



UTAH SYSTEM OF  
HIGHER EDUCATION

# MEMORANDUM

TAB D

September 16, 2021

## **Revision and Renaming of Policy R207, *Institutional Residences for Colleges and Universities***

As part of the ongoing process to review and update Board policies, the Commissioner's Office recommends amendments to policy R207, *Institutional Residences for Colleges and Universities in the Utah System of Higher Education*, including:

- Changing the policy number and title to R715, *Institutional Residences*
- Updating references, definitions, and policy to reflect changes in statute and to improve readability
- Clarifying the policy of the Board is to provide a housing allowance for presidents of degree-granting institutions and that when appropriate, the Board may designate an official residence
- Clarifying the process for designating an official institutional residence
- Defining criteria and processes for the disposal or conversion of a current institutional residence
- Clarifying the policy does not apply to the Commissioner of Higher Education

A redline and clean version of the amended policy are included in the attachments.

### **Commissioner's Recommendation**

The Commissioner recommends the Board adopt changes to policy R207 effective immediately and rename and renumber the policy R715, *Institutional Residences*.

### **Attachments**



## R715, Institutional Residences<sup>1</sup>

**R715-1 Purpose:** To govern the designation, acquisition, operation, and disposal of an institutional residence for degree-granting institutions.

### **R-715-2 References**

2.1 Utah Code §53B-2-102, Board to Appoint President of Each Institution

2.2 **Board** Policy R205, Presidential Appointment, Compensation, and Benefits

**R715-3 Institutional Residences in the System of Higher Education:** The general policy of the Board is to provide a housing allowance for presidents of degree-granting institutions. In certain limited circumstances, the provision and maintenance of institutional residences may serve the best interests of the institution and the System, in which case the board may designate an official institutional residence for a degree-granting institution.

**R715-4 Functions of an Official Institutional Residence:** The Board may designate an official institutional residence for a degree-granting institution, located on or near the campus, owned and maintained by the institution, and occupied by the President as a condition of employment. Such a residence is considered an institutional resource to be used for the convenience and benefit of the institution. The institutional residence may be the President's official residence and shall be used substantially for both administrative and social work-related purposes.

### **R715-5 Criteria for Designation of Institutional Residences**

5.1 The Board, in designating an official institutional residence, shall consider:

5.1.1 Institutional mission

5.1.2 Living standards and cost of housing in the community

5.1.3 Ability to meet the president's needs for campus-related activities

5.1.4 Accessibility to the campus

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<sup>1</sup> Adopted April 22, 1975; amended June 28, 1979, April 20, 1982, May 15, 1984, and July 17, 1984, replaced February 26, 1988, amended March 25, 1988, August 19, 2005, July 17, 2009, March 29, 2013 and January 24, 2014.

5.1.5 Suitability for family needs

5.1.6 Estimated cost or market value

5.1.7 Previous designated institutional residences

5.1.8 Other appropriate factors

5.2 The institution, in consultation with the president, the chair of the institutional board of trustees, and the Chair of the Board of Higher Education, shall prepare a report addressing the adequacy and appropriateness of a facility requested to be an institutional residence, with special attention given to the criteria listed in 5.1. The institution shall submit the report to the Commissioner for review prior to submitting it to the board of trustees and the Board of Higher Education for approval. If approved, the Office of the Commissioner will retain report for future reference.

**R715-6 Initial Construction, Purchase, and Capital Enhancement:** Except as authorized in section 6.1 below, the costs of initial construction, purchase, capital enhancement, major remodeling, landscaping, and improvements of existing and future institutional residences must have the prior recommendation of the boards of trustees and approval of the Board of Higher Education. Such costs will be financed from sources other than state-appropriated funds unless otherwise specifically authorized by the Board.

6.1 The Board delegates authority to the institutional Boards of Trustees to approve and oversee the capital enhancement of existing institutional residences when the following specific conditions are met:

6.1.1 The total cost of the capital enhancement project does not exceed \$200,000 for the duration of the president's term in office.

6.1.2 No state-appropriated funds are used in the capital enhancements.

6.1.3 The capital enhancement furthers the purpose of the residence as a campus resource and as a home that satisfies the familial needs of the president.

6.2 Institutions engaging in capital enhancement of institutional residences using this delegated authority are required to report, at the next regularly scheduled meeting of the Board, the amount of the bid accepted and a summary of the work to be performed.

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**R715-7 Disposal of a Current Institutional Residence:** If an institution determines that an institutional residence is no longer adequate or suitable to meet the needs of the institution, the institution shall request authorization from the Board to dispose of the residence.

7.1 In requesting Board authorization, the institution shall describe why the residence no longer meets institutional needs, indicate the property (if any) that will replace the current institutional residence, commission and submit a property appraisal determining fair market value of the property, and receive approval of the board of trustees.

7.2 After Board approval, unless otherwise justified, the institution shall sell the property at or above fair market value. Revenue from the sale of the institutional residence shall be applied as designated and approved by the Board.

**R715-8 Conversion of a Current Institutional Residence:** If an institution determines that an institutional residence is no longer adequate or suitable to meet the needs of the institution, the institution shall request authorization from the Board to convert the residence to other uses.

8.1 In requesting Board authorization, the institution shall describe why the residence no longer meets institutional needs, indicate the property (if any) that will replace the current institutional residence, and receive approval of the board of trustees.

**R715-9 Costs of Maintaining Institutional Residences:** Maintenance costs, including utilities, routine care of the residence and grounds, equipment replacement, repairs, and improvements, will be borne by the institution.

9.1 Utility costs covered by this policy include fuel, power, water, sewer, garbage, internet service, cable or satellite television, basic telephone service, and long-distance telephone service for institutional purposes.

9.2 Domestic assistance serving institutional purposes may be provided as appropriate, and as set forth and approved in the budget in R715-10.

9.3 With the approval of the board of trustees, furnishings and equipment of a type serving primarily institutionally-related functions of the residence may be provided by the institution and shall remain on the property inventory of the institution.

9.4 Fire and liability insurance shall be carried on all institutional residences and property, with the costs being borne by the institutions. Insurance costs on personal belongings shall be paid for by the occupying president.

**R715-10 Budget Report to the Board:** On or before September 15 of each year, the president of each institution shall submit to the Office of the Commissioner a report summarizing the current fiscal year budgeted expenditures approved by the boards of trustees for the institutional residences. This report

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~~shall~~ detail budgeted expenditures for maintenance costs, custodial and domestic assistance, and insurance, as provided in ~~R715-9~~. This report ~~is~~ to be submitted to the Commissioner and to be shared with the Board, as an information item ~~with~~ the previous year's actual expenditures ~~and~~ the ~~approved~~ budget for that year.

~~R715-11~~ **Exceptions to Policy:** The provisions of this policy shall not apply to the Commissioner of Higher Education.

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