



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

TAB C

November 18, 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 that 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 to R715, *Institutional Residences*.

Attachments

~~R207~~R715, Institutional Residences ~~for Colleges and Universities in the Utah System of Higher Education~~¹

~~R715-207-1. Purpose:~~ To govern the designation, acquisition, operation, and disposal of an institutional residence for degree-granting institutions.~~provide for a designated institutional residence for each college and university, on or near the respective campuses, appropriate for the functions of the presidential office and the residential requirements of the presidents. The duties of a president require residence on or near the campus so as to permit personal hosting of activities and events and involvement in administrative problems requiring personal and immediate attention. Provision and maintenance of institutional residences serves the best interests of the institutions, protects the assets of the Utah System of Higher Education, and reflects generally accepted practice throughout American higher education.~~

~~R-715-207-2. References~~

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

~~2.2~~ Board Policy and Procedures-R205, Presidential Appointment, ~~Term of Office, and Compensation,~~ and Benefits

~~R715-207-3. Institutional Residences in the System of Higher Education: Policy~~ 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.

~~R715-43-1. Functions of an Official Institutional Residence:~~ The Board ~~may of Higher Education shall~~ designate an official institutional residence for ~~each college and university~~ 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 ~~is used by the President as an important extension of the campus in performing the functions of the presidential office. It will may~~ be the President's official residence and shall be used substantially for both administrative and social work-related purposes, ~~both administrative and social. The institutional residence serves as a vital~~

¹ 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. Adopted XXX; amended XXX Revised and renamed to R715 November 19, 2021.

center of social activity important to institutional advancement, where receptions for faculty, staff, students, and guests are held, and where influential visitors, lecturers, performers, potential donors, and others may be hosted.

R715-53-2: Criteria for Designation of Institutional Residences

~~53-2.1.~~ The Board of Higher Education, in designating an official institutional residence, shall consider:

~~take into account the~~

5.1.1. Institutional mission

~~type of institution (research university, baccalaureate/masters degree granting institution, or community college),~~

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

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. and Other appropriate factors:

~~53-2.2.~~ 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 summarizing the facts as to 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 residence on these points shall be prepared by the Commissioner in consultation with the President, the Chair of the institutional Board of Trustees, and the Chair of the Board of Higher Education. The institution shall submit the report shall will be submitted to the Commissioner for review prior to submission submitting it to both the institutional Board of Trustees and the Board of Higher Education for approval. If approved, the Office of the Commissioner will retain report will be filed in the Office of the Commissioner as evidence of official designation for future reference.

R715-63-3: Initial Construction, Purchase, and Capital Enhancement: Except as authorized in section ~~63-3.1~~ below, the costs of initial construction, purchase, ~~and~~ capital enhancement, major remodeling, landscaping, and improvements of existing and future institutional residences must have the

prior recommendation of the ~~institutional b~~Boards of ~~t~~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 ~~of Higher Education~~.

~~63-3.1~~ The Board ~~members~~ 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:

~~63-3.1.1.~~ The total cost of the capital enhancement project does not exceed \$200,000 for the duration of the president's term in office.

~~The project remains subject to other applicable state approval processes.~~

~~63-3.1.2.~~ No state-appropriated funds ~~are~~may be used in the capital enhancements.

~~63-3.1.3.~~ The Ccapital enhancement ~~of institutional residences should enhance~~ further the purpose of the residence as a campus resource and as a home that satisfies~~well as meet~~ the familial needs of the president.

~~6.23-3.1.4.~~ 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 ~~of Higher Education~~, the amount of the bid accepted and a summary of the work to be performed.

~~R715-73-4.~~ **Disposal**Selling of a Current Institutional Residence: ~~Should the Board members~~ 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. ~~appropriate appraisals may be obtained, sufficient advertising and bid time allowed, and the residence sold. Revenue from the sale will be applied as designated and approved by the Board of Higher Education.~~

~~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 ~~institutional bo~~Board of ~~t~~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 ~~institutional~~ Board of Trustees.

[R715-93-5](#). 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](#). ~~U~~The 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.

[93-5.2](#). Domestic assistance serving institutional purposes may be provided as appropriate, and as set forth and approved in the budget in [R715-103-6](#).

[93-5.3](#). With the approval of the ~~institutional~~ 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.

[93-5.4](#). 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 presidents.

[R715-103-6](#). Budget Report to the Board of Higher Education: On or before September 15 of each year, the ~~p~~President of each institution shall submit to the Office of the Commissioner of Higher Education a report summarizing the current fiscal year budgeted expenditures approved by the ~~institutional~~ Boards of Trustees for the institutional residences. This report shall detailing budgeted expenditures for maintenance costs, custodial and domestic assistance, and insurance, as provided in [R715-93-5](#). This report is to be submitted to the Commissioner and to be shared with the Board of Higher Education as an information item with ~~will also include~~ the previous year's actual expenditures and ~~long~~ with the approved budget ~~approved~~ for that year.

[R715-113-7](#). Exceptions to Policy: The provisions of this policy shall not apply to the Commissioner of Higher Education. ~~The Board of Higher Education may provide an equitable housing allowance, or make other equitable and appropriate arrangements, to accommodate the residential housing requirements of the Commissioner or institutional Presidents.~~

R715, Institutional Residences¹

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 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

¹ 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. Revised and renamed to R715 November 19, 2021.

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.

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

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.