. Institutions requesting differential tuition schedules should consult with students in the program and consider the following:

**4.2.1. —** the student and market demand for the program;

**4.2.2. —** the impact of differential tuition rates on student access and retention;

**4.2.3. —** the tuition rates of comparable programs at other institutions;

**4.2.4. —** the potential earnings capacity of program graduates; and

**4.2.5. —** the societal importance of the program.

**4.3. — Inclusion of Registration Costs:** Registration costs shall be included in tuition, not assessed as a separate fee category.

~~4.4.— **Apprenticeship Programs:** Tuition for courses offered specifically for apprenticeship programs shall be at least one-half of, and no greater than, tuition for other credit courses at the institution.~~

~~4.5.— **Non-Credit Programs:** Short-term intensive training (STIT) funds are appropriated by the Legislature to each participating USHE institution. Tuition for non-credit CTE programs funded with STIT dollars will be established by each institution at a level sufficient to cover program costs and in accordance with USHE guidelines and legislative intent.~~

~~4.6.— **Other Non-Credit Instruction:** Tuition for other non-credit programs and courses shall be established by each USHE institution. The total of all available funds, including tuition, shall be sufficient to pay the total direct cost of providing such programs and courses, in the aggregate, for the institution.~~

~~4.7.— **Summer School:** Resident summer school students shall be assessed the same tuition per credit hour or full-time load as that assessed resident students during the regular academic year.~~

~~4.8.— **Contract Credit Courses:** Charges for credit courses provided under contract to outside agencies shall be at least sufficient to pay the total direct costs of providing such courses, in the aggregate for the institution.~~

~~4.9.— **Continuing Education Credit Enrollments:** Students enrolled in Continuing Education credit courses other than contract courses shall be assessed tuition at no less than the regular charge per credit hour.~~

~~4.10.— **Medicine and Law:** Tuition for Medicine and Law programs will be considered separately.~~

~~4.11.— **Course Audit Registrations:** Students must register to audit any class. Such audit hours will be part of their total load and they shall pay tuition at the same rate as paid by students registering for credit in the course.~~

~~4.12.— **Correction Facility Program Tuition:** Reduced tuition for programs provided to inmates at state correctional facilities will be considered separately. The State Board of Education advisory council overseeing corrections education and recidivism reduction issues will determine inmate eligibility for participation in Board of Regents authorized tuition reductions.~~

~~4.13.— **Excess Credit Hours:** Institutional policies and practices shall encourage students not to accumulate credit hours beyond those needed to successfully complete a program of study.~~

~~4.13.1. **Definitions:** For the purpose of Section 4.13 only, the following terms are defined for the application of and administration of the excess credit hour surcharge.~~

~~4.13.1.1. **Program of study**—A group of academic courses required for a baccalaureate degree.~~

~~4.13.1.2. **Excess Credit Hour Surcharge**—For resident students, the surcharge amount to be charged is double the current year's resident tuition rates, pertaining to that institution, for the number of excess credit hours taken. Non-resident students paying non-resident tuition rates are not subject to excess credit hour surcharges.~~

~~4.13.2. Excess Credit Hour Surcharge:~~ An institution may charge a student the excess credit surcharge subject to conditions set forth in Section 4.13.4 for credit hours in excess of 125% of a student's program of study.

~~4.13.3. Notification:~~ Each USHE institution must establish a process by which students are notified of this policy when enrolling at the institution. Strategies to assist student completion shall be employed and may include such things as encouraging a student to meet with an adviser before or upon hitting the 125% of degree completion, and/or encouraging the student to establish a plan for program completion by meeting with a counselor or adviser.

#### ~~4.13.4. Determination of Number of Credit Hours Necessary for the Program of Study~~

~~4.13.4.1. Allowances for Program of Study~~ The number of credit hours for completion of the program of study may include the hours needed for a double major, dual degree, additional minor, certification(s), and/or emphasis(es) related to the student's major area of study. Second bachelor degrees will also be allowed and will be considered new programs of study for purposes of the excess credit hour calculation.

~~4.13.4.2. Credit Hours Excluded~~ Excluded from the calculation of the credits required for completion of a student's program of study are credit hours: (1) earned through concurrent enrollment, advanced placement, and credit by examination, (2) resulting from re-entry into the educational system by a student who may have accumulated a large number of credits, or even completed degrees, but where employment requirements obligate his or her return to college, (3) resulting from a defensible change in major, and (4) developmental education credit.

~~4.14. Tuition Surcharge for Course Repetition:~~ Tuition for repeating a course more than once shall be charged at the full cost of the instruction unless the institution determines that the repetition is a result of illness, accident or other cause beyond the student's control or unless the course is prescribed by the student's program of study.

### ~~R510-5. General Fees Other Than Tuition~~

~~53.1. Approval by the Board:~~ All general student fees are subject to Board of Regents approval, normally in conjunction with annual determination of tuition rates. Course fees do not require Board approval but the Board will monitor such fees. Course fees will also be included in determining financial aid cost of attendance and the level of student contribution toward their total education costs.

~~5.2. Variation Among Institutions:~~ General fees other than tuition may vary according to specific institutional needs.

~~3.2. Advisory Board:~~ Each institution shall establish a student fee advisory board to oversee the creation, review and maintenance of required student fees and the advisory board membership shall include currently enrolled students.

~~53.3~~ ~~3.~~ ~~General Student Fee Policy~~ ~~Institutional Policy:~~ Each USHE institution shall develop a student fee policy establishing processes that will govern how student fee advisory boards create, review and maintain student fees. The institutional policy shall include the following: ~~Each USHE institution shall develop a student fee policy to address the following:~~

~~5.3.1. Advisory Board: Each institution shall establish a student fee advisory board to oversee the creation, review and maintenance of required student fees.~~

~~5.3.1.1. The advisory board membership shall include currently enrolled students.~~

~~5.3.2 Institutional Policy: The institutional policy shall contain processes for the student fee advisory board to follow in the creation, review and maintenance of student fees. The institutional policy shall include the following:~~

~~5.3.2.1. Fee Creation: The creation of new student fees shall be supported by a demonstrated need, clear statement describing the fee, and a sound budgetary plan.~~

~~5.3.2.2. Fee Review: The student fee advisory board shall periodically monitor and annually review student fees. Processes and discussions should focus primarily on— but not be limited to— the adequacy of the fee in accomplishing the stated objective. Fee account fund balances should be minimal or, in cases where fund balances are accumulating, be supported by a plan for use of the funding.~~

~~5.3.2.3. Fee Maintenance: Fee amounts may be increased or decreased as necessary to adequately accomplish the stated objective. Changes resulting from a fee increase shall be supported with adequate documentation describing the rationale for the increase and the planned uses of the additional fee revenue.~~

~~5.3.34. Fee Reporting: The student fee advisory board may require an annual report from each student fee program manager.~~

~~5.3.45. Fee Percentage Rate Increase above 1<sup>st</sup> Tier Tuition Percentage Rate Increase Demonstrated Student Support: If an institution is proposing to increase general student fees at a percentage rate greater than the percentage rate the system is proposing to increase 1<sup>st</sup> tier tuition, the institution shall submit a letter to the Board regarding fee increases from student leadership at the institution.~~

~~5.53.6. Option to Waive General Student Fees: General fees other than tuition may, at the institution's option, be waived in whole or in part for students.~~

## ~~R510-6. Refunds of tuition, fees, and other student charges~~

~~6.1. Refund Policy: Each institution shall provide refunds of tuition, fees, housing and meal, and other student charges to all students who either fail to enroll or who withdraw after enrolling. The refunds shall be at least as large as prescribed in this policy. This policy is designed to provide a fair and equitable refund policy for all students who withdraw, whether or not receiving Federal student financial aid, and also for specific compliance with the provisions of Section 484B of the Federal Higher Education Act, as amended (20 USC 1091b.), as applicable to students who receive Federal student financial aid (Federal campus-based student financial aid, Federal Pell Grants, Leveraging Educational Assistance Partnership Program aid, Federal Family Education Loan Program loans or Federal Direct Student Loan Program loans), and who fail to register or who withdraw after enrolling.~~

~~6.2. General Refund Policy for Students Who Withdraw from the Institution and Who Are Not First Time Enrollees in the Institution and Also Receiving Federal Student Financial Aid: Students~~

who are not first time enrollees in the institution and also receiving Federal student financial aid, both as defined in Federal regulations, 34 CFR Section 668.22 and who withdraw from the institution or drop courses shall be entitled to refunds of tuition, fees, and other student charges (including housing and meal contract charges) paid to the institution which meet or exceed the following requirements:

Refund Period	Portion Refundable
Prior to 15th calendar day of the quarter, semester, or other period of enrollment	at least 70%
From the 15th calendar day to close of business on the 21st calendar day of the period of enrollment	at least 50%
After the 21st calendar day	none

**6.2.1.— Non Refundability of Application, Admission, and Late Registration Fees:** Late registration, application and admission fees are not required to be refunded for students who are not enrolled at the institution for the first time in the current enrollment period and also receiving Federal student financial aid.

**6.2.2.— Refunds in the Case of Meal Tickets or Contracts with Dollar Value Rather than Time Periods:** Where students purchase meal tickets or contracts with dollar value rather than covering specific time periods, a student who withdraws is entitled only to a refund of the unused portion of the dollar value of the ticket or contract.

**6.3.— Special Pro Rata Refund Policy for Students Who Fail to Enroll or Who Withdraw from the Institution and Who are First Time Enrollees in the Institution and are Also Receiving Federal Student Financial Aid:** Any student who is a first time enrollee in the institution and is also receiving Federal student financial aid, both as defined in Federal regulations, 34 CFR Section 668.22 and who fails to register or who withdraws from the institution or otherwise fails to complete the period of enrollment for which registered, on or before the 60 percent point (in time) in the period of enrollment for which the student has paid tuition, fees, room and board, or other charges, shall be entitled to a pro rata refund of such tuition, fees, room and board, and other charges. The institution's pro rata refund policy for such students, and all calculations and determinations there under, are required to conform to the requirements of 34 CFR Section 668.22.

**6.4.— Refunds for Students Who Withdraw from the Institution After the 60 Percent Point:** The institution may, but is not required to, provide for refunds for students described in Section 6.3 who withdraw from the institution after the 60 percent point (in time) in the period of enrollment for which the student has paid tuition, fees, room and board, or other charges.

**6.5.— Exceptions for Hardship:** Refunds greater than provided for in this refund policy may be granted by the President or the President's designee for unusual hardship cases.