



**Utah Board of Higher Education
Utah Tech University
Friday, September 16, 2022**

7:30 AM – 8:50 AM	Board of Trustees Report and Closed Session <u>Location: Wittwer Conference Room (Room 550), Holland Centennial Commons</u>	
	<ul style="list-style-type: none"> • Richard Williams, President • Tiffany Wilson, Board of Trustees Chair 	
	Closed Session	
8:50 AM – 9:00 AM	Break	
9:00 AM	Committee of the Whole <u>Location: Zions Bank Room (Room 537), Holland Centennial Commons</u>	
9:00 AM – 9:05 AM 9:05 AM – 9:10 AM	Welcome – Chair Church New Board Member Oath of Office – Brynn Fronk <ul style="list-style-type: none"> • Grace Acosta • Hope Eccles • Xitlalli Villanueva • Rick Wheeler 	
9:10 AM – 9:20 AM	Student Report <ul style="list-style-type: none"> • Tyson Ayoso, Dixie Technical College • Chayse Daugherty, Utah Tech University 	
9:20 AM – 10:00 AM	Committee Discussion	TAB A
10:00 AM – 12:00 PM	Information Items:	
10:00 AM – 10:10 AM	Data Training – Carrie Mayne	
10:10 AM – 10:15 AM	Building Prioritization Review – Chair Church & Arthur Newell	
10:15 AM – 10:30 AM	State Board of Higher Education Building Update – Commissioner & Juliette Tennert	TAB C
10:30 AM – 10:35 AM 10:35 AM – 10:40 AM	Community College Study Update – Commissioner Overview of Fall R&R Visits – Alison Adams-Perlac	
10:40 AM – 10:50 AM	Break	
10:50 AM – 11:10 AM	Statewide Online Education Initiative – Brad Mortensen	TAB D
11:10 AM – 11:20 AM	Hispanic-Serving Institutions Discussion – Brad Mortensen	TAB E
11:20 AM – 11:35 AM	Council of Presidents – Paul Hacking & Richard Williams	
11:35 AM – 11:45 AM	Campus Safety & Equity Advisory Council Update – Xitlalli Villanueva	TAB F
11:45 AM – 12:00 PM	OnBoard Training – Brynn Fronk & Andrew Sompels	
12:00 PM – 1:30 PM	Lunch (Board Photos & IT Assistance) <u>Location: 4th Floor, Holland Centennial Commons</u>	
1:30 PM – 3:10 PM	Action Items:	
1:30 PM – 2:00 PM	Strategic Plan Updates – Commissioner & Taylor Adams	TAB G
2:00 PM – 2:20 PM	USHE FY2023-24 Operating Budget Request – Juliette Tennert	TAB H

2:20 PM – 2:25 PM	Utah State University Acquisition of Property by Exchange – Juliette Tennert	TAB I
2:25 PM – 2:30 PM	University of Utah Series 2022C Revenue Bonds – Juliette Tennert	TAB J
2:30 PM – 2:35 PM	Technical Education Tuition Related Policy Revisions – Juliette Tennert	TAB K
2:35 PM – 3:05 PM	Huron Study & Shared Services – Commissioner & Juliette Tennert	TAB L
3:05 PM – 3:10 PM	Consent Calendar – Chair Church	TAB M

Projected times for the various meetings are estimates only. The Board Chair retains the right to take action at any time. To ensure availability, individuals needing accommodations under the Americans with Disabilities Act (including auxiliary communicative aids and services) for this meeting or the materials should notify Brynn Fronk at brynn.fronk@ushe.edu, 60 South 400 West, Salt Lake City, UT 84180 (801-646-4783), at least three working days prior to the meeting.



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

TAB A

September 16, 2022

Academic Education Committee Report

The Academic Education Committee met on August 19, 2022, under the leadership of Committee Chair Stan Albrecht, with all committee members participating. The meeting was dedicated to an overview of the committee's strategic plan responsibilities, with a special focus on the responsibility to provide oversight for institutional roles and missions and the types of programs and awards that institutions may offer. The committee will meet again on September 15 to continue the discussion on institutional roles and missions, which will be a focus at other future meetings as well.

The committee voted to forward updates to some of the strategic plan tactics to the full board for discussion and approval during the September 2022 meeting. Specific changes to the strategic plan can be found under separate cover; see Tab G.

The Committee's key responsibilities on the strategic plan:

- Improve completion and transfer by aligning degree program structure and addressing barriers to transfer. Key tactics include:
 - Appointing a system Transfer Council to examine barriers to transfer that may impede students' degree completion. The council has recommended crucial areas where the system should address transfer principles, which the Board subsequently approved. The council's work is ongoing.
 - Convening faculty major committees to design and implement shared lower division requirements within majors across institutions. These lower division agreements are in place or in progress for the majors that comprise 80% of completions across the system.
 - Coordinating shared general education requirements through system policy and the General Education Task Force.
 - Communicating transfer options to students, including through the electronic Utah Transfer Guide.

- Standardizing credit for prior learning and ensuring that the credit aids in completion and is transferable. Key tactics include:

- Standardizing the credits students earn in subject tests offered by national providers such as CLEP, AP, the military DSST exams, and high school IB tests by establishing the minimum scores required and the number of equivalent credits that will be transcribed for commonly numbered courses based on those scores.
- Appointing a system Prior Learning Committee of institutional representatives with responsibility for implementing new policy requirements for credit for prior learning at the degree-granting institutions, including updating institutional policies, communicating options to students, and training faculty and staff.
- Using mandatory annual institutional reports on credit awarded through various types of prior learning assessments to evaluate the impact of credit for prior learning on student completion.
- Expanding supportive entry-level education practices. Since the biggest determining factor for whether students complete a degree is the number of courses they have failed, this strategy is aimed at improving pass rates in key “gateway” courses—the highest enrolling courses, serving the largest number of students, and also serving as critical pre-requisites for subsequent coursework. Key tactics include:
 - Developing standards for placement into college-level courses and adopting multiple measures for placement rather than only relying on a single standardized exam like the ACT to avoid inappropriately placing students in remedial education.
 - Designing strong co-requisite remediation to help students who are underprepared for college coursework enroll in and be successful in college-level courses.
 - Expanding options for fulfilling the quantitative literacy graduation requirement to better align with students’ major and career pathways and improve their odds of meeting the requirement. For example, several institutions identified calculus routes for science majors, but are shifting to statistics in the social sciences and quantitative reasoning in the arts.
 - Examining and disaggregating the data on gateway course success to identify which groups of students are not succeeding in those courses. Working through the General Education Task Force and faculty area working groups, helping faculty collaborate across the system to improve those course pass rates by exploring options for in-class supports, expanded tutoring, more inclusive pedagogy, etc.
 - Ensuring that these academic tactics also apply to Concurrent Enrollment courses.
- Providing strategic oversight for institutional roles and missions and program offerings to fully incorporate all institutions within a single system. Tactics include:
 - Revising policies governing institutional roles and award types, for all USHE institutions.
 - Updating policies on faculty workload by institutional role for degree-granting institutions.
 - Aligning academic programs with institutional roles and minimizing unnecessary duplication among institutions.

- Updating the academic program approval process and linking it with electronic data management to also improve the cyclical review process.
- Strengthening the cyclical program review process to ensure academic quality.

Priorities that the committee still needs to develop:

- Defining the purpose and goals of the new system-wide participation in two related national partnerships: the American Association of Colleges and University’s Civic Evidence Project and the Civic Learning and Democracy Engagement project. Both efforts will highlight the important civic role of USHE institutions and their impact on their local communities and the state.
- Defining the various research responsibilities of the degree-granting institutions by institutional role and setting board goals related to the research activities of those institutions.

Recommendations

This is information only; no action required.



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

TAB A

September 16, 2022

Technical Education Committee Report

During its meeting on August 19, 2022, the Technical Education Committee held discussions on the following topics:

Strategic Plan Updates

Associate Commissioner Ziebarth provided updates on the strategic plan priorities assigned to the committee. This update included some wording changes and reassigning strategies to different priorities to better reflect the work that is being done. The committee approved the proposed changes and recommended they be forwarded to the full board for approval at the September 2022 meeting. Specific changes to the strategic plan wording can be found under separate cover; see TAB G.

Credit Transition Update

Associate Commissioner Ziebarth provided updates on the credit transition initiative. The credit initiative designates that technical education institutions transition from clock-hours to semester credits. This initiative is intended to align the credit currency between all 16 higher education institutions. The goal is to improve transfer opportunities and address challenges imposed on clock-hour institutions by the U.S. Department of Education. These challenges impact the ability to offer instruction in a hybrid or distance education format and negatively impacts financial aid-eligible students who progress quickly in their coursework.

Application Status

The Council on Occupational Education (COE) accredits Utah's technical colleges. COE has an application process and grants approval for an institution to transition from clock-hours to semester credits.

- Applications to COE for Southwest, Davis, and Dixie have been processed and these institutions can begin implementation as soon as tuition policies are finalized.
- Mountainland Technical College: The Commissioner's office has applications and will submit them as soon as the Mountainland Technical College leadership is ready.
- Tooele and Bridgerland Technical College: The Commissioner's office has applications for Tooele Technical College. Bridgerland has not submitted applications. Both institutions have accreditation reaffirmation visits this fall and are currently in a moratorium period that prohibits

any institutional or programmatic changes. Applications will be submitted as soon as the moratorium period is lifted. Institutions can begin implementation when approval is granted.

- Uintah Basin and Ogden-Weber Technical College: While the Commissioner's office has applications for the institutions, both have reaffirmation visits in February and next fall, with moratorium periods beginning in September and March respectively. Applications will be submitted as soon as the moratorium period is lifted.

Implementation will begin with changes to institutional policy and procedures, including tuition and fees, which we expect to be presented to the Board in November. Implementation will take place one program at a time with the enrollment of new students in the credit-bearing program, and a two-year teach-out period for clock-hour programs.

The Commissioner's office has met with SLCC's leadership team several times, and they are developing an implementation plan to begin the transition to credit in their technical college on July 1, 2023. Technical education offered at Snow College and Utah State University is already offered in semester credits.

The implementation of defined-exit scheduling, which is required for the transition to credit, is complete at the technical education institutions.

Everything needed in the Student Information System for curriculum, scheduling, tuition, and sign-offs required for the credit transition is complete. Some additional changes will be made to reporting, but the functionality and interface are finished. The Northstar team was recognized for their responsiveness and good work on this effort.

To support the technical education institutions in their implementation of credit and to ensure those responsible for this work receive complete and consistent information, the Commissioner's office developed a Credit Implementation Guide. This centralized resource provides extensive guidance in every aspect of implementation. Institutions were encouraged to contribute to the continued improvement of this resource by submitting unanswered questions and providing information learned during the implementation process.

Institutions were asked to submit adjustments to standard tuition rates with consideration for changes to differential tuition and course fees. Associate Commissioner Ziebarth recognized Russ Galt as a strong leader with extensive experience in technical education finance. He has led the effort to change tuition practices to meet the needs of the transition to credit, which are summarized in the next section.

Credit-Related Tuition Policy Changes

Russ Galt, the Senior Assistant Commissioner for Technical Education Finance, discussed tuition and fee policy changes needed for the transition to credit. Tuition policies were originally written for degree-

granting institutions. The following actions were proposed to ensure policy alignment between technical colleges and degree-granting institutions, and to prepare for technical colleges to offer courses based on credit hours in accordance with the Board of Higher Education's strategic objective of system unification.

Below is a summary of the proposed policy changes recommended to the committee:

- R510, Tuition: Addresses tuition at technical colleges. Incorporates policy provisions from tech policy 204 related to the statutory requirement for no tuition for secondary students and low-cost tuition for post-secondary students.
- R511, Tuition Disclosures and Consultation: Provides tuition disclosures for short enrollment periods of less than a semester as are found in technical education. Provides that general student fees should not be charged to students at technical colleges.
- R512, Determination of Resident Status: Extends the provision that technical colleges are not required to determine residency status to credit-based courses at technical colleges.
- R514, Refunds of Tuition, Fees, and Other Student Charges: Addresses refunds for short enrollment periods found in technical education.
- R516, General Student Fees: Provides that general student fees should not be charged to students at technical colleges.
- R517, Course and Program Fees: Eliminates policy exceptions for technical colleges. With this revision, the policy provisions related to the course and program fees will be fully applicable to technical colleges. The policy clause stating that course fees shall not be used to pay instructional services rendered by faculty and staff will apply to technical colleges as well as degree-granting institutions. Additionally, a provision that was formerly found in tech policy 204, has been added to R517. This provision allows technical colleges to waive fees for secondary students who qualify for fee waivers at the high school. Tech policy 204 will be rescinded.

In upcoming Board meetings, technical colleges will bring forward proposals for credit-based tuition as they begin to offer courses based on credit hours. These policies will be reviewed by the Finance and Facilities Committee as they are related to tuition. This item was brought to the Technical Education Committee as information only at this time.

Program Alignment Proposals and Progress

Will Pierce, the Assistant Commissioner for Technical Education, provided a progress report on the program alignment initiative. The Board directed the technical colleges to align programs and asked the Commissioner's office to facilitate faculty committees from each discipline to design aligned program guides. The Board directive for the use of guides includes the use of a single program name, length, description, and set of objectives.

Each program guide should also delineate aligned courses that comprise at least 70% of the total program length/credits with the alignment of course names, lengths/credits, descriptions, and objectives. It is

intended that up to 30% of the total program hours be reserved for institutions to provide for region-specific education and training needs.

The review process includes a few other committees including a group of instructional designers from the technical education institutions, the instructional officer's committee, and a USHE curriculum committee to evaluate the proposed guides submitted by the faculty. At each stage in the review and evaluation process, any recommendations or suggestions are sent back to the faculty groups to consider or continue their work in developing these aligned program guides. After the proposed guides have been reviewed by these committees, they are presented to the Technical Education Committee for review and agreement that the proposals meet the intent of the initiative.

The committee reviewed alignment proposals for programs offered by single institutions and those offered by multiple institutions, which are created by program committees made up of a faculty representative from each institution that offers the program. The committee agreed on the proposals for Esthetician, Injection Molding, Manufacturing Technology, Digital Marketing and Analytics, Limited X-Ray Technician, Radiography Technology, Sterile Processing Technician, Clinical Lab Assistant, Medical Office Administration, Advanced Emergency Medical Technician, Electrical Apprenticeship, Emergency Medical Technician, Nursing Assistant, Plumbing Apprenticeship, and Real Estate meet the intent of the initiative and requested they be forwarded to the Board.

The committee had an extensive discussion regarding the Truck Driver, Heavy, Introduction to Pumping, Tower Technician, Advanced Energy Transportation, Firefighter, and Fire and Rescue Services proposals. The committee asked to hold off on the designated alignment of these programs and requested a more in-depth discussion regarding what constitutes a program versus short-term training, the integrity of credentials, control of curriculum, and investment of institutional resources. The committee asked for the discussion to include consideration for: 1) the length and credits of regulated and non-regulated programs, 2) whether instruction should be offered as a program or through short-term training, 3) whether this designation should reflect broad industries or the needs of a specific employer, and 4) addressing training in which an institution does not have full control of content or contribution of institutional resources. The committee agreed there is no intent to discourage training to meet industry demand but to appropriately classify educational activities.

Associate Commissioner Ziebarth and Assistant Commissioner Pierce will meet with the instructional officers for further discussion and bring this topic back to the next committee meeting.

Corrections Plans

The Corrections Council was formed in response to House Bill 226 (2022). The duties of the council are to advise the Board of Higher Education, Department of Corrections, Education Interim Committee, and Higher Education Appropriations Subcommittee. The goal is for integration and productive employment of inmates upon release. The council intends to meet this goal by focusing on the following areas:

evidence-based practices, accessibility during incarceration, timely completion of courses, certificates, degrees, accessibility, sustainable occupations aligned with workforce demands, cross-institutional coursework, personal and civic development, innovative course delivery, including technology, and data: enrollment, completion, financial aid, costs, recidivism, employment, and continued education.

The council's first meeting was on July 27. During this meeting, the council reviewed current programs and available data, the transition to the new corrections facility, and identified current issues. The council also met on August 24 where they developed a vision and work plan as well as assigned work groups. At their October meeting, the council plans to review evidence-based practices research and consider work group recommendations and priorities. In November, the council plans to identify gaps and recommend long-range strategic priorities and short-term 2023 priorities. The council will report to the Board of Higher Education, Education Interim Committee, and Higher Education Appropriations Subcommittee.

Workforce Alignment

Talent Ready Utah Director, Vic Hockett, gave the committee an update on the Utah Works Program. The goal of the Utah Works Program is to develop workforce solutions with industry and train individuals looking to skill up quickly for improved employment opportunities.

Proposals are submitted to Talent Ready Utah on an ongoing basis, that are scored and validated by a committee, which makes recommendations to the Talent Board to determine funding. Proposals must show an immediate regional employment need and strong partnerships between the institution and industry with a direct link to employment for program completers through these partnerships. Program lengths are short and can be a portion of a full certificate or newly developed training.

There is \$4,850,500 of funding available. The goal of funding use is to have programs aligned with industry needs and get participants placed, and for students to receive training without incurring costs. The use of funding is fairly flexible and can be used for curriculum development, marketing, outreach, procurement of equipment and supplies, and covering the cost of instruction. The institutions can ask to cover FTE or tuition costs for students, but not both.

Recommendations

This is information only; no action is required.



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

TAB A

September 16, 2022

Student Affairs Committee Report

The following is a summary of the Student Affairs Committee meeting on August 19, 2022:

Strategic Plan Updates ([TAB A](#))

Chair Scott Theurer reviewed the Student Affairs Committee's priorities within the Board's five-year strategic plan. The committee approved the slight updates made to the tactics within the plan and forwarded the updated strategies to the Committee of the Whole for consideration.

EQUITY

Equity Resolution Highlights: [HB144 Standardization and Expect the Great \(TAB B\)](#)

After adopting the Board's [Resolution to Advance Equitable Systemic Change](#), the Board approved a series of additional resolutions aimed at closing postsecondary attainment gaps by race, ethnicity, gender and sexual orientation, citizenship status, and socioeconomic status. Since 2020, the Board has championed three resolutions to affirm and support [Undocumented, DACAmented, Dreamer students](#); [African, African American, Black students](#); and most recently, [LGBTQ+ students](#). All resolutions come with action items and charges for the system office and its 16 institutions that align with the Board's five-year strategic plan. The committee heard progress on implementing the Board's equity resolutions from:

- Laís Martinez, Assistant Commissioner for Equity, Diversity, and Inclusion at USHE, discussed institutional commitment to Native/Indigenous students (more to come at the October Student Affairs Committee meeting).
- Andy Young, Director of Admissions Operations at Weber State University, spoke on the impact of simplifying and standardizing [HB-144](#).
- Raquel Cetz, Interim Dream Center Director at the University of Utah, discussed the urgent need for action to support undocumented students due to the [possible rescinding of DACA](#).
- Daneka Souberbielle, Associate Provost and Chief Diversity Officer for Southern Utah University, shared the [newly-created Expect the Great Charter](#).

Hispanic-Serving Institutions (HSI) ([TAB C](#))

Weber State University President Mortensen [presented on the definition and role of HSIs and Weber's journey to becoming a Hispanic-Serving Institution](#). As multiple USHE institutions are considering HSI

designation, Board Chair Lisa Michele Church recommended the committee forward this item to the Committee of the Whole for further discussion on system impacts.

ACCESS

Simplified Admissions Taskforce Update (TAB D)

Beginning in April 2022, the Commissioner's office formed the systemwide Simplified Admission Taskforce to address issues facing students accessing higher education within the state. After recent conversations with state- and system-level stakeholders, including the Governor's office, USHE institutional presidents, and members of the Utah Board of Higher Education regarding simplifying admissions, it has been determined that the timeline for the taskforce needs to be expedited. The taskforce objectives should be made more explicit and aligned with the feedback from these stakeholders. Updated taskforce objectives are as follows:

1. Recommendation to consider a common process for in-state undergraduate students applying to public colleges and universities in Utah to be implemented by Fall 2024.
2. Recommendations around specific details of the common process that may or may not include:
 - a. Direct admissions in conjunction with a common process.
 - b. State scholarship application integration.
3. Recommendation regarding application fees informed by an institutional survey of application fees.
4. Recommendation on the sharing of K-12 student directory information.

Recommendations from the Simplified Admissions Taskforce will be presented at the December 16, 2022, Student Affairs Committee meeting for discussion and consideration.

Utah College Advising Corps (UCAC): Review of 2021-22 Expansion (TAB E)

Assistant Commissioner for Access Richard Gonzalez and Director of the Utah College Advising Corps Rachel Everitt presented on the impact, successes, and challenges of the initial expansion of the UCAC program.

Key Performance Indicators (KPI)

During the 2021-22 school year, the UCAC program reached 20,505 Utah high school seniors, representing 41% of the Utah high school senior class. The actual KPI results for the 2021-22 UCAC expansion are below, as a percentage of the 2022 UCAC graduating class:

1. One-to-one meetings with high school seniors: 73% (14,969 students)
2. Students submitting at least one college application with the support of an adviser: 70% (14,353 students/college applications)
3. Meaningful engagement with the family of a student: 26% (5,332 families of high school seniors)
4. Assistance in filling out the FAFSA: 25%* (at least 5,126 students)
5. FAFSA completion rate: 37% (7,587 FAFSAs completed)

**Data collection was inconsistent for the FAFSA assistance KPI, resulting in an inaccurate count. This has been addressed for the 2022-23 school year.*

Successes

- Program growth and implementation of two pilot program models
- Advising quality and reach
- FAFSA completion

Challenges

- Adviser recruitment and COVID-19

Looking Forward: 2022-23 UCAC Expansion (Phase II) Opportunities and Areas of Focus

- Purposeful integration of technical colleges
- Program growth and further implementation of pilot program models
- Adviser recruitment
- FAFSA completion

COMPLETION

Student Wellness Continuum

Alexis Palmer, Associate Vice President of Student Development/Dean of Students at Utah Valley University, [presented on how the continuum of student well-being](#) is holistic and includes everything from physical safety to food security to mental and physical health. The continuum itself for any of these issues includes early intervention, referral to care, treatment, and maintenance. The committee expressed appreciation and agreement with looking at student well-being as a continuum and how inextricably connected student well-being is to student success.

Systemwide Basic Needs Landscape Analysis (TAB G)

Katie Mazzie, Director of Student-Centered Initiatives at USHE, presented the draft of a systemwide basic needs landscape analysis she conducted to better understand basic needs supports across the system. Key findings include:

- Seven institutions employ at least one basic needs coordinator, case manager, or other dedicated position to help students in need connect with on-campus and external basic needs resources.
- Fourteen institutions offer an on-campus program to address food insecurity in the form of a food pantry (13), a food voucher/gift card program (9), or both (8).
- Nine institutions utilize emergency temporary housing, emergency hotel vouchers, partnerships with local homeless shelters, referrals to community partners, or a combination of strategies.
- Eleven USHE institutions award emergency grants to institutions facing unforeseen economic hardship, ranging from \$400 to \$5,000, with a median of \$1,000.

Systemwide Student Wellness Case Managers (TAB H)

The co-chairs of the Senior Student Affairs Officers (SSAOs)—Brett Perozzi, Vice President of Student Affairs at Weber State University, and James Mullenau, Vice President of Student Services at Southwest Technical College—presented a legislative budget proposal for eleven student wellness case managers to be housed at institutions and shared regionally, as appropriate. These positions will be responsible for conducting outreach and case management to help students secure the campus-based, community-based, state, and federal resources they need to achieve wellness and succeed in their education. The committee approved this request and forwarded it to the Committee of the Whole for consideration in its formal legislative budget request for the 2023 legislative session.

Systemwide Student Wellness Case Managers (TAB I)

The co-chairs of the Senior Student Affairs Officers (SSAOs)—Brett Perozzi, Vice President of Student Affairs at Weber State University, and James Mullenau, Vice President of Student Services at Southwest Technical College—also presented a legislative budget proposal to support student mental health. The committee approved this request and forwarded it to the Committee of the Whole for consideration in its formal legislative budget request for the 2023 legislative session, with the caveat that more details need to be presented at that time for them to support and adopt this request.



UTAH SYSTEM OF
HIGHER EDUCATION

TAB C

Utah Board of Higher Education Building Update



Richard V. Lainez
Building Manager
Civil Engineer, FMP

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Section 1. Introduction

1.1 Purpose and Scope

The purpose of this white paper is to provide Utah Board of Higher Education members and key decision-makers with a summary of the Board Building, including current and future capabilities. This document summarizes information from a variety of sources. This paper shows where we are today and where we are planning to go.

Section 2. Building Overview

2.1 Introduction

This section presents a summary profile of the Board Building and its environs. It also describes the organizations housed in the building.

2.2 Vicinity Profile

2.2.1 Geographic Location

As shown in Figures 2.01 and 2.02, the Board Building is located at 60 South 400 West as part of the 25-acre Gateway Complex, Block B, in downtown Salt Lake City, Utah. The building consists of 81,794 BOMA rentable square feet in a ten-story building constructed circa 2002 with a classic theme, including a stone base and articulated façade, which is reminiscent of early Salt Lake architecture. The building includes five levels of office suites and five levels of underground parking with 240 assigned stalls.

Fig. 2.01 Gateway Office Tower #2: The State Board Building

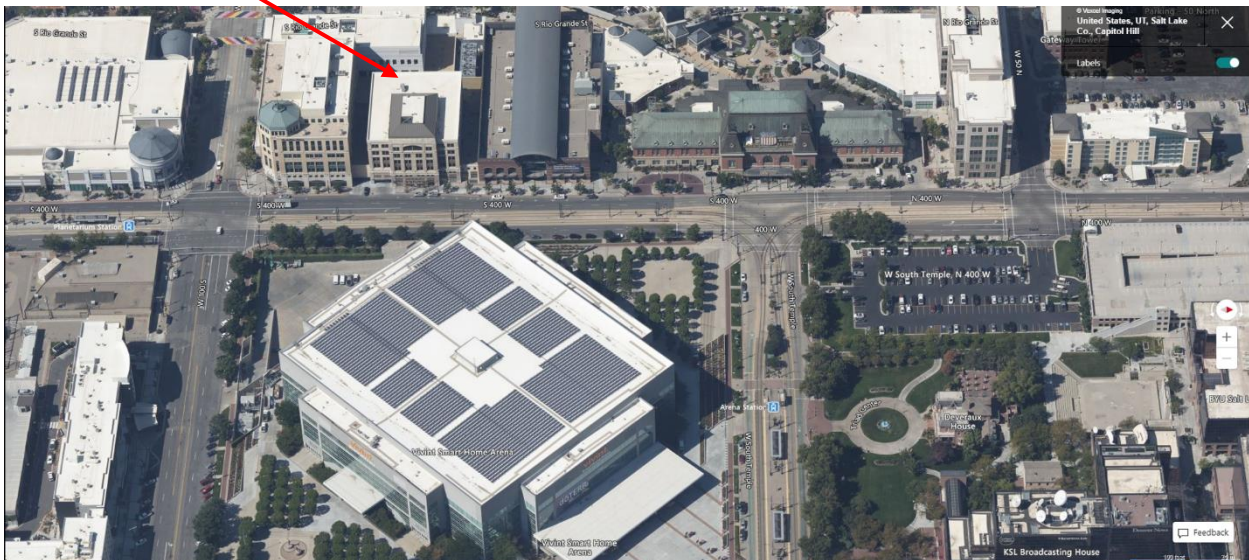


Fig. 2.02 Gateway Office Tower #2: The Gateway Complex



2.3 Building History & Description

2.3.1 Building History

Since the creation of the Board of Regents in 1969, the Regents sought a permanent home for their administrative functions, which included the Office of the Commissioner of Higher Education (OCHE), the Utah Higher Education Assistance Authority (UHEAA), and my529.

On October 18, 2001, the then commissioner of higher education, Cecilia H. Foxley, requested authorization from the Board of Regents to purchase the top three floors (3rd, 4th & 5th) of the building (Gateway Office 2), totaling 52,566 BOMA rentable square feet.

The actual purchase took place on December 20, 2001, for \$8,000,000 with Gateway Associates, LTD. The \$8,000,000 included a tenant-improvement allowance of \$2,142,171 with the condominium project builder, The Boyer Company, to complete the finish of the offices and provide 189 designated irrevocable “right to rent” parking stalls in the north garage.

The initial purchase agreement of the top three floors included the option to purchase the remaining floors. The remaining floors (29,228 BOMA rentable square feet), were purchased on June 03, 2004, for \$3,605,260 and included a tenant-improvement allowance of \$246,204.

The purchase of the building automatically made USHE a member of the Condominium Association and, as a member, there are several conditions and obligations to comply, such as common areas maintenance and water, sewer, and trash removal. Separate agreements were signed with Gateway Associates, LTD for central plant service, shared maintenance of the courtyard (patio) and parking licenses.

2.3.2 Building Appraisal

The building’s insurable value in Jan. 2022 was \$24,983,000.00. In 2022, UHEAA opened a fully funded trust to pay the remaining building bond debt by 2024.

CBIZ VALUATION GROUP, LLC

Building Summary Report

Utah System of Higher Education

	Year Built	ISO Class	# of Stories	Square Footage	Building Insurable Value	
Site Number: 001						
Site Name: Gateway Building Tower 2						
BUILDING # 9437	Gateway Building Tower 2 60 South 400 West Salt Lake City, UT 84101	2002	5	6	81,794	\$24,983,000
Totals for Gateway Building Tower 2 - 1 Appraisal					\$24,983,000	
Totals for 001 - 1 Appraisal					\$24,983,000	
Grand Totals - 1 Appraisal					\$24,983,000	

2.3.3 Building Condition Assessment & Reserve Fund

In Aug. 2019, a Facility Condition Assessment (FCA) was completed. The report provides a comprehensive assessment of the building conditions and an expenditure forecast of the yearly anticipated expenditures over a study period of 10 years (2019-2028). The anticipated expenditures over the study period are approximately \$5,390,236.

In Jan. 2022, OCHE took over the management and administration of the building reserve fund, operations, and maintenance expenditures. The reserve will be fully funded in FY2023. This will allow a reduction in reserve contribution by half or more.

The current building operating cost (utilities, maintenance, insurance, reserve, security, custodial service, supplies, property management, heating and cooling) for FY2023 is \$920,000 (rounded up to the nearest \$10K), \$12.90/sq. ft. The total parking cost for FY2023 is \$262,526 for 240 parking stalls, \$91.16/stall/month.

Currently, OCHE occupies a portion of the 5th floor, part of the 2nd floor, and part of P+3 (mezzanine floor). my529 occupies a portion of the 5th and most of the 2nd floor. UHEAA occupied two floors (3rd & 4th). After the downsizing, UHEAA occupies a small portion of the 4th floor, and the 3rd floor is vacant.

2.3.4 Property Analysis

In March 2022, Jones Lang LaSalle LP, Inc. (JLL) did a property analysis of lease vs. sale scenarios.

PROPERTY ANALYSIS GATEWAY TWO | 60 S 400 W

81,794 SF
Total Building RSF

5
Stories

17,780 SF
Typical Floor Size

240 stalls
Garage Parking

2001
Year Built

BUILDING HIGHLIGHTS

Well located in desirable office submarket

Mixed-use environment with onsite dining,
shopping and entertainment

Located on a Trax stop

Direct access to Gateway's tenant lounge

Fitness center and large conference facilities

9 Real Estate Advisory Services



PROPERTY ANALYSIS LEASE SCENARIO



STRENGTHS

- ▶ **DESIRABLE LOCATION WITH IMMEDIATE TRAX ACCESS**
- ▶ **ONSITE AMENITIES** (TENANT LOUNGE & FITNESS FACILITY)
- ▶ **COVERED, DIRECT ACCESS TO PARKING**
- ▶ **UNIQUE OFFERING TO MARKET**

CHALLENGES

- ▶ **LOW VELOCITY** post-covid, downtown SLC is recovering more slowly than suburban submarkets
- ▶ **ONSITE COMPETITION** significant vacancies at other Gateway properties

RECOMMENDATIONS

01
\$30/SF FULL SERVICE
Asking lease rate

02
Up to \$40/SF
(5 YEAR DEAL)
Tenant improvement allowance based on tenant credit and lease term. The property shows well and it's likely a tenant won't require the full allowance.

03
SIGNAGE
Consider offering building signage for multi-floor tenant

04
SHARED SPACES
Consider offering shared use of 1st floor conference facilities via sign up system
Consider offering Parking

PROPERTY ANALYSIS SALE SCENARIO



STRENGTHS

- ▶ **DEMAND** users are taking advantage of low interest rates to purchase
- ▶ **LITTLE COMPETITION** low inventory
- ▶ **SEPARATE PARCELS** allows flexibility in selling floor by floor

CHALLENGES

- ▶ **HOA** HOA would need to be created to cover building expenses & maintenance
- ▶ **INTEREST RATE UNCERTAINTY** rising rates could impact interest

RECOMMENDATIONS

01
\$350-375/SF
Asking price

02
AS-IS
No improvements needed for a sale

03
SIGNAGE
Consider monument or building eyebrow signage for multi-floor buyers

2.3.5 The Way Forward

The recommendation of the Building Planning Committee is to consolidate OCHE on the 5th floor, my529 on the 4th floor, UHEAA on the mezzanine floor (P+3) and lease the vacant floors (3rd and 2nd floors).

In May 2022, EDA Architectural Firm was hired to do the space planning to test fits for the consolidation of OCHE on the 5th floor and my529 on the 4th floor. In September 2022, EDA will start phase two design development and construction documents.

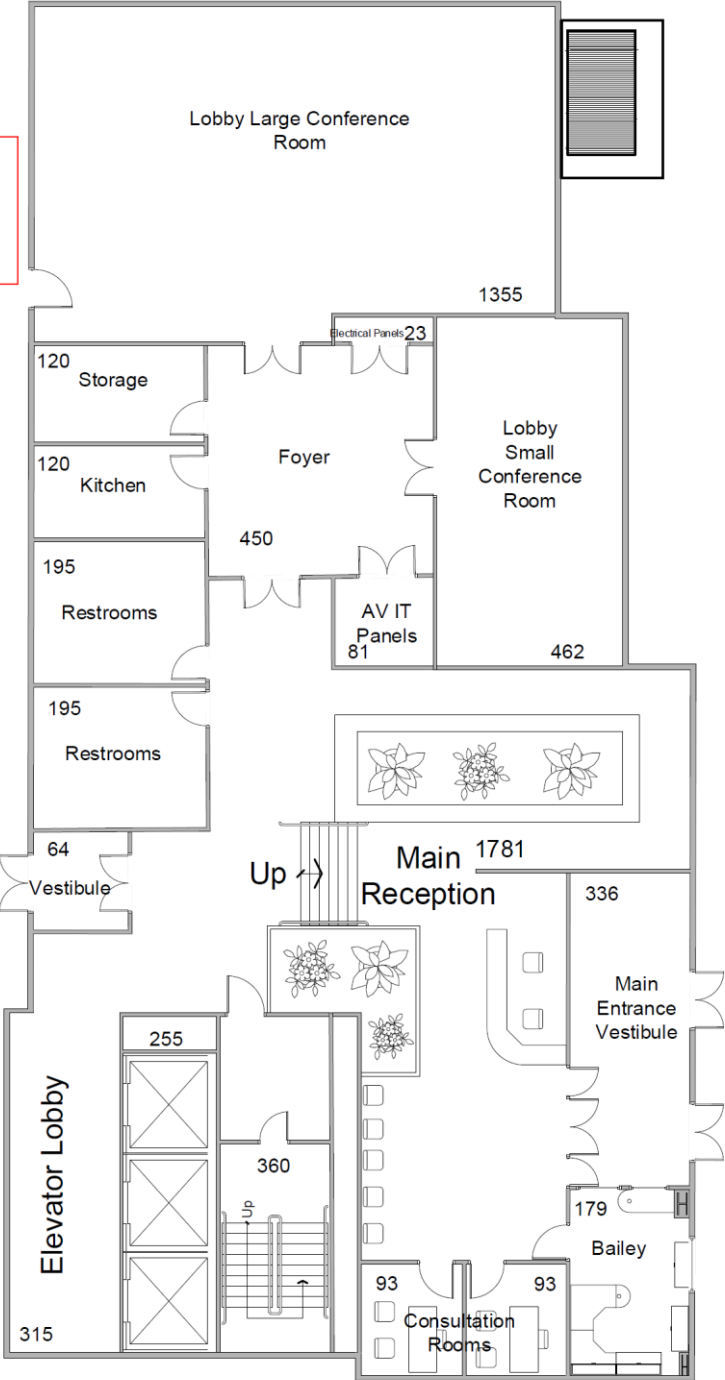
Once the construction documents are completed, the plan is to request cost proposals and present a financial statement to the Board for approval.

Section 3. Floor Plans

3.1 Lobby Level

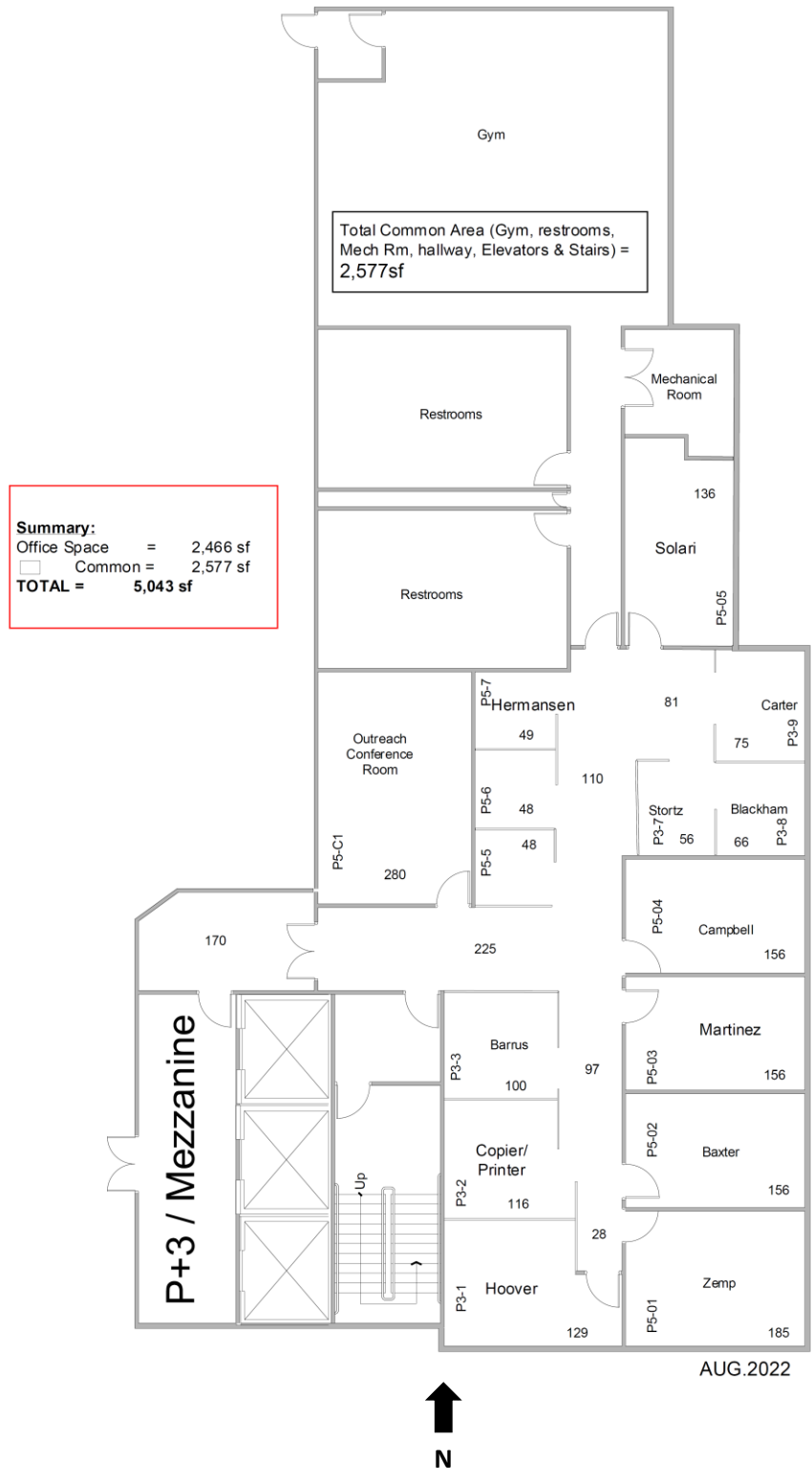
Summary:
TOTAL = 6,474 sf

COMMON
 2 Conference Rooms
 1 Offices
 1 Storage
 1 Kitchen
 2 Consultation Rooms

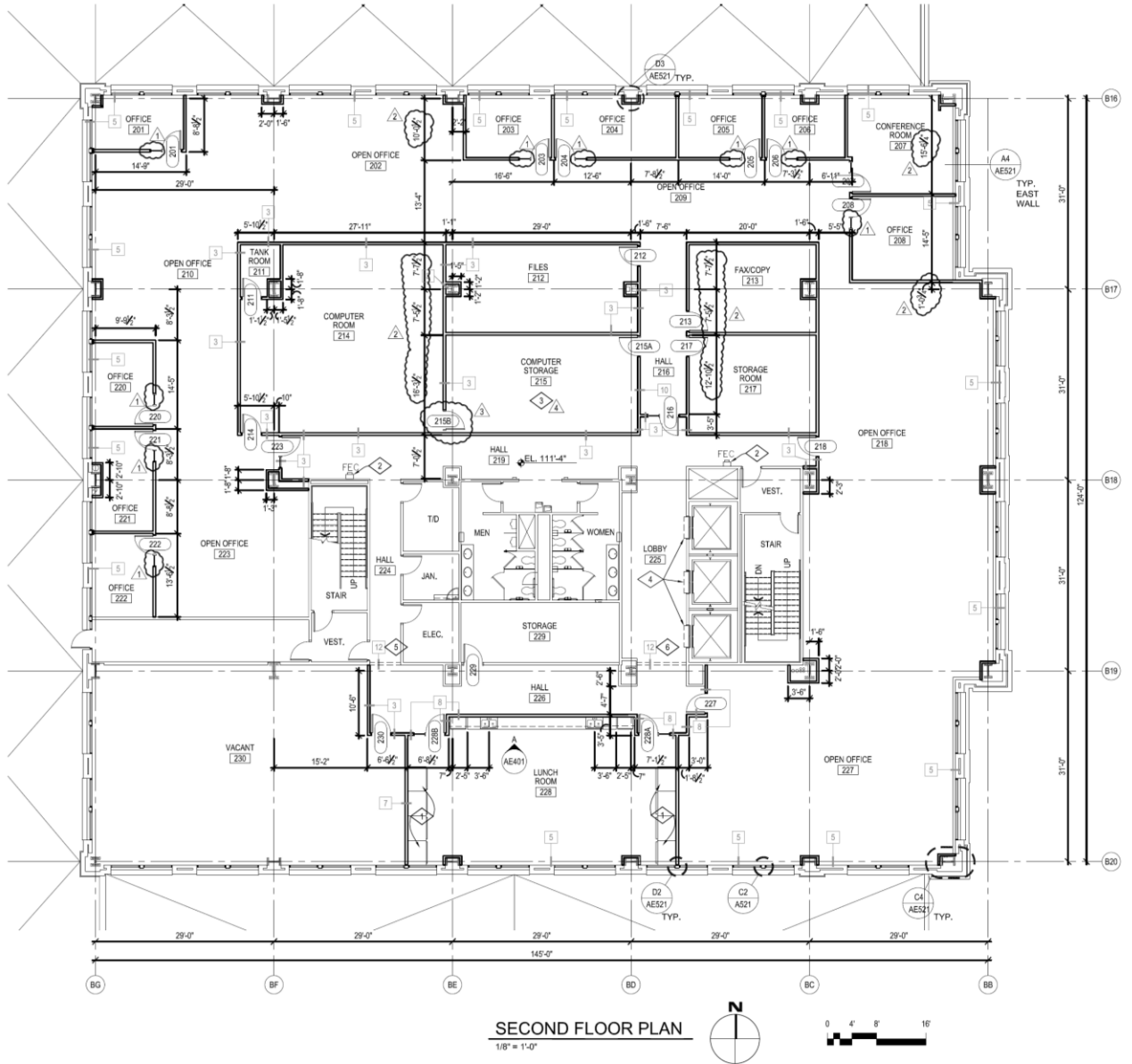


AUG.2022

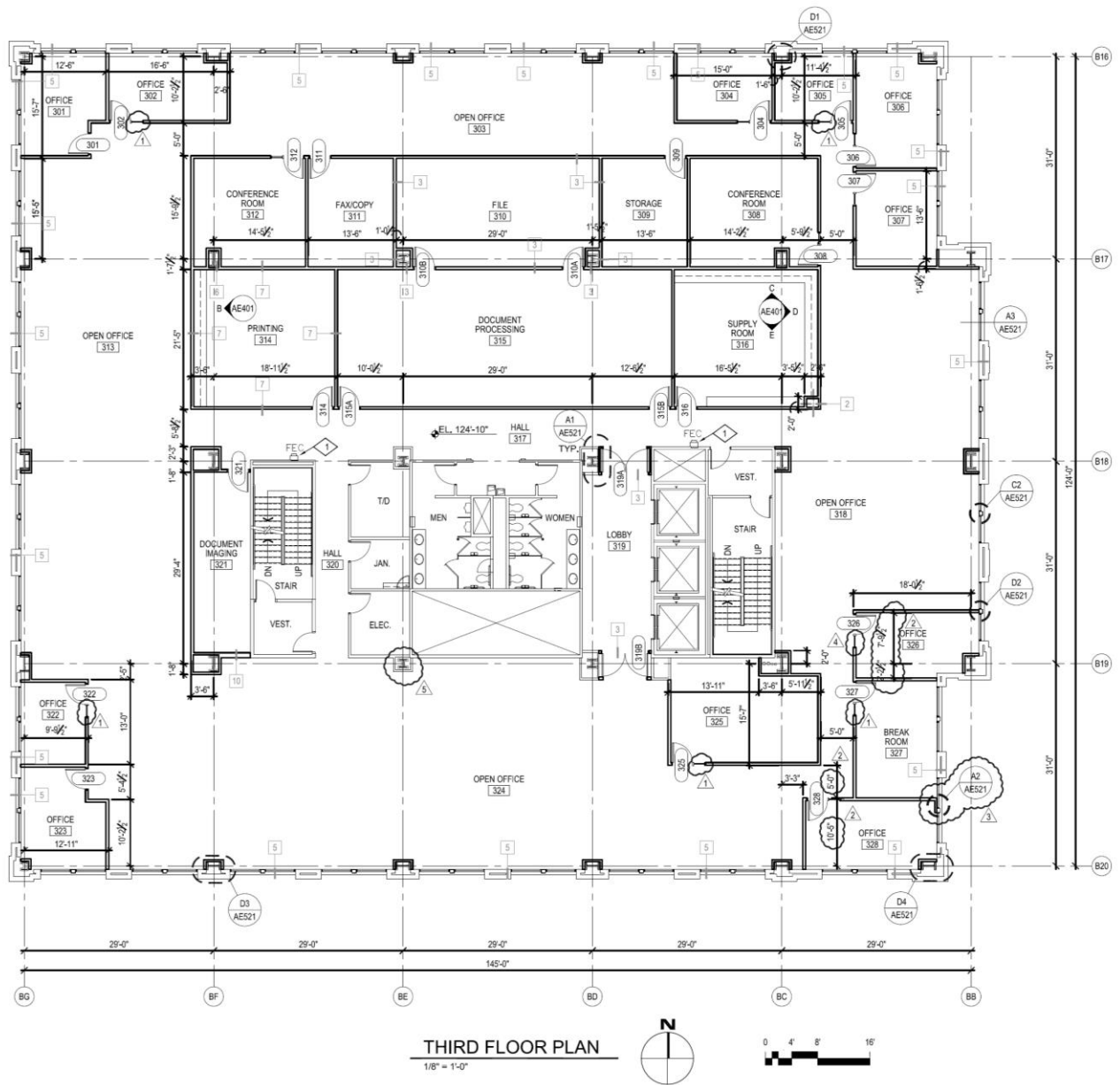
3.2 Mezzanine/P+3



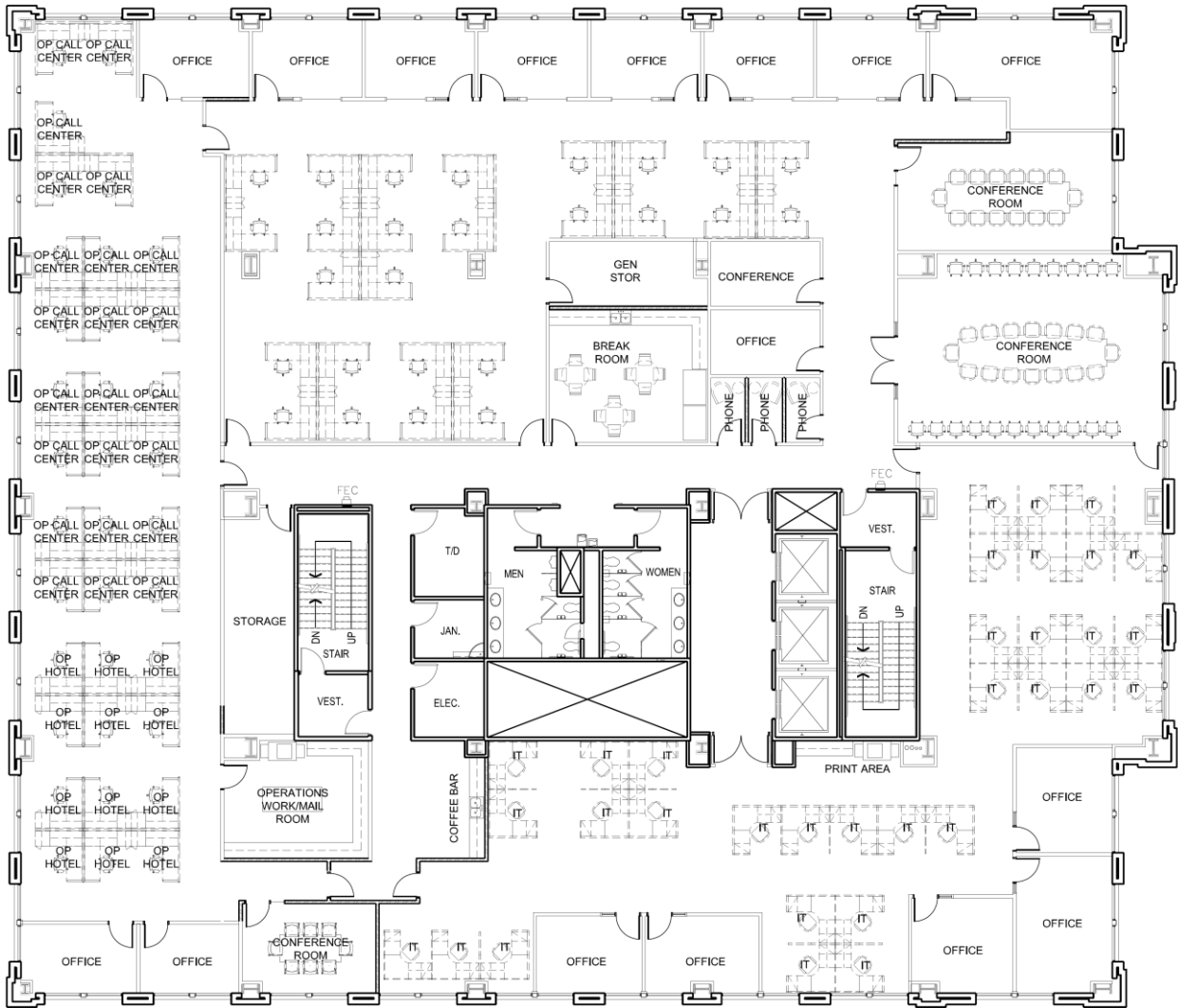
3.3 2nd Floor (17,780 sq. ft)



3.4 3rd Floor (17,780 sq. ft)



3.5 4th Floor (17,780 sq. ft), Proposed Layout for my529 Consolidation



To: Chair Lisa Michele Church, Vice Chair Jesselie Anderson, and Commissioner David Woolstenhulme

From: President Taylor Randall, President Noelle Cockett, President Brad Mortensen, President Mindy Benson, Interim President Stacey McIlff, President Biff Williams, President Astrid Tuminez, President Deneece Huftalin, President Brennan Wood, and President Clay Christensen

Date: September 2, 2022

Subject: Counterproposal to USHE Online

As a united group of presidents, we appreciate the invitation that came on July 1 to offer a counterproposal to the USHE Online plan that was presented last spring. We believe there is a more financially prudent, efficient, timely, and effective method to fulfill the Access, Completion, and Workforce Alignment goals of the Utah Board of Higher Education 2021 Strategic Plan than developing a new USHE Online managing unit to duplicate existing efforts.

In summary, our counterproposal includes the following four components:

- The board requests a report of **existing innovations and ongoing creative efforts** already occurring or in place at USHE institutions to provide a fuller understanding of the breadth, quality, and impact of these innovations. Such a report is currently being pulled together and if desired can be presented.
- A request that the board establishes systemwide and institution-specific **targets for increasing completion among the some college, no degree (SCND) population**. The same methodology could be used that established access targets for the number of students enrolling within the first three years of high school graduation. Although not currently included as part of the performance funding plan, these targets could be used to measure the effectiveness of institutional innovations to serve this population through both technologically enhanced and in-person programs.
- The establishment of a **USHE Job & Degree Portal** that markets opportunities to potential SCND students and helps them navigate pathways available at institutions. See Appendix 1 for a full description.
- A charge to develop the **USHE Online Collaborative** (led by the USHE Chief Academic Officers) to launch in the 2023-24 academic year as a solution for sharing and enhancing online programs that includes but is not limited to:
 - Expanding the availability of affordable online offerings, including credentials at all levels, that are aligned with industry workforce needs,

- Identifying flexible options for students to cross-register among institutions in order to promote timely completion,
- Incorporating prior learning to simplify and streamline degree pathways, and
- Sharing instructional design, quality assurance, e-learning, flexible scheduling, and other best practices to provide the best outcomes for the students.

In addition, please understand that we have numerous concerns with the Cicero Group's report, *USHE Online Concept Validation Study* and subsequent *Market Sizing Assumptions and Context*. In reviewing the study, we found that its conclusions about the overall market for SCND students, job placement guarantees, the feasibility of low-cost options, and assumed market advantages in terms of cost, quality, and flexibility render the study less useful than we had hoped. Furthermore, it also does not account for the number of SCND students being served by USHE institutions currently. A full explanation of our concerns with the Cicero *USHE Online Concept Validation Study* and *Market Sizing Assumptions and Context* can be found in Appendix 2.

As a group, we are united to provide additional online and technology-enhanced solutions for all of our students, and also increase the number of SCND who return to finish their credentials. If the board supports our proposal, we ask for consideration of including a budget request in the 2023-24 Utah Board of Higher Education legislative request to provide resources to establish the Job & Degree Portal and launch the USHE Online Collaborative.

We look forward to discussing this proposal with you in greater detail at the September 7 Executive Committee meeting of the board and beginning the collaborative process with the board, USHE staff, and presidents to make decisions on how to proceed.

CC: Geoff Landward, Julie Hartley, and Scott Wyatt

Attachments:

- Appendix 1 - COP Proposal for SCND Utah Students
- Appendix 2 - Response by USHE Presidents to USHE Online Concept Validation Study by Cicero Group

USHE Job and Degree Portal

Online is a vehicle for SCND students who want to finish what they started but may not have the means to attend in person. We will, through a system approach, target these students with customized information about their degree progress in relation to existing online offerings, highlight the gaps/remaining requirements, and help students take the next steps to return and finish their education or add additional skills for new employment opportunities.

What system-based actions will support us?

SCND and any returning student have a few basic questions they want answered.

1. How much will this cost- the first question we get consistently is can I afford this?
2. What jobs are available or what might I do with the degree?
3. How long will this take? (Relates to cost and overall perception of ROI)
4. I already have some credits so how will those help?
5. Can I get credit for things I have done or skills I have developed (PLA/CPL) and then how long will it take for that to be evaluated and how much will it cost?

In short, they want to know what jobs are available, how long will it take to obtain the required degree, and how much will it cost?

The system, with cooperation amongst the institutions, can be *the* mechanism by which SCND students are informed about market needs and job opportunities, get answers and results to their PLA/CPL questions, and identify and enroll back into programs that best meet their needs. How would this work?

Proposal

We would propose a **robust marketing** effort from the state/system targeting these students that drives them to a ***Job & Degree Portal*** which connects them with a person, the ***Navigator***.

Imagine someone who at 2 am says “I need to get back into school....” From there....

1. The student enters the Job & Degree Portal and begins interacting with a Chatbot that guides them through their various questions (some from above and others).
2. Most importantly the student can understand what job options look like for them (ties into state systems and provides job outlooks for 1, 3 and 5 years), a path to the degree they need for those options, the USHE institutions offering that online degree, a sense of time and cost, and actions they can take the next morning based on what they have learned. So.....
3. The Navigator reaches out to the student to initiate a dialogue about the student’s interests, experience, etc. and guides to next steps in the process.

4. Depending on what the student can submit immediately or gather quickly they will have that evaluated and a path to degree completion presented to them from the possible institutions.
 - a. This evaluation would include-
 - i. Prior courses completed (transcripts needed- we can support that process).
 - ii. Possible challenge exams they might consider depending on their experience that has been gleaned from their questions and other interactions. You can also schedule a place and time for the exams here or take them from that site.
 - iii. Portfolio or other evidence-based assessments they would submit for credit (2–3-minute video tutorials available).
 - b. The results of these assessments must be available quickly (days at most) for the student, so they know what the path to completion looks like.
5. The student now knows their path forward, how long it will take and a sense of cost.
6. The system would then connect the student with possible funding sources (these have been shown earlier) and how a student would qualify for those resources.
7. The system described here is the more “automated” version for students comfortable with that format. A second format will be required which has a more human touch (the Navigator). In other words, at each level the student must be able to contact a “living” person if they have questions. Our experience and the research clearly show this as a critical option for this population.
8. The goal is this- the student who started at 2am on a Tues morning has a strong sense of what is possible by Wed. afternoon and even if they have complex portfolios for review, or need refreshers for challenge exams, they will know exactly what will be required for a degree within one week if they submit the material (with our help). They also have a human point of contact (the Navigator) if they have more questions.
9. How will things like portfolios be reviewed as this is the most labor and time intensive part of the process?
 - a. The majors’ committees would be charged with establishing what the PLA/CBE standards for each of the 4-5 most likely challenged courses would be. These standards will then be accepted across the system for transfer needs.
 - b. Students will submit portfolios into a system level portal. Think of this as a PLA/CBE Clearinghouse.
 - c. Once submitted the portfolio will be evaluated by faculty who are compensated for their review but must turn around the review in 72hrs.
 - d. The review is based on the agreed upon standards from the majors committee and so credit is then awarded and is transferable to all system institutions.

There are further details required, but our purpose here was to lay out enough detail for a basic model that the system could pursue that would then support the institutions in their ability to serve the needs of the SCND population in Utah with an online platform.

The key is the system supports the student's efforts to re-engage in their education and the institutions then assist the student in fulfilling their goals. Students, once they are informed, choose the institution that best meets their needs. This encourages institutions to build on online offerings they already have and pursue even more innovative solutions and options for the SCND population coming through the state portal. This furthers the value of the investment in the portal as the state continues to innovate in the higher education sphere.

In short, we propose a statewide campaign targeted at the SCND population which directs them to a web presence that allows them to explore job opportunities, assesses where they stand relative to the degrees needed for jobs they are interested in, employs a clearinghouse model that facilitates the rapid evaluation of their educational preparation, and finally provides them with a personalized path to completion *at the Utah institution that best meets their needs*. This would place Utah, nationally, at the forefront of delivering high quality educational opportunities to the SCND population.

Appendix 2

Response by USHE Presidents to USHE Online Concept Validation Study by Cicero Group

September 2, 2022

President Randall originally raised the idea of an external study in a Council of Presidents meeting in order to understand the market for online programs as well as the demands and interests of the “some college, no degree” (SCND) population in Utah. The study that Cicero conducted appears instead to focus on validating the USHE Online Concept. It has not addressed core questions, including: 1) What is the problem we are trying to solve? 2) What is the credible size of the addressable market or population? 3) What are the USHE institutions already doing to solve the problem? And 4) Why is a new, online institution the answer to all this?

We would like to highlight other limitations of the study.

COSTS RELATIVE TO WHAT CURRENT INSTITUTIONS HAVE ON OFFER

- The SCND market would be attracted to a “low cost” option. A new online institution cannot offer a lower price point without requiring heavy state subsidies for setup, infrastructure, and student support services that are already available at existing institutions. It is, in fact, likely to make higher education in Utah more expensive for students and taxpayers.
- The assumptions behind the “Base to Best Case” and “Base to Realistic Case” scenarios demonstrate a high preference for a new institution if it is given significant market advantages in terms of cost, flexibility, etc. These factors are held constant at the USHE comparison institutions. Would it not be an option to explore the impact of those same cost and flexibility variables at existing institutions? Given the same market preferences, we believe our already **accredited**, brand-recognized programs and increasing number of online offerings could have the same or higher impact on the target student market segments.
- Interestingly, the study finds that 75% of individuals indicate that a more affordable option would be most attractive if they decided to return to school. While three in four seems like a high number, we’re surprised it isn’t much higher and find it interesting that 100% of respondents would not prefer a more affordable option. This undermines the suggested magnitude and credibility of other findings.
- Technology is constantly changing. By the time sunk costs are made in a new online institution (to compete with other institutions that have massive, first-mover advantage like WGU, ASU and SNHU), technology and other innovative entrants to the education space might make well make this new online institution an uncompetitive option.
- The Cicero study makes claims about affordability that are not accompanied by data. The study defined cost as “price per course (after financial aid),” not as “sticker price.” The presumption of the study is that only a new institution could have such a price point. A better understanding of the actual price per course after financial aid at each existing

institution offering completely online programs (including completely online general education) would inform the pricing findings.

- The study does not point to any reasonable comparable institution. Even WGU is charging ~\$7K per year, which is already higher than the “sticker price,” for example, for online programs at certain USHE institutions.

NATURE AND SIZE OF MARKET

- The data from the Cicero that reviews the size of the SCND market indicates that general interest in degrees is low, and the likelihood of SCND folks resuming their education is even lower. Nearly 75% of respondents indicated that they are less interested in pursuing a degree program in the next two years, and one in three (32%) indicated they have a good job and do not need a degree.
- The target market, as shown in Cicero’s follow-up *Market Sizing Assumptions and Context*, is really beyond Utah’s borders to regional and national audiences. Is that what the Utah Board of Higher Education and interested legislators want? How will they compete with other national online behemoths like WGU, SNHU, and ASU?
- Students tend to favor institutions with which they are already familiar and that are close to them. 87% of Some College No Degree participants in the Cicero study identified existing institutions as their preference - the U (22.4%), SUU (19.7%), UVU (17.3%), and USU (16.8%) were individually preferable over a new public/state online university (12.7%). Nationally, 66% of online undergrad and 63% of online grad students live within 50 miles of their institution. (Source: Education Dynamics [Online-College-Students-2021.pdf](#). Section 5, Page 51) This implies that current online offerings at the USHE institutions would be a faster and cheaper way to meet Utah online needs.
- The report fails to note how many SCND students USHE schools are already serving. For example, WSU enrolled 1,872 returning SCND students in Fall 2021. This lack of clarity or definition about the SCND market segment will lead to cannibalization of existing efforts within USHE institutions for these students. This is counter to Marketing 101 -- do not introduce products that will unintentionally displace existing products because it has the impact of hurting other revenue streams.

JOB PLACEMENT

- Many students want “guaranteed” job placement or pay raises before they begin or return to a college/university to earn a degree. We should engage our industry partners for their perspectives on this. Obviously, a job is not something any institution can guarantee, including a new online institution.

MODALITY

- Surveyed persons expressed strong interest in self-paced courses. Strong evidence exists that students are most successful when the faculty sets the pace. Some

restrictions also exist because federal laws require engagement with faculty. A fully “work at your own pace” correspondence model would not be accredited.

GENERAL COMMENTS

- See pages 17-19: Why did Cicero exclude Utah Tech, Salt Lake Community College, and Snow College as options for earning online degrees? In the case of Utah Tech, they have 13 online degree programs. In the case of the two-year institutions, it tilts the respondents to think only in terms of four-year degrees and not two-year or certificate options. Excluding these institutions affects the overall analysis.
- The study does seem to validate the importance of affordable, flexible, asynchronous online programs to attract and serve SCND populations interested in pursuing a degree.
- Overall, we would like to have the degree-granting institutions given the opportunity to solve perceived issues instead of always hiring a consultant and then creating a system solution. We are all part of the system and thus should be granted the ability to address those needs together.



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

TAB E

September 16, 2022

Hispanic-Serving Institutions (HSI)

At least five USHE colleges and universities—including the University of Utah, Weber State University, Utah Tech University, Utah Valley University, and Salt Lake Community College—are considering becoming a Hispanic-Serving Institution (HSI). Weber State University President Brad Mortensen will share how his institution is working toward becoming an HSI, with further considerations for the system.

Definitions

According to the [Hispanic Association of Colleges and Universities](#), Hispanic-Serving Institutions (HSIs) are [defined in Title V of the Higher Education Act](#) as not-for-profit institutions of higher learning with a full-time equivalent (FTE) undergraduate student enrollment of at least 25 percent Hispanic. Eligibility is monitored annually.

Title V eligibility (i.e., meeting the Federal definition of an HSI) is determined by the U.S. Department of Education as the first step in the application process for a Title V grant. To qualify as an HSI under Title V, a college or university should have (1) an FTE enrollment of undergraduate students of at least 25 percent Hispanic students and (2) not less than 50 percent of all students are eligible for need-based Title IV aid.

The [Department of Education](#) offers grants to institutions defined as HSIs, which can be used for many academic purposes serving all ethnicities at the institution, including:

- Faculty development
- Funds and administrative management
- Development and improvement of academic programs
- Endowment funds
- Curriculum development
- Scientific or laboratory equipment for teaching
- Renovation of instructional facilities
- Joint use of facilities
- Academic tutoring
- Counseling programs
- Student support services

Commissioner's Recommendation

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



September 16, 2022

Campus Safety and Equity Advisory Council (CSEAC)

Background and Structure

The [Campus Safety and Equity Advisory Council \(CSEAC\)](#) was formally established by the Utah Board of Higher Education in November 2021. As it enters its second academic year, CSEAC continues to serve as an organized feedback group of students from diverse backgrounds, identities, and lived experiences to ensure institutional and state-level safety and equity-related policies, procedures, and programs successfully capture the perspective of students pursuing their education at Utah's degree-granting public colleges and universities.

Students from seven of USHE's eight degree-granting institutions applied to be members of the 2022-2023 council. CSEAC is chaired by the degree-granting student Board member and consists of 16 students selected from nine campuses around the state (returning members are listed in bold font):

- Que Begay; USU-Blanding
- **Tiffany Chan (Vice Chair); U of U**
- Reed Hammond; SUU
- **Alayne Jenkins; USU-Eastern**
- Ta'Mariah Jenkins; USU-Logan
- Isamara Jimenez; USU-Logan
- **Julyssa Lopez; Westminster**
(*exception*)
- Nahjae Malone; UTU
- **Laiza Moreno; UTU**
- **Colette Mortensen; WSU**
- Daira Rodriguez; UVU
- **Aarushi Rohaj; U of U**
- Alejandra Henriquez Roncal; UTU
- Melody Sadrin; U of U
- **Lindsay Simons; SLCC**
- Ruby Vejar; WSU
- Xitlalli Villanueva (Chair); WSU

CSEAC holds seven virtual meetings throughout the school year. Members may serve up to two academic years and receive a \$1,000 scholarship per academic year of service. CSEAC utilizes a shared leadership model that includes holding annual elections for vice chair and providing different council members the opportunity to facilitate dialogue and present to the Board's Student Affairs Committee.

In CSEAC's first 2022-2023 meeting (September 24), members will build rapport and engage in an activity to identify their top Board's Strategic Plan priorities, which will help determine a schedule of dialogue topics for the coming year.

After receiving feedback that the CSEAC's meeting schedule and topics of conversation did not always appropriately accommodate technical college students, OCHE identified two ways to ensure technical college students' perspectives on topics relating to equity and safety are recognized:

1. The technical college student Board member will attend CSEAC meetings when available to gain insight and lend opinions.
2. The technical college student Board member will facilitate two 90-minute virtual focus groups during their term of service. OCHE will work with faculty and staff at all eight USHE technical colleges to help recruit up to 16 students per focus group. Students will be financially compensated for their time.

Ensuring Visibility, Accountability, and Stakeholder Engagement

We have purposefully and meaningfully engaged campus, student, staff, and community stakeholders who may be affected by this potential course of action by:

- Enlisting the help of faculty and staff in recruiting CSEAC applicants and technical college focus group participants
- Creating space for students to voice their opinions and thoughts on issues of safety and equity that impact them and their peers

CSEAC intervenes in existing educational disparities and closes attainment gaps by shedding light on the experiences of marginalized populations and identifying actionable steps to provide a more equitable postsecondary experience for Utah students. Following each CSEAC meeting, OCHE staff code meeting transcripts and create a meeting report to quantify, prioritize, and categorize the qualitative feedback shared in the meeting. At the end of each semester, OCHE also delivers a report to CSEAC members outlining what the Board and institutions are doing to address safety and equity, recommendations for how the Board can act on the council's feedback, and plans for how OCHE will relay the council's feedback to institutions.

Commissioner's Recommendation

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



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

TAB G

September 16, 2022

Strategic Plan

In 2020, Utah's two higher education systems merged, creating a single system of 16 higher education institutions. The newly created Utah Board of Higher Education embarked on a strategic planning process to guide the new System for the next five years. To develop the strategic plan, the Board and Office of the Commissioner of Higher Education engaged in a rigorous, collaborative, and creative process that built on past initiatives from previous boards and incorporated feedback from institutions, state leaders, students, and other stakeholders. The Board formally adopted the strategic plan at the May 2021 Board meeting.

During the October 2021 Board Committee meetings, each committee adopted specific strategies within the strategic plan that are relevant to the focus of that committee. Each Board committee ensures that their assigned strategies are progressing and on-track and structures their committee agendas around these strategies.

In the year that the strategic plan has been in place, several revisions have been proposed to make sure the plan stays nimble and current. During the August and September 2022 committee meetings, each Board committee considered changes to the strategies assigned to their committee, and forwarded their recommendations on any changes to the full board for consideration at the September 2022 board meeting. In order to address the goals for the revision process, administrators and staff within the Office of the Commissioner of Higher Education then made minimal changes to language between committee meetings and the Committee of the Whole.

Attachment 1 details the proposed updated strategic plan. Attachment 2 details the proposed updated strategic plan including edits.

Commissioner's Recommendation

The Commissioner recommends the Board adopt the revised strategic plan.

Attachments

Attachment 1: Updated Strategic Plan

Priority: System Leadership

Board's Role: Oversee and lead The Utah System of Higher Education for the benefit of all Utahns.

Goal: Develop, strengthen, and leverage an equitable, seamless, and articulated system of higher education

Strategies & Tactics:

1. Provide strategic oversight for institutional roles and missions and program offerings to fully incorporate all institutions within a single system.
 - a. Align programs within institutional roles and address unnecessary program duplication across the system.
 - b. Revise policies governing institutional roles, award types, across degree-granting institutions and technical colleges, and faculty workload at degree-granting institutions.
2. Unify system policies, data, and measures.
 - a. Review policies to ensure alignment between technical colleges and degree-granting institutions.
 - b. Align data and measurements between tech colleges and degree-granting institutions.
3. Engage boards of trustees on delegated responsibilities.
 - a. Train boards of trustees on program approval process (include verifiable workforce needs); tuition processes; equity, diversity, and inclusion; etc. Develop ongoing training for trustees.
 - b. Develop qualifications for Board members that prioritize equity and diversity. Advocate that boards of trustees have similar qualifications.
 - c. Facilitate Board of Trustees consortium group.
4. Reevaluate presidential evaluation and R&R processes.
 - a. Support presidents in meeting expectations of the Board, including incorporating equity, diversity, and inclusion in evaluations and R&R.
5. Leverage Board policies and System leadership to close attainment gaps for each Utahn.
 - a. Review and revise all USHE policies aligned with closing attainment gaps through an equity lens on a 3-year basis.
 - b. Train Board, System, and institutional leadership on USHE Equity Lens Framework and concepts related to excellence in equity-mindedness and shared equity leadership.
 - c. Leverage System leadership to address equity-related practices and initiatives.
6. Implement shared services
 - a. Assess and prioritize opportunities for expanding shared services across institutions.
 - b. Support the implementation of shared services and measure gains in quality, risk mitigation, financial sustainability, and cost efficiency.
7. Strengthen and develop educational pathways to increase students' access to and completion of higher education aligned to Utah's workforce.
 - a. Lead cross-agency cooperation to create a shared goal and definition of educational pathways within Utah.
 - b. Collaborate with USBE, USHE institutions, and OCHE units to lead and coordinate all college-in-high school programs and pathways containing postsecondary coursework or credentials.
 - c. Develop a data collection and reporting framework to assess the quality of educational pathways within Utah.
 - d. Train and support Utah's Regional Pathways Coordinators to develop and implement clear educational pathways from technical colleges to regional universities.
 - e. Utilize Talent Ready Utah's connection to the workforce to align educational attainment with industry-validated occupations.
8. Ensure Utahns and key stakeholders are meaningfully informed on the value and return on investment (ROI) of higher education.
 - a. Develop and assess statewide marketing campaign.
 - b. Collaborate with institutions to develop legislative narrative to advocate the value of higher education.

Priority: Access

Board's Role: Remove structural barriers to entry

Goal: Increase the college-going rate of high school grads by 3% in 5 years

Goal: Increase the college-going rate of underrepresented groups by 4% in 5 years

Strategies & Tactics:

1. Ensure high school students are meaningfully informed on scholarships, dual enrollment programming, financial aid, and higher education pathways.
 - a. Expand the Utah College Advising Corps statewide. Determine the effectiveness of alternate program models. Evaluate program data to determine efficacy and best practices.
 - b. Facilitate greater regional collaboration among college access partners, with a focus on networking, training, and working toward shared college access goals aligned with the Board Strategic Plan.
 - c. Provide accessible training to access partners on USHE access programming to prepare them for meaningful conversations about post-secondary options.
 - d. In partnership with Success in Education, redevelop the USHE segment of the Keys to Success mobile app to provide the most actionable and essential pieces of information to high school students during their college selection process.
2. Simplify institutional admissions processes.
 - a. Identify system-level ways to simplify the admissions process for students and institutions.
 - b. Connect institutions to high school student data to improve access, particularly for underrepresented student populations. Implement the Single Student Identifier systemwide. Analyze available data to determine more inclusive future measures.
3. Support institutions in helping students secure their basic needs.
 - a. Empower institutions to adopt relevant best practices and deploy staff to case-manage with students in need of institutional and external basic needs services.
 - b. Elevate higher education's representation in state and local poverty reduction initiatives and enhance the Board's role in advocating for funding and policies that support institutional basic needs work.

Priority: Affordability

Board's Role: Remove structural barriers to affordability

Goal: Increase student ability to pay cost of attendance

Goal: Ensure institutional costs of attendance remains within the standard of affordability year over year

Strategies & Tactics:

1. Improve fiscal transparency and understanding.
 - a. Develop and implement full cost of attendance reporting standards and tools.
 - b. Refine the Board's standard of affordability.
2. Coordinate and optimize financial aid.
 - a. Evaluate, prioritize, and implement state student financial aid and scholarships.
 - b. Streamline statewide H.B.144 affidavit process. Benchmark student participation in affidavits. Clarify how citizenship data is collected and used in relation to scholarships and admissions forms.
 - c. Review and analyze the use of tuition waivers and identify opportunities for enhancing their efficacy.
 - d. Evaluate the quality, effectiveness, and return on investment of existing scholarship and financial aid programs, identify opportunities for better coordination and improvement.
3. Increase completion of the Free Application for Federal Student Aid (FAFSA).
 - a. Partner with USBE to consider ways to increase FAFSA completion in high school. Develop and implement a statewide FAFSA strategy.
4. Ensure institutions maintain strong fiscal health and operational efficiency.
 - a. Create a standardized cost structure model to compare the cost of delivering credentials across USHE and other relevant institutions.
 - b. Develop and implement a fiscal health assessment tool.
 - c. Update capital facilities funding policies and procedures to encourage efficient planning and requests.

Priority: Completion

Board's Role: Remove structural barriers to graduation

Goal: Increase timely completion of degrees and awards by 3% in 5 years

Goal: Increase the timely completion of underrepresented students by 4% in 5 years

Strategies & Tactics:

1. Facilitate completion and transfer among institutions within the system.
 - a. Conduct transfer study to determine barriers to transfer.
 - b. Facilitate coordination between institutions and among both technical and academic disciplines to align program structure and to support transfer and completion.
 - c. Review and update policies related to transfer and award structure.
 - d. Transition technical education from clock hours to credit hours.
2. Standardize awarding of credit for prior learning and ensure PLA aids in completion.
 - a. Implement consistent practices for the award of articulated credit, including training of faculty and staff, and annual institutional reporting of articulated credit awarded. Assess the impact of the award of articulated credit on student enrollment and completion.
3. Ensure systemwide institutional supports for student mental health and campus safety.
 - a. Identify and implement system-based mental health strategies and policies in accordance with institution mental health strategic plans being developed in partnership with JED Foundation and Huntsman Mental Health Institute.
 - b. Connect institutions with Title IX training opportunities, and support and empower institutions in developing strategies to address campus safety.
4. Expand supportive entry-level education practices.
 - a. Develop standards for placement, supportive instruction, co-requisite remediation, and other models to support student entry into and success in introductory academic college-level coursework and technical education.

Priority: Workforce Alignment

Board's Role: Prioritize and incentivize the approval of high-demand, high-wage programs aligned with workforce

Goal: Increase completion rate of graduates in high-demand, high-wage programs by 7% in 5 years

Goal: Increase the completion rate of underrepresented groups in programs aligned with high-wage, high-demand jobs by 8% in 5 years

Strategies:

1. Engage industry to align education with workforce demands that result in career placements.
2. Initiate industry feedback loops with the Utah Board of Higher Education.
3. Develop legislative priorities, policies, and funding requests for workforce development programs.
4. Increase stakeholder collaboration to develop and promote workforce programs.
5. Increase student participation in high-quality Work-Based Learning.

Note: The tactics for Workforce Alignment will be proposed at the November 2022 board meeting.

Priority: Research

Board's Role: Advocate for the role of research and support funding for research

Goal: TBD

Strategies and Tactics:

1. Advocate for the role of research at degree-granting institutions in innovation, technology transfer, economic development/workforce, and community engagement and impact.
 - a. Build research into legislative narrative and integrate role of research into strategic marketing campaign. Consider mechanism for research to be more ingrained in Board discussions and decisions.
 - b. Utilize Point of the Mountain Innovation Hub.
2. Ensure institutions have needed support to conduct research.
 - a. Consider one-time funds in 2022 budget request to support research facilities.
 - b. Include high-impact research initiatives in Board budget process.
 - c. Identify state-level issues, rely on degree-granting institutions to lead out on innovations and solutions and serve as leaders for other institutions through demonstrated partnerships and strategic funding.

Note: This priority was not reviewed. It will be rewritten, and the revision will be proposed to the board for approval at a later date.

Attachment 2: Updated Strategic Plan with Edit Details

Priority: System ~~Unification~~ Leadership

Board's Role: ~~Develop, strengthen, and leverage an articulated system of higher education.~~ Oversee and lead The Utah System of Higher Education for the benefit of all Utahns.

Goal: Develop, strengthen, and leverage an equitable, seamless, and articulated system of higher education.

Strategies & Tactics:

1. ~~Align programs with institutional roles and minimize duplication among institutions~~ Provide strategic oversight for institutional roles and missions and program offerings to fully incorporate all institutions within a single system.
 - a. ~~Study current program offerings across technical colleges and regional universities degree-granting institutions to ensure fit with institutional roles.~~ Align programs within institutional roles and address unnecessary program duplication across the system.
 - b. Review policies governing institutional roles, award types, across degree-granting institutions and technical colleges, and faculty workload at degree-granting institutions.
2. ~~Increase stackability of credentials from technical colleges to degree-granting institutions~~ [STRATEGY ELIMINATED AND ENCOMPASSED ELSEWHERE]
 - a. ~~Review policy governing award types across degree-granting institutions to ensure policies are equity minded and supported by data and allow for stackability across all institutional types. Review policy R473, R401, R472 for articulation and transfer between technical colleges and degree-granting institutions.~~ [MOVED TO SYSTEM LEADERSHIP, INSTITUTIONAL ROLES & REWORDED]
 - b. ~~Develop standardized approach to understand number of students utilizing current articulations between tech colleges and degree-granting institutions.~~ [MOVED TO SYSTEM LEADERSHIP, PATHWAYS & REWORDED]
 - c. ~~Develop standardized approach to understand number of secondary students receiving credit for course work completed at the high school.~~ [MOVED TO SYSTEM LEADERSHIP, PATHWAYS & REWORDED]
 - d. ~~Explore potential for transitioning technical education from clock hours to credit hours.~~ [MOVED TO COMPLETION, TRANSFER & REWORDED]
3. ~~Merge system policies and align data and measures as appropriate~~ Unify system policies, data, and measures.
 - a. Review policies to ensure alignment between technical colleges and degree-granting institutions. ~~Regularly review System policies to ensure they are equity focused.~~ [MOVED TO SYSTEM LEADERSHIP, EQUITY & REWORDED]
 - b. Align data and measurements between tech colleges and degree-granting institutions; ~~when appropriate~~
4. ~~Train~~ Engage boards of trustees on delegated responsibilities.
 - a. Train boards of trustees on program approval process (include verifiable workforce needs); tuition processes; equity, diversity, and inclusion; etc. Develop ongoing training for trustees.
 - b. Develop qualifications for Board members that prioritize equity and diversity. Advocate that boards of trustees have similar qualifications.
 - c. Facilitate Board of Trustees consortium group.
5. ~~Streamline~~ Reevaluate presidential evaluation and R&R processes.
 - a. Support presidents in meeting expectations of the Board, including incorporating equity, diversity, and inclusion in evaluations and R&R.
6. Leverage Board policies and System leadership to close attainment gaps for each Utahn.
 - a. Review and revise all USHE policies aligned with closing attainment gaps through an equity lens on a 3-year basis.
 - b. Train Board, System, and institutional leadership on USHE Equity Lens Framework and concepts related to excellence in equity-mindedness and shared equity leadership.

- c. Leverage System leadership to address practices and initiatives tied to Board equity-related resolutions
- 7. Implement shared services
 - a. Assess and prioritize opportunities for expanding shared services across institutions.
 - b. Support the implementation of shared services and measure gains in quality, risk mitigation, financial sustainability, and cost efficiency.
- 8. Strengthen and develop educational pathways to increase students' access to and completion of higher education aligned to Utah's workforce.
 - a. Lead cross-agency cooperation to create a shared goal and definition of educational pathways within Utah.
 - b. Collaborate with USBE, USHE institutions, and OCHE units to lead and coordinate all college-in-high school programs and pathways containing postsecondary coursework or credentials.
 - c. Develop a data collection and reporting framework to assess the quality of educational pathways within Utah.
 - d. Train and support Utah's Regional Pathways Coordinators to develop and implement clear educational pathways from technical colleges to regional universities.
 - e. Utilize Talent Ready Utah's connection to the workforce to align educational attainment with industry-validated occupations.
- 9. Ensure Utahns and key stakeholders are meaningfully informed on the value and return on investment (ROI) of higher education.
 - a. Develop and assess statewide marketing campaign.
 - b. Collaborate with institutions to develop legislative narrative to advocate the value of higher education.

Priority: Access

Board's Role: Remove structural barriers to entry

Goal: Increase the college-going rate of high school grads by 3% in 5 years

Goal: Increase the college-going rate of underrepresented groups by 4% in 5 years

Strategies & Tactics:

1. Ensure high school students are meaningfully informed on scholarships, dual enrollment programming, financial aid, and higher education pathways.
 - a. ~~Fund statewide expansion of the Utah College Advising Corps (UCAC). Ensure advisors are meaningfully trained on technical education opportunities. Evaluate program data to determine efficacy and best practices.~~ Expand the Utah College Advising Corps statewide. Determine the effectiveness of alternate program models. Evaluate program data to determine efficacy and best practices.
 - b. ~~Facilitate collaboration among college access partners such as TRIO, GEAR UP, AVID, Latinos in Action, USHE CE Directors, CTE directors, institutions, and advisors.~~ Facilitate greater regional collaboration among college access partners, with a focus on networking, training, and working toward shared college access goals aligned with the Board Strategic Plan.
 - c. Provide accessible training to access partners on USHE access programming to prepare them for meaningful conversations about post-secondary options.
 - d. In partnership with Success in Education, redevelop the USHE segment of the Keys to Success mobile app to provide the most actionable and essential pieces of information to high school students during their college selection process.
 - e. ~~Standardize structural and systemic processes and policies to ensure access of CE and TE in high school [MOVED TO SYSTEM LEADERSHIP, PATHWAYS & REWORDED]~~
2. Simplify institutional admissions processes
 - a. Identify system-level ways to simplify the admissions process for students and institutions.
 - b. Connect institutions to high school student data to improve access, particularly for underrepresented student populations. Implement the Single Student Identifier systemwide. Analyze available data to determine more inclusive future measures.
3. ~~Ensure systemwide institutional supports for student basic needs~~ Support institutions in helping students secure their basic needs.
 - a. ~~Develop baseline expectations for student basic needs for degree-granting/technical institutions. Support institutions in meeting baseline expectations.~~ Empower institutions

- to adopt relevant best practices and deploy staff to case-manage with students in need of institutional and external basic needs services.
- b. Elevate higher education's representation in state and local poverty reduction initiatives and enhance the Board's role in advocating for funding and policies that support institutional basic needs work.
- 4. ~~Support institutions and USBE in diversifying the pipeline of P-20 educators, faculty, and staff [STRATEGY ELIMINATED]~~
 - a. ~~Review policy to support all USHE institutions in their efforts to attract and retain diverse faculty and staff. Facilitate collaboration on best equitable hiring and retention practices.~~
 - b. ~~Use TH Bell Scholarship to recruit and financially support underrepresented students into the educator and counselor workforce. [MOVED TO AFFORDABILITY, COORDINATE AND OPTIMIZE FINANCIAL AID & REWORDED]~~

Priority: Affordability

Board's Role: Remove structural barriers to affordability

Goal: Increase student ability to pay cost of attendance

Goal: Ensure institutional costs of attendance remains within the standard of affordability year over year

Strategies & Tactics:

- 1. ~~Develop an expanded standard of affordability~~ Improve fiscal transparency and understanding
 - a. ~~Standardize the cost of attendance across all USHE institutions.~~ Develop and implement full cost of attendance reporting standards and tools.
 - b. Refine the Board's standard of affordability.
- 2. Evaluate and prioritize state student financial aid. Coordinate and optimize financial aid.
 - a. ~~Implement, evaluate, and prioritize state scholarships.~~ Evaluate, prioritize, and implement state student financial aid and scholarships.
 - b. Streamline statewide H.B.144 affidavit process. Benchmark student participation in affidavits. Clarify how citizenship data is collected and used in relation to scholarships and admissions forms.
 - c. ~~Review policy, statute, and procedures on waivers. Identify how waivers are being used at each institution.~~ Review and analyze the use of tuition waivers and identify opportunities for enhancing their efficacy.
 - d. Evaluate the quality, effectiveness, and return on investment of existing scholarship and financial aid programs, identify opportunities for better coordination and improvement.
- 3. Increase completion of the Free Application for Federal Student Aid (FAFSA).
 - a. Partner with USBE to consider ways to increase FAFSA completion in high school. Develop and implement a statewide FAFSA strategy.
 - b. ~~Study FAFSA completion in Utah and determine best practices from other states. [REMOVE AS ENCOMPASSED IN PRIOR TACTIC]~~
- 4. Develop a cost structure model to compare the cost of delivering degrees and awards for each USHE institution. Ensure institutions maintain strong fiscal health and operational efficiency.
 - a. ~~Create a model to compare the cost of delivering degrees and awards for each USHE institution.~~ Create a standardized cost structure model to compare the cost of delivering credentials across USHE and other relevant institutions.
 - b. ~~Expand cost study to include technical education.~~
 - c. Develop and implement a fiscal health assessment tool.
 - d. Update capital facilities funding policies and procedures to encourage efficient planning and requests.

Priority: Completion

Board's Role: Remove structural barriers to graduation

Goal: Increase timely completion of degrees and awards by 3% in 5 years

Goal: Increase the timely completion of underrepresented students by 4% in 5 years

Strategies & Tactics:

- 1. ~~Structure awards to~~ Facilitate completion and transfer among institutions within the system
 - a. Conduct transfer study to determine barriers to transfer.
 - b. Facilitate coordination between institutions and among technical and academic disciplines to align program structure and to support transfer and completion.
 - c. ~~Update policies on transfer from technical colleges to degree granting institutions~~ Review and update policies related to transfer and award structure.

- d. ~~Develop standardized approach to understand number of students utilizing current articulations between tech colleges and degree-granting institutions. [MOVED TO SYSTEM LEADERSHIP, PATHWAYS & REWORDED]~~
- e. Transition technical education from clock hours to credit hours
- 2. ~~Increase awarding of credit for prior learning~~ Standardize awarding of credit for prior learning and ensure PLA aids in completion.
 - a. ~~Implement annual institutional reporting of credit for prior learning, proactive communications to students, and training of faculty and staff and assess the impact of credit for prior learning on student completion. Ensure standardization in the awarding of credit for prior learning and the transferability of credit for prior learning.~~ Implement consistent practices for the award of articulated credit, including training of faculty and staff, and annual institutional reporting of articulated credit awarded. Assess the impact of the award of articulated credit on student enrollment and completion.
- 3. Ensure systemwide institutional supports for student mental health and campus safety
 - a. ~~Develop baseline expectations for mental health for degree-granting /technical institutions. Support institutions in meeting baseline expectations. Facilitate collaboration on best practices.~~ Identify and implement system-based mental health strategies and policies in accordance with institution mental health strategic plans being developed in partnership with JED Foundation and Huntsman Mental Health Institute.
 - b. ~~Develop baseline expectations for student safety for degree-granting /technical institutions.~~ Support institutions in meeting baseline expectations. Facilitate collaboration on best practices.
- 4. Expand supportive entry-level education practices
 - a. ~~Refine policy to~~ Develop standards for placement, supportive instruction, co- requisite remediation, and other models to support student entry into and success in introductory academic college-level coursework and technical education.

Priority: Workforce Alignment

Board’s Role: ~~Increase availability and stackability~~ Prioritize and incentivize the approval of high-demand, high-wage programs aligned with workforce

Goal: Increase completion rate of graduates in high-demand, high-wage programs by 7% in 5 years

Goal: Increase the completion rate of underrepresented groups in programs aligned with high-wage, high-demand jobs by 8% in 5 years

Strategic & Tactics

- 1. ~~Increase higher ed participation rate of adults with/without a high school diploma~~
 - a. ~~Collaborate with DWS and USBE to support enrollment of adult learners in academic and technical education.~~
 - b. ~~Identify what institutional services are currently supporting higher education for incarcerated individuals. Determine if System intervention is needed.~~
 - c. ~~Increase awareness of reskilling/upskilling for employed students to increase wage and employment progression.~~
 - 2. ~~Ensure students are meaningfully informed on the value and ROI of higher education~~
 - a. ~~Advocate for statewide marketing campaign. Focus on the unique needs of adult learners. [MOVED TO SYSTEM LEADERSHIP, EQUITY AND REWORDED]~~
 - b. ~~Ensure technical education program information, articulation of secondary course work, and opportunities for educational, career, and wage progression are represented in USHE online tools.~~
 - 3. ~~Increase student participation in work-based learning [INCLUDED IN REVISION]~~
 - a. ~~Consider policy to define systemwide practices for participation and reporting of work-based learning activities. Develop systemwide practices for participation in work-based learning activities.~~
- 1. Engage industry to align education with workforce demands that result in career placements.
 - 2. Initiate industry feedback loops with the Utah Board of Higher Education.
 - 3. Develop legislative priorities, policies, and funding requests for workforce development programs.
 - 4. Increase stakeholder collaboration to develop and promote workforce programs.
 - 5. Increase student participation in high-quality Work-Based Learning.

Priority: Research

Board's Role: Advocate for the role of research and support funding for research

Goal: TBD

Strategies and Tactics:

1. Advocate for the role of research at degree- granting institutions in innovation, technology transfer, economic development/workforce, and community engagement and impact.
 - a. Build research into legislative narrative and integrate role of research into strategic marketing campaign. Consider mechanism for research to be more ingrained in Board discussions and decisions.
 - b. Utilize Point of the Mountain Innovation Hub.
2. Ensure institutions have needed support to conduct research
 - a. Consider one-time funds in 2022 budget request to support research facilities.
 - b. Include high-impact research initiatives in Board budget process.
 - c. Identify state-level issues, rely on degree-granting institutions to lead out on innovations and solutions and serve as leaders for other institutions through demonstrated partnerships and strategic funding.



September 16, 2022

FY2023-24 USHE Operating Budget Request

The Fiscal Year 2023-24 USHE operating budget request was developed with consultation and discussion with the Council of Presidents, Business Vice Presidents, and Budget Officers for each institution. The request advances Board strategic objectives and balances adequate state tax funding to maintain affordability with current fiscal realities. The operating budget request complies with the Budget Development Process Guidelines adopted by the Board at the July 2022 meeting. For FY 2023-24, the Commissioner recommends a System operating budget request as follows:

1. Compensation and mandatory increases on par with state entities
2. Technical education institution priorities
 - a. \$10,200,000 for technical program growth and capacity
 - b. \$3,000,000 for technical education equipment
 - c. \$500,000 for custom fit
3. Degree-granting institution priorities
 - a. \$40,000,000 for performance funding institutional priorities
 - b. \$3,000,000 for degree-granting education equipment
 - c. \$987,000 for growth funding
4. Systemwide priorities
 - a. \$2,400,000 for cybersecurity
 - b. \$2,025,000 for student mental health
 - c. \$975,000 for student wellness case managers
 - d. \$850,000 for Technical education in degree-granting administration
 - e. Address unfunded operations and maintenance for state-funded buildings approved in the 2022 General Session

Additional information on the operating budget request is found in Attachment 1. Supplementary detail for each of the institutional requests is available upon request from the Commissioner's Office. Attachment 2 provides additional information on the funding formulas used to distribute: 1) technical education program growth and capacity, 2) technical education equipment, 3) degree-granting performance, and 4) degree-granting equipment.

Commissioner's Recommendation

The Commissioner recommends the Board approve the FY2023-24 USHE operating budget priorities and authorize the Commissioner to make any subsequent technical adjustments, including rounding, necessary to finalize the budget prior to submitting it to the Governor and Legislature.

Attachments

USHE – FY2023-24 Institutional and Board Priorities

Section 1: Compensation & Mandatory Increases

Faculty and staff are the backbone of the Utah System of Higher Education, and salary and benefits represent the single largest expenditure for USHE institutions. In order to reward performance and continue to attract world-class faculty and staff, the Board requests parity for USHE institutions with state employees in salary and benefit adjustments provided by the state legislature. Exact increases will be determined during the 2023 legislative session. The Board will also request funding for mandatory cost increases to insurance premiums, other state-provided internal service funds, as well as employee health insurance premium increases comparable to state employees. Typically, the legislature funds compensation increases with 75 percent state funds for degree-granting institutions and 100% for technical colleges, leaving 25 percent to be covered by tuition increases.

Section 2: Technical Education Priorities

\$13,700,000

Technical Education Growth and Capacity

\$10,200,000

USHE technical education institutions were asked to provide funding requests for regionally critical technical programs experiencing capacity challenges related to student demand. Institutions provided detailed funding requests including performance indicators and explanations for need and demand. Recommended total appropriations (bold) were determined by allocating 1) \$2 million based on FTE increase between FY21 and FY22, 2) \$5 million based on estimated completions for program growth & expansion, 3) \$2.2 million for institutional and student support activities, and 4) \$1 million for new school funding. Institutional plans for how they would use their portion of the growth and capacity funds are listed below in priority order, with additional detail available upon request.

Bridgerland Technical College

\$1,025,400

▪ Nursing	\$716,900
▪ Pharmacy Technician	\$122,100
▪ Medical Assisting	\$315,100
▪ Dental Assisting	\$210,900
▪ Central Sterile Technician and IT Staff	\$312,600

Davis Technical College

\$881,600

▪ Student Success and Retention Coaches	\$239,300
▪ Career & Academic Advisors	\$180,000
▪ High Yield Diesel	\$129,000
▪ High Yield Culinary	\$104,500
▪ High Yield Apprenticeship	\$108,300
▪ Diversity Officer	\$ 95,700
▪ Hybrid (Online) Education Transformation Specialist	\$ 93,000
▪ Student Success and Tracking Software (CRM Add-on)	\$ 40,000

Dixie Technical College

\$951,900

▪ Software & Computer Technology	\$445,000
▪ Transportation	\$369,000
▪ HVACR	\$128,000
▪ Healthcare	\$413,000
▪ Auto Tech Expansion	\$130,000
▪ Career Success Advisor	\$138,000
▪ Industrial Programs Expansion	\$245,000

Mountainland Technical College	\$2,797,400
▪ Apprenticeship Programs Expansion	\$530,000
▪ Health Programs Expansion	\$890,000
▪ Technology Programs Expansion	\$220,000
▪ Trades Programs Expansion	\$810,000
▪ Service Program Expansion	\$260,000
▪ Student Services Expansion	\$480,000
▪ Administrative Support Expansion	\$830,000
Ogden-Weber Technical College	\$1,246,500
▪ Practical Nursing Additional Cohort	\$465,000
▪ Expansion Instructional Operating Hours	\$500,000
▪ Plumbing Trades Program	\$350,000
▪ Facilities Technician	\$355,000
▪ Disadvantaged Student Support	\$500,000
▪ BDO Campus Security Coverage	\$100,000
Salt Lake Community College – Technical Education	\$786,600
▪ LPN Faculty and CNA Faculty Equity Adjustments	\$375,000
▪ HVAC Program Faculty	\$100,000
▪ CDL Program Faculty	\$100,000
▪ Electrician Program, Full-time Faculty	\$100,000
▪ Strategic Initiatives Director and Support	\$170,000
▪ Basic and Advance EMT Program	\$330,000
▪ Advanced Manufacturing A/D	\$110,000
▪ Architecture, Engineering Design Faculty	\$100,000
Snow College – Technical Education	\$378,900
▪ Medical Assistant (2 locations)	\$254,000
▪ Welding faculty position	\$106,400
▪ Building Trades 11 month contract increase	\$ 27,000
▪ TE Admissions and Registration	\$ 84,800
▪ Apprenticeship Coordinator	\$ 92,100
Southwest Technical College	\$306,800
▪ Full time faculty position - Welding Program	\$100,000
▪ Computer Science Adjunct Faculty	\$ 50,000
▪ Full time faculty position - Culinary	\$ 75,000
▪ Full time faculty position - Pharmacy Technician	\$ 45,000
▪ IT & Cybersecurity	\$100,000
▪ Student Services Expansion (Academic Advisor)	\$ 75,000
▪ Human Resources	\$ 38,500
▪ Distance Ed & Acc. Specialist	\$ 40,000
▪ Financial Aid Counselor	\$ 70,000
Tooele Technical College	\$875,400
▪ CDL Instructor and Operating Expenses	\$195,000
▪ Pharmacy Technician Instructor	\$147,000
▪ Marketing Access Recruiter	\$150,000
▪ Emergency Medical Technician Instructor	\$ 30,000
▪ Student Success Coordinator	\$120,000
▪ Automotive Technology Instructor	\$175,000
▪ Surgical Technician Instructor	\$135,000
▪ Machinist Technology Instructor	\$180,000
Uintah Basin Technical College	\$674,500
▪ Campus Security	\$210,000
▪ Advanced Energy Transportation	\$360,000
▪ CDL Expansion	\$240,000
▪ Energy Services Expansion	\$240,000

▪ Tower Technician	\$120,000
▪ Electrical High Voltage	\$240,000
▪ Auto Technology Expansion	\$110,500

Utah State University – Technical Education **\$275,000**

▪ Police Officer Standards Training in Southeast Utah	\$150,000
▪ CDL in Southeast Utah	\$450,000

Technical Education Equipment **\$3,000,000**

USHE technical education institutions and degree granting institutions with regional technical education service areas submitted requests for equipment needed for growing programs. The targeted funding amount was allocated based on half the funding equally split and half the funding on enrollment. Detailed equipment lists are available upon request.

▪ Bridgerland Technical College	\$356,500
▪ Davis Technical College	\$439,700
▪ Dixie Technical College	\$254,200
▪ Mountainland Technical College	\$414,800
▪ Ogden-Weber Technical College	\$385,800
▪ Salt Lake Community College – Technical Education	\$172,400
▪ Snow College – Technical Education	\$193,300
▪ Southwest Technical College	\$185,600
▪ Tooele Technical College	\$199,300
▪ Uintah Basin Technical College	\$185,700
▪ Utah State University – Technical Education	\$212,700

Custom Fit **\$500,000**

The custom-fit funding request of \$500,000 is to expand offerings and other support services for four institutions, including existing and expanding workforce, and new programs in Wasatch and Summit counties.

▪ Bridgerland Technical College	\$100,000
▪ Mountainland Technical College	\$300,000
▪ Tooele Technical College	\$ 50,000
▪ Uintah Basin Technical College	\$ 50,000

Section 3: Degree-Granting Institution Priorities **\$43,987,000**

Performance Funding **\$40,000,000**

The FY 2023-24 budget request for performance funding for degree-granting institutions is \$40 million. USHE institutions were provided a preliminary target funding amount for their institutional needs based on the statutory allocation of performance funding. Half of the funds are based on the institutions' percent of total system FTE, and half are based on institutions' percent of state appropriations. Institutional plans for how they would use their portion of the performance funds are listed below, with additional detail available upon request.

University of Utah **\$11,586,300**

▪ Career Services	\$3,000,000
▪ Student Mental Health	\$ 600,000
▪ Student Peer Mentoring	\$ 900,000
▪ Cybersecurity Infrastructure	\$2,000,000
▪ Applicant Review and Acceptance Process	\$ 200,000
▪ Capacity, Access and Growth	\$1,500,000
▪ Research Development	\$1,500,000
▪ Workforce	\$1,886,300

Utah State University **\$8,004,800**

▪ Pathways Initiatives	\$1,000,000
▪ Need-based Scholarships	\$2,000,000

▪ Campus Safety and Compliance	\$ 750,000
▪ Strategic Priority Initiatives	\$2,004,800
▪ Customer Relationship Management	\$1,500,000
▪ Graduate Student Initiative	\$ 750,000
Weber State University	\$4,081,600
▪ Mandated Costs	\$ 400,000
▪ Salary & Wage Enhancement	\$1,200,000
▪ Equity, Diversity & Inclusion	\$ 589,400
▪ Retention & Completion	\$ 388,200
▪ Personalized Learning & Academic Excellence	\$ 175,000
▪ Community Anchor Mission	\$ 479,000
▪ Marketing & Branding	\$ 150,000
▪ Other - Administrative Services Software	\$ 150,000
▪ Other – IT	\$ 550,000
Southern Utah University	\$2,638,200
▪ Faculty - Access & Market Demand	\$2,238,200
▪ Campus Safety & Shared Support Services	\$ 400,000
Utah Tech University	\$2,203,500
▪ Faculty and Staff Compensation	\$1,203,500
▪ Faculty Review and Rank Advancement	\$ 200,000
▪ Pluralsight Partnership	\$ 450,000
▪ Continue Transition to Division I Athletics	\$ 350,000
Utah Valley University	\$6,255,700
▪ Enhance Student Success and Accelerate Completion	\$ 800,000
▪ Institutional and Workforce Readiness	\$ 500,000
▪ Flexible Educational Opportunities for Timely Completion	\$1,700,000
▪ Digital Transformation/Cybersecurity	\$ 1,155,700
▪ High Demand Program Expansion	\$2,100,000
Snow College	\$1,273,000
▪ Success Coaches/Mentors	\$ 150,000
▪ Oracle DBA	\$ 105,000
▪ Student Tutoring Support	\$ 100,000
▪ Director of Admissions	\$ 109,100
▪ Wellness – Therapist	\$ 97,000
▪ 3+1 Program Development	\$ 80,000
▪ At-Risk Student Support	\$ 90,000
▪ Alumni Relations	\$ 97,000
▪ ADA Assistant	\$ 57,500
▪ Risk Management/Title IX	\$ 40,000
▪ HR Generalist	\$ 87,000
▪ General Counsel	\$ 180,000
▪ Workforce Redistribution	\$ 80,400
Salt Lake Community College	\$3,956,900
▪ Student Success	\$2,100,000
▪ Institutional Sustainability	\$1,856,900

Degree Granting Equipment**\$3,000,000**

Degree granting institutions have submitted requests for equipment needs for growing programs. USHE institutions were provided a preliminary target funding amount for their institutional needs based on the statutory allocation of performance funding. Half of the funds are based on the institutions' percent of total system FTE, and half are based on institutions' percent of state appropriations. Detailed equipment lists are available upon request.

▪ University of Utah	\$868,900
▪ Utah State University	\$600,400
▪ Weber State University	\$306,200
▪ Southern Utah University	\$197,800
▪ Snow College	\$95,500
▪ Utah Tech University	\$165,300
▪ Utah Valley University	\$469,100
▪ Salt Lake Community College	\$296,800

Growth Funding (Preliminary)**\$987,000**

The preliminary growth funding request of \$987,000 is to expand offerings and other support services for two institutions that have demonstrated significant enrollment growth. This well-established growth formula is based on actual year-to-year FTE enrollment increases in 100 FTE increments and associated direct instructional costs by course level. Enrollment FTE numbers will be updated in October after fall third week data is available.

▪ Utah State University	\$ 412,000
▪ Snow College	\$ 575,000

Section 4: Systemwide Priorities**\$6,250,000**

Three major areas have been identified for a systemwide funding request: \$3 million to support student mental health through regional wellness case managers, expanding existing on campus resources, and implementing JED campus strategic plans. \$850,000 to hire a Vice President for Technical Education at each of the three degree-granting institutions with a technical education role: USU, Snow, and SLCC. \$2.4 million to support system-wide cyber security

▪ Student Mental Health	\$2,025,000
▪ Cybersecurity	\$2,400,000
▪ Student Wellness Case Managers	\$ 975,000
▪ Technical Education Vice President at Degree-granting Institutions	\$ 850,000

In addition to these items, the system requests for currently unfunded operations and maintenance for state-funded buildings approved during the 2022 General Session.

**Technical Education Growth & Capacity Formula
Fiscal Year 2023-24 Budget Request**

Variables:					2,000,000	5,000,000	2,200,000	1,000,000			
Institution	FY21 FTE	FY22 FTE EST	FY21 - FY22 FTE Change	FY21 - FY22 FTE Change % of Total	(Part 1) % of Total Distribution	Growth & Program Expansion	Growth & Program Expansion % of Total	(Part 2) Capacity	(Part 3) Institutional and Student Support	(Part 4) New School	Total Allocation
USU - Technical Education	395	288	-	0%	-	26	2%	75,000	200,000		275,000
Snow - Technical Educaton		215		0%	-	62	4%	178,900	200,000		378,900
SLC - Technical Education	156	136	-	0%	-	30	2%	86,600	200,000	500,000	786,600
Bridgerland	781	829	48	26%	513,751	108	6%	311,600	200,000		1,025,400
Davis	1,097	1,142	45	24%	482,504	69	4%	199,100	200,000		881,600
Dixie	402	444	41	22%	443,232	107	6%	308,700	200,000		951,900
Mountainland	1,065	1,049	-	0%	-	727	42%	2,097,400	200,000	500,000	2,797,400
Ogden-Weber	910	939	30	16%	316,640	253	15%	729,900	200,000		1,246,500
Southwest	187	185	-	0%	-	37	2%	106,800	200,000		306,800
Tooele	216	237	21	11%	219,476	158	9%	455,900	200,000		875,400
Uintah Basin	183	186	2	1%	24,398	156	9%	450,100	200,000		674,500
Totals:	5,393	5,649	187	100%	2,000,000	1,733	100%	5,000,000	2,200,000	1,000,000	10,200,000

Technical college FTE reflects only certificate-seeking students

FY 2024 EQUIPMENT AMOUNT - TECH COLLEGES, USU-E Tech, SC Tech, SLCC Tech

\$3,000,000

DISTRIBUTION 50% EQUAL 50% FTE

Institution	1/2 Equal Split	% of Total	FY22 FTE	% of Total	1/2 Based on FTE	Eligible Funding Amount	% of Total
BTC	136,364	9.1%	829	14.7%	220,146	\$356,500	11.9%
DTC	136,364	9.1%	1,142	20.2%	303,307	\$439,700	14.7%
DXTC	136,364	9.1%	444	7.9%	117,831	\$254,200	8.5%
MTC	136,364	9.1%	1,049	18.6%	278,441	\$414,800	13.8%
OWTC	136,364	9.1%	939	16.6%	249,432	\$385,800	12.9%
SLCC - Tech	136,364	9.1%	136	2.4%	36,052	\$172,400	5.7%
SNOW - Tech	136,364	9.1%	215	3.8%	56,969	\$193,300	6.4%
SWTC	136,364	9.1%	185	3.3%	49,244	\$185,600	6.2%
TTC	136,364	9.1%	237	4.2%	62,896	\$199,300	6.6%
UBTC	136,364	9.1%	186	3.3%	49,321	\$185,700	6.2%
USU - Tech	136,364	9.1%	288	5.1%	76,360	\$212,700	7.1%
Total	1,500,000	100.0%	5,649	100.0%	1,500,000	\$3,000,000	100.0%

Sources: 2021-22 technical college certificate student FTE. Degree granting institutions include only technical education FTE.

FY 2024 ELIGIBLE PERFORMANCE FUNDING AMOUNT - DEGREE GRANTING

\$40,000,000

DISTRIBUTION 50% ENROLLMENT 50% APPROPRIATIONS

Institution	2021-22 Annualized Budget FTE	% of Total	50% \$ 20,000,000	2022-23 Total State Funded Appropriations	% of Approps	50% \$ 20,000,000	Eligible Performance Funding Amount	% of Total
UU	31,864	25.50%	\$5,099,400	\$423,054,200	32.44%	\$6,486,900	\$11,586,300	28.97%
USU	20,661	16.53%	\$3,306,500	\$306,399,100	23.49%	\$4,698,300	\$8,004,800	20.01%
WSU	14,318	11.46%	\$2,291,400	\$116,749,900	8.95%	\$1,790,200	\$4,081,600	10.20%
SUU	10,285	8.23%	\$1,646,000	\$64,704,900	4.96%	\$992,200	\$2,638,200	6.60%
SNOW	4,005	3.20%	\$640,900	\$41,224,000	3.16%	\$632,100	\$1,273,000	3.18%
UT	7,990	6.39%	\$1,278,700	\$60,308,100	4.62%	\$924,800	\$2,203,500	5.51%
UVU	23,439	18.76%	\$3,751,100	\$163,335,900	12.52%	\$2,504,600	\$6,255,700	15.64%
SLCC	12,410	9.93%	\$1,986,000	\$128,530,400	9.85%	\$1,970,900	\$3,956,900	9.89%
Total	124,972	100.0%	\$20,000,000	\$1,304,306,500	100.0%	\$20,000,000	\$40,000,000	100.0%

Sources: 2022-23 Appropriations Detail (sideways sheets) and USHE 2021-22 annualized budget related FTE.

FY 2024 EQUIPMENT AMOUNT - DEGREE GRANTING

\$3,000,000

DISTRIBUTION 50% ENROLLMENT 50% APPROPRIATIONS

Institution	2021-22 Annualized Budget FTE	% of Total	50% \$ 1,500,000	2022-23 Total State Funded Appropriations	% of Approps	50% \$ 1,500,000	Eligible Performance Funding Amount	% of Total
UU	31,864	25.50%	\$382,500	\$423,054,200	32.44%	\$486,400	\$868,900	28.96%
USU	20,661	16.53%	\$248,000	\$306,399,100	23.49%	\$352,400	\$600,400	20.01%
WSU	14,318	11.46%	\$171,900	\$116,749,900	8.95%	\$134,300	\$306,200	10.21%
SUU	10,285	8.23%	\$123,400	\$64,704,900	4.96%	\$74,400	\$197,800	6.59%
SNOW	4,005	3.20%	\$48,100	\$41,224,000	3.16%	\$47,400	\$95,500	3.18%
UT	7,990	6.39%	\$95,900	\$60,308,100	4.62%	\$69,400	\$165,300	5.51%
UVU	23,439	18.76%	\$281,300	\$163,335,900	12.52%	\$187,800	\$469,100	15.64%
SLCC	12,410	9.93%	\$149,000	\$128,530,400	9.85%	\$147,800	\$296,800	9.89%
Total	124,972	100.0%	\$1,500,100	\$1,304,306,500	100.0%	\$1,499,900	\$3,000,000	100.0%

Sources: 2022-23 Appropriations Detail (sideways sheets) and USHE 2021-22 annualized budget related FTE.



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

TAB I

September 16, 2022

Utah State University – Acquisition of Property by Exchange

Board Policy R703, *Acquisition of Real Property*, requires the institutions of Higher Education to seek Board approval for real property acquisitions that commit institutional funds in excess of \$1.5 million; Board Policy R704, *Disposal of Real Property*, requires Board approval of the disposal of real property with a price of more than \$1 million. Utah State University (USU) is requesting approval from the Board to acquire 64 acres of property located near 1500 West 4000 South in Wellsville, Utah, valued at \$2.09 million through an exchange of 7.67 acres of vacant property located at 2050 North 400 East, North Logan, valued at \$1.61 million. USU obtained independent appraisals to establish the fair market value of the property exchange. The difference in the market value will be paid by the College of Agriculture and Applied Sciences with farm commodity revenues.

Acquiring the property in Wellsville provides key access points to University owned properties and allows the Utah Agricultural Experiment Station (UAES) to produce additional feed to support livestock located at the adjacent Animal Science farm and near the Caine Dairy. The property in North Logan was used for research on agronomic and horticultural crops and practices, and urban development makes research on this site difficult. This function will move to other UAES controlled assets and sites deemed suitable for specific researchers' requests. Utah State University Board of Trustees approved the acquisition by exchange in their August 12, 2022, meeting.

Commissioner's Recommendation

The Commissioner recommends the Board authorize the property acquisition by exchange for Utah State University, as described in the accompanying documents.

Attachment



August 18, 2022

Commissioner Dave Woolstenhulme
Utah State Board of Regents
Board of Regents Building The Gateway
60 South 400 West
Salt Lake City, Utah 84101-1284

Subject: Real Property Acquisition by Exchange

Dear Commissioner Woolstenhulme:

Utah State University desires approval to acquire approximately 64 acres of agriculture property located near 1500 West 4000 South, Wellsville Utah, adjacent to the south farm property through an exchange of 7.67 acres of vacant property located at 2050 North 400 East, North Logan Utah as illustrated in Exhibits A and B.

Acquiring the property in Wellsville, provides two key access points making it more efficient to manage other University owned properties and will allow the Utah Agricultural Experiment Station (UAES) to produce additional feed to support livestock located at the adjacent Animal Science farm and near the Caine Dairy.

The North Logan property to be disposed was originally obtained to conduct research on agronomic and horticultural crops and practices. Urban development makes agronomic research at this site difficult due to interactions with the public and intentional, and unintentional damage to research plots. This function will move to other UAES controlled assets (i.e. Wellsville/Caine Dairy/Cache Junction farms) and sites deemed suitable for specific researcher requests due to the soil type and availability of dependable irrigation sources.

Independent appraisals were obtained by USU to establish the fair market value of the Wellsville and North Logan properties at \$2,090,000 and \$1,610,000, respectively, to complete an equivalent value transaction. The difference in market value will be paid by the College of Agriculture and Applied Sciences with available farm commodity revenues.

The Utah State University Board of Trustees approved the acquisition by exchange in their August 12, 2022, meeting.

We appreciate your support and request that this item be presented to the Utah Board of Higher Education during the September meeting.

Sincerely,

A handwritten signature in black ink, appearing to read 'D. Cowley', written over a light blue horizontal line.

David T. Cowley

Vice President for Finance & Administrative Services

cc: Juliette Tennert, Chief Financial Officer
Malin Francis, Director of Facilities & Planning
Noelle E. Cockett, President

EXHIBIT A

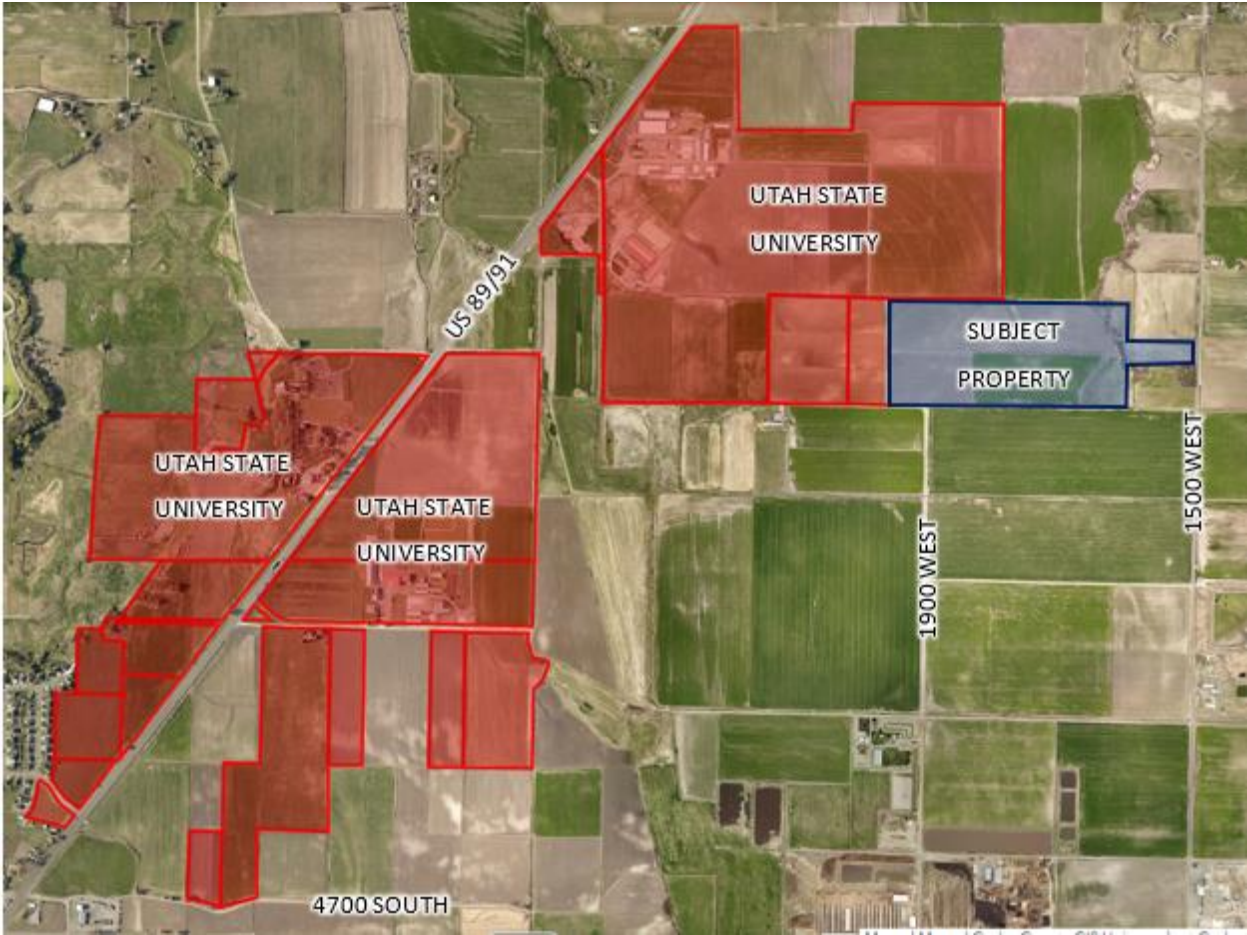
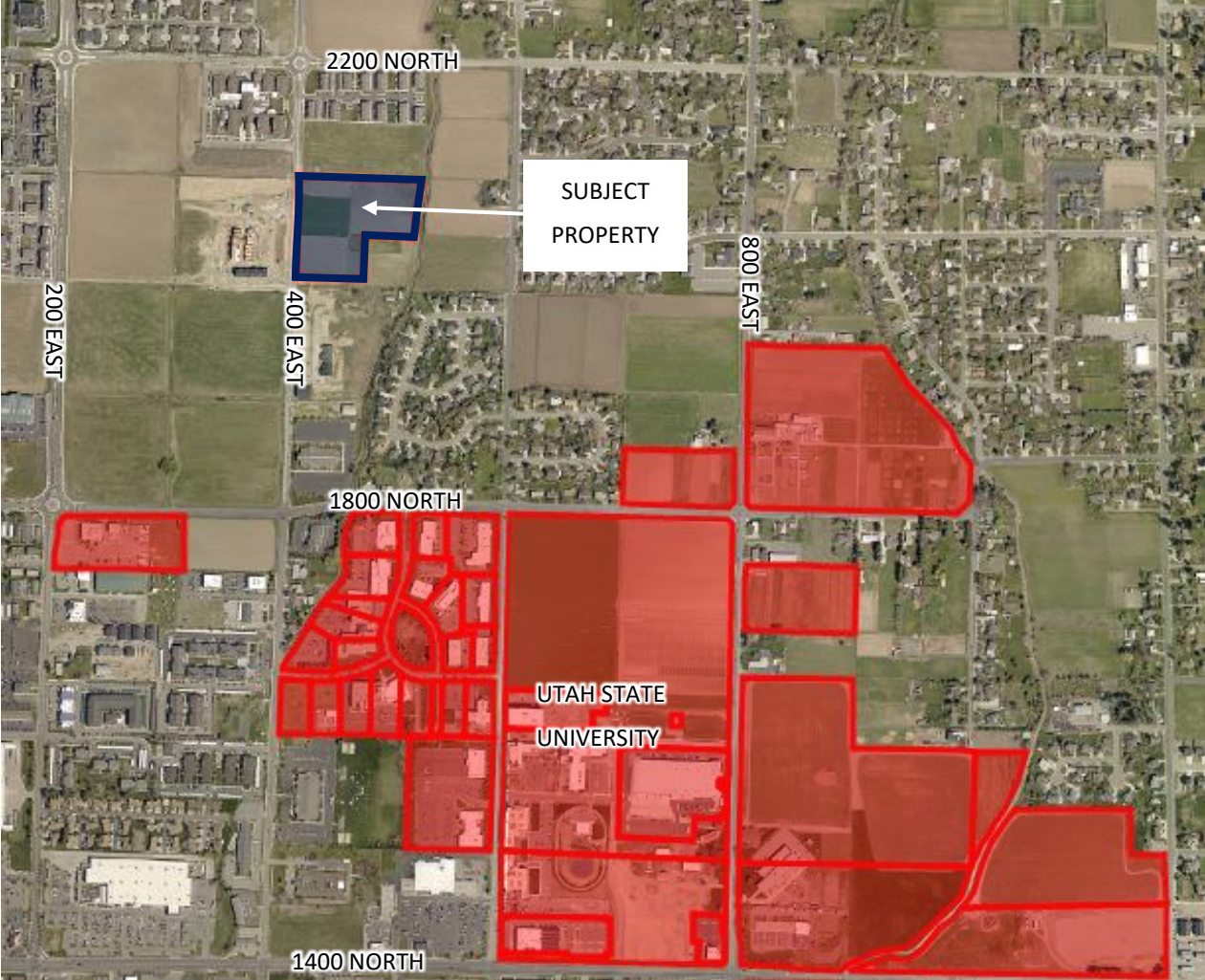


EXHIBIT B





September 16, 2022

University of Utah – Series 2022C Revenue Bonds

Board Policy R590, *Issuance of Revenue Bonds for Colleges and Universities*, requires the Board to review and approve the issuance and sale of revenue bonds. The University of Utah requests Board authorization to issue up to \$250,000,000 of General Revenue and Refunding Bonds for the purposes described in the following sections.

Request to Issue up to \$250,000,000 Authorized by State Legislature

The University of Utah requests Board authorization to issue General Revenue and Refunding Bonds for the following purposes that have been authorized by the state legislature:

- \$75,000,000 for the construction of the Med Ed Project, a 180,000 square-foot building that will replace the existing School of Medicine building. The University estimates that the MEB project will cost approximately \$185 million and will be funded through \$110 million of appropriations from the State Legislature and \$75 million of bonding proceeds. The University was approved in the 2017 session to bond up to \$190 million, and the Board approved the bonding of the MEDX Project in its December 18, 2020 meeting.
- \$25,000,000 for the construction of the Applied Sciences Project, a 40,700 square-foot renovation to the William Stewart Building, and a 100,000 square-foot addition. The University received \$60 million in State funding for the project in the 2021 legislative session and bonding authorization in the 2022 legislative session of up to \$25 million.
- \$100,000,000 for Refunding Outstanding Bonds. The University is seeking approval from the Board to refund up to \$100 million for all or any portion of the outstanding bonds issued by the Board on behalf of the University pursuant to certain parameters therein (including net present value savings of at least three percent). The Board approved a similar refunding authorization in its May 2021 meeting, and such authorization expires on November 18, 2022.

The relevant parameters of the requested issue are:

- Principal amount not to exceed \$250,000,000 (including costs of issuance and capitalized interest)
- Interest rate not to exceed 6.0%
- Discount from par not to exceed 2.0%
- Final maturity not to exceed 35 years from the date of issue

Attached is a copy of the request letter from the University, the approving resolution, and a financing summary from the financial advisor. Representatives from the University will attend the meeting to provide additional information and answer questions from the Board.

Commissioner’s Recommendation

The Commissioner recommends approval of the proposed Authorizing Resolution to issue General Revenue and Refunding Bonds for the University of Utah.

Attachments

August 23, 2022

Mr. David R. Woolstenhulme
Commissioner, Utah System of Higher Education
Board of Regents Building
The Gateway
60 South 400 West
Salt Lake City, UT 84101-1284

Dear Commissioner Woolstenhulme:

The purpose of this letter is to inform you of the University of Utah's plans to submit a bonding authority resolution (the "Resolution") to the Utah Board of Higher Education (the "Board"), to be considered during its September 2022 meeting, for the issuance of a General Revenue Bond or Bonds on behalf of the University of Utah (the "University") for the purpose of financing a portion of the costs to construct (a) the Medical Education Building project (the "Med Ed Project"), (b) the Applied Sciences Building project (the "Applied Sciences Project" and together with the Med Ed Project, the "Bonded Projects") and (c) authorization for refunding all or any portion of the outstanding bonds issued by the Board on behalf of the University for up to \$100,000,000 (the "Refunding Authorization"), together with other amounts necessary to pay costs of issuance, pay capitalized interest, if necessary, and fund any debt service reserve requirements. The University expects to price General Revenue Bonds for the Bonded Projects in November or December of 2022.

Details are as follows:

Authorization to Bond up to \$75,000,000 for the Construction of the Med Ed Project. The Med Ed Project is a 180,000-square-foot building that will replace the existing School of Medicine building, which opened in 1965 and no longer meets program needs. It will include teaching/learning space, anatomy/body donor student labs, medical simulation, community and study space, and offices for School of Medicine Administration. It will also include space for the University of Utah Global Health program. The University estimates that the MEB Project will cost approximately \$185.0 million and will be funded through \$110.0 million of appropriations from the State Legislature and \$75.0 million of bonding proceeds.

The University received legislative approval during the 2017 session to issue up to \$190.0 million in bonds, together with other amounts necessary to pay costs of issuance, pay capitalized interest, and fund any debt service reserve requirements, for a new health care facility project to be known as the "Medical Education and Discovery Complex" ("MEDX Project") and for a rehabilitation hospital. The University used \$52.5 million of bond proceeds for the construction of the rehabilitation hospital in 2017, leaving \$137.5 million of bonding authorization. The Board previously approved the bonding of the MEDX Project in its December 18, 2020 meeting for the amount of \$137.5 million. This authorization is a subset of that

previous authorization. The MEDX Project consists of two separate buildings, the Med Ed Project and the Sorenson Innovation and Discovery Center (the “Discovery Center Project”). The University expects to bond for the Discovery Center Project at a later day.

The University’s Board of Trustees (“Trustees”) approved such bonding in its August 2022 meeting.

Authorization to Bond up to \$25,000,000 for the Construction of the Applied Sciences Project. The Applied Sciences Project will provide critical updates to the educational and research facilities of the University’s Departments of Physics and Astronomy and Atmospheric Sciences. Together, the two departments teach more than 5,600 students and house 46 faculty members, who bring in over \$10 million in outside research funding annually. The new construction, a 40,700 square-foot renovation to the William Stewart Building and a 100,000-square-foot addition, is expected to result in a 56 percent increase in capacity for experimental and computer labs. These new spaces will allow those departments to address critical bottlenecks in science and technology degree programs. The total cost of the Applied Sciences Project is approximately \$89.0 million.

The University received \$60.0 million in State funding for the Applied Sciences Project in the 2021 State legislative session. The University received bonding authorization for the Applied Sciences Project during the 2022 Legislative Session of up to \$25.0 million, together with other amounts necessary to pay costs of issuance, pay capitalized interest, and fund any debt service reserve requirements. Additional funds for the remaining \$4.0 million of costs are expected to be received from the State and if not, University funds will be used.

The University’s Trustees approved such bonding in its August 2022 meeting.

Authorization to Bond up to \$100,000,000 for Refunding Outstanding Bonds. The University is seeking approval from the Board to refund up to \$100.0 million for all or any portion of the outstanding bonds issued by the Board on behalf of the University pursuant to certain parameters therein (including net present value savings of at least three percent). Such bonds may be issued in one or more series and combined with any other series of general revenue bonds, and issued from time to time and at any time within the 18 months following the adoption of this Resolution.

The Board approved a similar refunding authorization in its May 2021 meeting and such authorization expires November 18, 2022.

Given current interest rates in today’s municipal market, the University is seeking feedback and information from members of its Underwriting Pool relating to savings refunding opportunities that may exist among outstanding Bonds and which the University should strongly consider as part of its proposed General Revenue Bond issue.

Please feel free to call me should you or others have questions about the details of this funding request.

Sincerely,

A handwritten signature in blue ink, appearing to read "Cathy Anderson".

Cathy Anderson
Chief Financial Officer

cc: Taylor Randall, President
Michael Good, Senior Vice President
Martell Teasley, Senior Vice President
Robert Muir, Associate Vice President
Juliette Tennert, Utah System of Higher Education
Malin Francis, Utah System of Higher Education
Randy Larsen, Gilmore & Bell, P.C.
Brad Patterson, Gilmore & Bell, P.C.
Kelly Murdock, Stifel, Nicolaus & Company

STIFEL

PRELIMINARY FINANCING SUMMARY for

Utah Board of Higher Education \$250,000,000* UNIVERSITY OF UTAH General Revenue and Refunding Bonds Series 2022C

Purpose:	To finance a portion of the costs to construct (a) the Medical Education Building project (the “Med Ed Project”), (b) the Applied Sciences Building project (the “Applied Sciences Project” and together with the Med Ed Project, the “Bonded Projects”) and (c) authorization for refunding all or any portion of outstanding bonds issued by the Board on behalf of the University for up to \$100,000,000 (the “Refunding Authorization”), together with other amounts necessary to pay costs of issuance, pay capitalized interest, and fund a debt service reserve, if necessary.
Not-to-Exceed Par Amount:	\$250,000,000* (Includes costs of issuance and capitalized interest)
Security:	The Series 2022C Bonds will be payable from and secured by a General Revenue pledge which consists of substantially all income and revenues of the University authorized to be pledged, with the exception of (i) legislative appropriations, (ii) tuition and certain fees, and (iii) certain other revenues and income.
Ratings:	‘Aa1’ and ‘AA+’ ratings with a stable outlook <i>are expected</i> by Moody’s Investors Service and S&P Global Ratings, respectively.
Method of Sale:	Negotiated Public Offering
True Interest Cost:	TBD (given current market volatility, a preliminary rate is difficult to determine)

University of Utah Series 2022C Bonds
Preliminary Financing Summary
Page 2 of 2

Underwriters:	TBD
Sale Date:	Current Calendar calls for a mid-November or early December, 2022 sale date, subject to market conditions.
Closing Date:	TBD – Current Calendar calls for settlement in mid-to late December 2022, or early January 2023.
Principal Payment Dates:	August 1 of each year
Interest Payment Dates:	August 1 and February 1, beginning August 1, 2023.
Interest Basis:	30/360
Parameters:	Not-to-Exceed Par for the Projects: \$250,000,000* Not-to-Exceed Term: 35-years from the date of the Bond's issuance. Not-to-Exceed Coupon: 6.00% Not-to-Exceed Discount from Par: 2.00%
Optional Redemption:	May be non-callable or callable (par or make-whole) at the option of the University, as determined at the time of the sale
University Contacts:	Ms. Cathy Anderson, Chief Financial Officer (801-581-6940) Mr. Robert Muir, Associate Vice President – Debt and Asset Management (801-585-5598)
Bond Counsel:	Mr. Brad Patterson, Gilmore & Bell (801-258-2724)
Municipal Advisor:	Mr. Kelly Murdock, Stifel, Nicolaus & Company (385-799-1731)

**Preliminary, subject to change*



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

TAB K

September 16, 2022

Technical Education Tuition Related Policy Revisions

Background

Technical colleges are in the process of transitioning technical education from clock-hours to credit-hours. As part of this transition, the calculation of tuition will also need to be transitioned to a credit-based tuition calculation. To complete this process, several Board finance and facilities policies related to tuition and fees need to be modified to accommodate technical colleges and provide policies consistent with degree-granting institutions.

This work on policies relates to the Board's Strategic Plan priority of System Unification. One of the Board's System Unification strategies is merging system policies, and the related tactic is to review policies to ensure alignment between technical colleges and degree-granting institutions. Another Board strategy for System Unification is to increase the stackability of credentials from technical colleges to degree-granting institutions. The tactic relates to transitioning technical education from clock-hours to credit-hours.

In upcoming Board meetings, technical colleges will bring forward proposals for credit-based tuition as they begin to offer courses based on credit hours.

Policies to Revise to Ensure Applicability to Technical Colleges

The following policy actions are being proposed to ensure policy alignment between technical colleges and degree-granting institutions and to prepare for technical colleges to offer courses based on credit hours in accordance with the Board of Higher Education's strategic objective of System Unification.

Below is a summary of the proposed policy changes being recommended at this time:

R510, Tuition: Addresses tuition at technical colleges. Incorporates policy provisions from tech policies 204 and 205 related to the statutory requirement for no tuition for secondary students and low-cost tuition for post-secondary students.

R511, Tuition Disclosures and Consultation: Provides tuition disclosures for short enrollment periods of less than a semester, as found in technical education. Provides that general student fees should not be charged to students at technical colleges.

R512, *Determination of Resident Status*: Extends the provision that technical colleges are not required to determine residency status to credit-based courses at technical colleges.

R514, *Refunds of Tuition, Fees and Other Student Charges*: Addresses refunds for short enrollment periods, as found in technical education.

R516, *General Student Fees*: Provides that general student fees should not be charged to students at technical colleges.

R517, *Course and Program Fees*: Eliminates policy exceptions for technical colleges. With this revision, the policy provisions related to course and program fees will be fully applicable to technical colleges. The policy clause stating that course fees shall not be used to pay instructional services rendered by faculty and staff will apply to technical colleges and degree-granting institutions. Additionally, a provision that was formerly found in tech policy 204, has been added to R517. This provision allows technical colleges to waive fees for secondary students who qualify for fee waivers at the high school.

Technical College Policy to Rescind

204, *Tuition and Fees*, With the proposed revisions to policy R510, *Tuition*, a separate tuition policy for technical colleges is no longer necessary.

These proposed policy actions have been reviewed by finance officers of both degree-granting institutions and technical colleges at a meeting on August 5, 2022. They were presented as an informational item to the Technical Education Committee on August 19. At its September meeting, the Finance and Facilities Committee considered the recommended policy edits and rescissions.

Commissioner's Recommendation

The Commissioner recommends the following actions:

- All listed policy changes be considered and approved.
- Rescind Technical College policy 204.
- Policy provisions new to technical colleges are to have an effective date which is the earlier of when a course is offered for-credit, or July 1, 2023.

Attachments

R510, Tuition¹

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 [20 USC § 1091b](#), Institutional Refunds
- 2.3 [Board Policy R511](#), Tuition Disclosures and Consultation

R510-3 Definitions

3.1 “Degree-granting Institution” means an institution of higher education described in [Utah Code section 53-B-1-102\(1\)\(a\)](#).

3.2 “Secondary Student” means a student who:

3.2.1 [Is currently enrolled in grades 7-12 in a Utah public or private school, or who is eligible to enroll under Utah Administrative Code R277-419;](#)

3.2.2 [Regardless of age, has not previously been conferred a high school diploma, certificate of completion, adult education secondary diploma, high school equivalency diploma, or a secondary school completion credential for home school; or](#)

3.2.3 [Is no more than 18 years old on or before September 1 of the fiscal year in which they enrolled at the college;](#)

3.2.4 [Is a retained senior who was enrolled in less than grade 12 during the previous year and is not more than 19 years old on or before September 1 of the fiscal year in which they enrolled at the college; or](#)

¹ 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, May 16, 2014, ~~and~~ November 16, 2018, [and XXX](#).

[3.2.5 Meets the definition of a child with a disability under Utah Code section 53E-7-201\(1\) and is no more than 21 years old on or before September 1 of the fiscal year in which they enrolled at the college. For a student turning 22 years old after September 1 but prior to December 31, their classification as a secondary student shall extend to the beginning of the college's winter holiday. For a student turning 22 after December 31, their classification as a secondary student shall extend to the end of the fiscal year.](#)

[3.3 “Technical College” means an institution of higher education described in Utah Code section 53B-1-102\(1\)\(b\). Technical college also means a degree-granting institution with a technical college role.](#)

R510-4 Setting Tuition

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

34.2 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 Higher Education for review and action. [-Degree-granting institutions should also consult with student body leadership.](#) -Presidents who wish to adjust their institution's tuition rate must submit a formal proposal to the Board of Higher Education that includes the following:

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

34.2.2 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;

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

34.2.4 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;

34.2.5 Documentation which shows support from the Board of Trustees; and

34.2.6 Documentation which shows students were advised of proposed tuition rates through Truth-in-tuition Hearings and [at degree-granting institutions](#), Student Body Leadership Councils.

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

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

34.5 Tuition changes approved by the Board [for degree-granting institutions](#) take effect for the subsequent semester. [Tuition changes approved by the Board for technical colleges take effect for course work or enrollment periods that begin on or after July 1 of the fiscal year for which the rates are approved. The Board may designate a different effective date when deemed appropriate.](#)

R510.45 Annual Review

45.1 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.

45.2 Under the direction of the Board 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 Higher Education at the end of the associated fiscal year.

R510.56 Tuition Cost Ratios [at Degree-granting Institutions](#)

56.1 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.

56.2 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.

R510.67 Authorized Tuition Models

67.1 [Degree-granting i](#)nstitutions may use either one of the following tuition models:

67.1.1 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.

67.1.2 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.

[7.2 Technical colleges will use the linear tuition model described in subsection 6.1.1.](#)

R510.7.8 Other Tuition Charges

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

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

7.8.3 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:

7.8.3.1 The student and workforce demand for the program;

7.8.3.2 The impact of differential tuition rates on student access and retention;

7.8.3.3 The tuition rates of comparable programs at other institutions; and

7.8.3.4 The potential earnings capacity of program graduates.

7.8.4 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.~~

8.5 Technical College Tuition

8.5.1 —No Tuition for Secondary Students at Technical Colleges

8.5.1.1 As prescribed in Utah Code section 53B-2a-106(1)(b)(ii), a secondary student who is formally scheduled in an approved course or program at a technical college shall not be charged tuition.

8.5.1.2 A secondary student shall not be charged tuition at a USHE technical college regardless of the day or time of the course or program. A student who is not a secondary student shall be considered a postsecondary student and shall be charged the institution's regular tuition rate. A student whose secondary status changes while enrolled in a defined-length course or program shall be allowed to complete the course or program without paying tuition.

8.5.1.3 A referral of a student by a public, private, or home school high school shall be sufficient documentation of secondary student status for tuition purposes.

8.5.2 Postsecondary Tuition at Technical Colleges. Technical colleges shall assess low-cost tuition to postsecondary students as prescribed in Utah Code section 53B-2a-106(1)(b)(i) and as approved by the Board of Higher Education.

8.7.6 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.

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

8.7.8 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.

87.9 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.

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

78.11 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.

78.12 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 Higher Education authorized tuition reductions.

R510, Tuition¹

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 [20 USC § 1091b](#), Institutional Refunds
- 2.3 [Board Policy R511](#), Tuition Disclosures and Consultation

R510-3 Definitions

3.1 "Degree-granting Institution" means an institution of higher education described in Utah Code section 53-B-1-102(1)(a).

3.2 "Secondary Student" means a student who:

3.2.1 Is currently enrolled in grades 7-12 in a Utah public or private school, or who is eligible to enroll under Utah Administrative Code R277-419;

3.2.2 Regardless of age, has not previously been conferred a high school diploma, certificate of completion, adult education secondary diploma, high school equivalency diploma, or a secondary school completion credential for home school; or

3.2.3 Is no more than 18 years old on or before September 1 of the fiscal year in which they enrolled at the college;

3.2.4 Is a retained senior who was enrolled in less than grade 12 during the previous year and is not more than 19 years old on or before September 1 of the fiscal year in which they enrolled at the college; or

¹ *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, May 16, 2014, November 16, 2018, and XXX.*

3.2.5 Meets the definition of a child with a disability under Utah Code section 53E-7-201(1) and is no more than 21 years old on or before September 1 of the fiscal year in which they enrolled at the college. For a student turning 22 years old after September 1 but prior to December 31, their classification as a secondary student shall extend to the beginning of the college's winter holiday. For a student turning 22 after December 31, their classification as a secondary student shall extend to the end of the fiscal year.

3.3 “Technical College” means an institution of higher education described in Utah Code section 53B-1-102(1)(b). Technical college also means a degree-granting institution with a technical college role.

R510-4 Setting Tuition

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

4.2 The president of each USHE institution, in consultation with their Board of Trustees, may recommend institutional tuition rate adjustments to the Board of Higher Education for review and action. Degree-granting institutions should also consult with student body leadership. Presidents who wish to adjust their institution's tuition rate must submit a formal proposal to the Board of Higher Education that includes the following:

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

4.2.2 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;

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

4.2.4 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;

4.2.5 Documentation which shows support from the Board of Trustees; and

4.2.6 Documentation which shows students were advised of proposed tuition rates through Truth-in-tuition Hearings and, at degree-granting institutions, Student Body Leadership Councils.

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

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

4.5 Tuition changes approved by the Board for degree-granting institutions take effect for the subsequent semester. Tuition changes approved by the Board for technical colleges take effect for course work or enrollment periods that begin on or after July 1 of the fiscal year for which the rates are approved. The Board may designate a different effective date when deemed appropriate.

R510.5 Annual Review

5.1 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.

5.2 Under the direction of the Board 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 Higher Education at the end of the associated fiscal year.

R510.6 Tuition Cost Ratios at Degree-granting Institutions

6.1 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.

6.2 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.

R510.7 Authorized Tuition Models

7.1 Degree-granting institutions may use either one of the following tuition models:

7.1.1 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.

7.1.2 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.

7.2 Technical colleges will use the linear tuition model described in subsection 6.1.1.

R510.8 Other Tuition Charges

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

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

8.3 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:

8.3.1 The student and workforce demand for the program;

8.3.2 The impact of differential tuition rates on student access and retention;

8.3.3 The tuition rates of comparable programs at other institutions; and

8.3.4 The potential earnings capacity of program graduates.

8.4 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.

8.5 Technical College Tuition

8.5.1 No Tuition for Secondary Students at Technical Colleges

8.5.1.1 As prescribed in Utah Code section 53B-2a-106(1)(b)(ii), a secondary student who is formally scheduled in an approved course or program at a technical college shall not be charged tuition.

8.5.1.2 A secondary student shall not be charged tuition at a USHE technical college regardless of the day or time of the course or program. A student who is not a secondary student shall be considered a postsecondary student and shall be charged the institution's regular tuition rate. A student whose secondary status changes while enrolled in a defined-length course or program shall be allowed to complete the course or program without paying tuition.

8.5.1.3 A referral of a student by a public, private, or home school high school shall be sufficient documentation of secondary student status for tuition purposes.

8.5.2 Postsecondary Tuition at Technical Colleges. Technical colleges shall assess low-cost tuition to postsecondary students as prescribed in Utah Code section 53B-2a-106(1)(b)(i) and as approved by the Board of Higher Education.

8.6 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.

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

8.8 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.

8.9 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.

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

8.11 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.

8.12 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 Higher Education authorized tuition reductions.

R511, Tuition Disclosures and Consultation¹

R511-1 Purpose: To establish procedures (1) for institutions to consult with students prior to recommending tuition increases to the Board, (2) for the Board to consult with students prior to adopting projected tuition increases as part of the budget process, (3) for the Board to consult with students prior to approving increases of the tuition to be charged to the students at the institutions, and (4) for institutions to disclose to students the full cost of instruction and the amount of that cost that is covered by tuition.

R511-2 References

- 2.1 [Utah Code § 53B-7-101, Tuition Recommendations](#)
- 2.2 [Utah Code § 53B-7-101.5, Proposed Tuition Increases, Notice, Hearings](#)
- 2.3 [Utah Code § 53B-7-105, Higher Education Cost Disclosure](#)
- 2.4 [Board Policy R510, Tuition and Fees](#)

R511-3 Definitions

3.1 **“Full Cost of Instruction”** ~~is~~ ~~A~~ ~~as~~ derived from a calculation that allocates functional overhead expenditure categories to instruction, excluding the amount spent directly on research and public service or the overhead allocated to research and public service. Overhead categories defined by the National Association of College and University Business Officers include student services, institutional support, physical plant operation and maintenance, and academic support. Full cost of instruction is reported in the USHE Data Book for the most recently completed year.

3.2 **“Tuition”** ~~means~~ Board-approved amounts ~~for~~ ~~charged to~~ a full-time undergraduate student ~~under Board Policy (R510)~~.

3.3 **“General Student Fees”** ~~—~~ ~~means~~ Board approved amounts which are assessed to students directly, required to be paid with tuition, and are generally dedicated to specific purposes, such as building revenue bonds, extracurricular student activities, additional student services such as health clinics or computer labs, or athletics, ~~(See Board Policy R510)~~. Fees for specific courses are not included. ~~Technical colleges are not authorized to charge general student fees.~~

3.4 **“Technical College”** ~~means an institution of higher education described in Utah Code section 53B-1-102(1)(b).~~

¹ *Approved February 16, 2001, amended June 4, 2004, ~~and XXX.~~*

R511-4 Disclosures for Tuition Increases – “Truth in Tuition”

4.1 Institutional Consultation with Students: Prior to recommending a tuition increase to the Board of Higher Education, the President or ~~his or her~~[their](#) designee shall hold a public meeting to provide an explanation that is consistent with the format prescribed by Utah Code [section 53B-7-101.5.\(4\)](#) of the reasons for the proposed increase, how the revenue generated by the increase will be used, and an opportunity for public comment from students. ~~After consultation with student leaders, public~~ [Public](#) notice of the time, place, and purpose of the public meeting shall be provided through an advertisement in the student newspaper or by other forms of written notification at least two times within the ~~ten~~[10](#)-day period prior to the meeting date, consistent with the standards prescribed in Utah Code [section 53B-7-101.5. \(2\) and \(3\).](#) ~~For degree-granting institutions, the public notice shall follow consultation with student leaders.~~

4.1.1 Tuition Percentage: ~~Institutions shall disclose the aggregate percentage increase of first and second tier tuition (Board Policy R510.3.1 and 3.2) and the dollar increase per semester~~ [or enrollment period](#).

4.2 Board of Higher Education Consultation with Students: The Board of Higher Education, prior to adopting projected tuition increases as part of the budget process or prior to approving any increase in tuition, shall hold a public hearing as part of a regularly scheduled meeting of the Board. In the hearing the Board shall provide an explanation of the reasons for the proposed increase, an explanation of how the revenue generated by the increase will be used, and an opportunity for public comment from students. The Board shall provide written notice of the hearing to the members of the Utah Council of Student-body Presidents at least one week prior to the date of the hearing.

R511-5 Disclosure of Tuition and Higher Education Costs

5.1 Disclosure of Tuition Relative to Full Cost of Instruction: ~~Consistent with Utah Code section 53B-7- 105, each institution shall disclose to its undergraduate resident students at the time of registration, in dollar figures for a full-time equivalent student (a) the full cost of instruction, (b) the amount collected from student tuition and fees, and (c) the difference between the amounts for the full cost of instruction and the student tuition and fees, noting that the difference between the cost and tuition was paid by state tax funds and other monies.~~

5.2 Amounts Based on One Semester/[Enrollment Period](#) for the Current Year: ~~The amounts for full-time equivalent student tuition and general student fees and estimated full~~ ~~costs of instruction should be based on 15 credit hours for one semester for the current academic year~~ [at a degree-granting institution or full-time for an enrollment period at a technical](#)

[college.](#) Tuition and fee amounts which support the full cost of instruction, prior to any reductions for statutory tuition waivers ([Board Policy R513](#)) or employee tuition remissions ([Board Policy R824](#)), shall be used.

5.3 Content of Cost Disclosure:— Amounts for the full cost of instruction shall be estimated by the Office of the Commissioner of Higher Education in consultation with the institutions, relying on existing USHE cost study reporting practices. The content of the disclosure shall be in a statement with essentially the same content as the following:

Full-time undergraduate resident students at [Institution Name] paying a [semester/[weekly enrollment period](#)] tuition and fee amount of [tuition dollar amount] (before any financial aid, scholarships, or waivers) contribute an estimated [percentage] percent to the full cost of instruction per full-time student of [full cost dollar amount]. The remaining support for the full cost of instruction is provided by [tax funds dollar amount] of state tax funds and [other funds dollar amount] of other institutional revenue sources.

5.4 Method of Cost Disclosure:— Institutions may choose to disclose this information through a variety of methods, so long as the information is disclosed plainly and is readily available for students and other constituencies. These methods may include disclosure through (1) the course catalog, (2) the course schedule, (3) tuition invoices, (4) tuition receipts, (5) the cashier's office window, or (6) other Internet and printed materials that list tuition schedules, tuition payment procedures and timelines, or other registration and tuition -related information.

R511, Tuition Disclosures and Consultation¹

R511-1 Purpose: To establish procedures (1) for institutions to consult with students prior to recommending tuition increases to the Board, (2) for the Board to consult with students prior to adopting projected tuition increases as part of the budget process, (3) for the Board to consult with students prior to approving increases of the tuition to be charged to the students at the institutions, and (4) for institutions to disclose to students the full cost of instruction and the amount of that cost that is covered by tuition.

R511-2 References

- 2.1 [Utah Code § 53B-7-101](#), Tuition Recommendations
- 2.2 [Utah Code § 53B-7-101.5](#), Proposed Tuition Increases, Notice, Hearings
- 2.3 [Utah Code § 53B-7-105](#), Higher Education Cost Disclosure
- 2.4 [Board Policy R510](#), Tuition and Fees

R511-3 Definitions

3.1 “Full Cost of Instruction” is as derived from a calculation that allocates functional overhead expenditure categories to instruction, excluding the amount spent directly on research and public service or the overhead allocated to research and public service. Overhead categories defined by the National Association of College and University Business Officers include student services, institutional support, physical plant operation and maintenance, and academic support. Full cost of instruction is reported in the USHE Data Book for the most recently completed year.

3.2 “Tuition” means Board-approved amounts charged to a full-time undergraduate student under Board Policy R510.

3.3 “General Student Fees” means Board approved amounts which are assessed to students directly, required to be paid with tuition, and are generally dedicated to specific purposes, such as building revenue bonds, extracurricular student activities, additional student services such as health clinics or computer labs, or athletics. (See Board Policy R510. Fees for specific courses are not included. Technical colleges are not authorized to charge general student fees.

3.4 “Technical College” means an institution of higher education described in Utah Code section 53B-1-102(1)(b).

¹ *Approved February 16, 2001, amended June 4, 2004, and XXX.*

R511-4 Disclosures for Tuition Increases – “Truth in Tuition”

4.1 Institutional Consultation with Students: Prior to recommending a tuition increase to the Board of Higher Education, the President or their designee shall hold a public meeting to provide an explanation that is consistent with the format prescribed by Utah Code section 53B-7-101.5.(4) of the reasons for the proposed increase, how the revenue generated by the increase will be used, and an opportunity for public comment from students. Public notice of the time, place, and purpose of the public meeting shall be provided through an advertisement in the student newspaper or by other forms of written notification at least two times within the 10-day period prior to the meeting date, consistent with the standards prescribed in Utah Code section 53B-7-101.5. (2) and (3). For degree-granting institutions, the public notice shall follow consultation with student leaders.

4.1.1 Tuition Percentage: Institutions shall disclose the aggregate percentage increase and the dollar increase per semester or enrollment period.

4.2 Board of Higher Education Consultation with Students: The Board of Higher Education, prior to adopting projected tuition increases as part of the budget process or prior to approving any increase in tuition, shall hold a public hearing as part of a regularly scheduled meeting of the Board. In the hearing the Board shall provide an explanation of the reasons for the proposed increase, an explanation of how the revenue generated by the increase will be used, and an opportunity for public comment from students. The Board shall provide written notice of the hearing to the members of the Utah Council of Student-body Presidents at least one week prior to the date of the hearing.

R511-5 Disclosure of Tuition and Higher Education Costs

5.1 Disclosure of Tuition Relative to Full Cost of Instruction: Consistent with Utah Code section 53B-7-105, each institution shall disclose to its undergraduate resident students at the time of registration, in dollar figures for a full-time equivalent student (a) the full cost of instruction, (b) the amount collected from student tuition and fees, and (c) the difference between the amounts for the full cost of instruction and the student tuition and fees, noting that the difference between the cost and tuition was paid by state tax funds and other monies.

5.2 Amounts Based on One Semester/Enrollment Period for the Current Year: The amounts for full-time equivalent student tuition and general student fees and estimated full costs of instruction should be based on 15 credit hours for one semester for the current academic year at a degree-granting institution or full-time for an enrollment period at a technical college. Tuition and fee amounts which support the full cost of instruction, prior to any reductions for statutory tuition waivers (Board Policy R513) or employee tuition remissions (Board Policy R824), shall be used.

5.3 Content of Cost Disclosure: Amounts for the full cost of instruction shall be estimated by the Office of the Commissioner of Higher Education in consultation with the institutions, relying on existing USHE cost study reporting practices. The content of the disclosure shall be in a statement with essentially the same content as the following:

Full-time undergraduate resident students at [Institution Name] paying a [semester/enrollment period] tuition and fee amount of [tuition dollar amount] (before any financial aid, scholarships, or waivers) contribute an estimated [percentage] percent to the full cost of instruction per full-time student of [full cost dollar amount]. The remaining support for the full cost of instruction is provided by [tax funds dollar amount] of state tax funds and [other funds dollar amount] of other institutional revenue sources.

5.4 Method of Cost Disclosure: Institutions may choose to disclose this information through a variety of methods, so long as the information is disclosed plainly and is readily available for students and other constituencies. These methods may include disclosure through (1) the course catalog, (2) the course schedule, (3) tuition invoices, (4) tuition receipts, (5) the cashier's office window, or (6) other Internet and printed materials that list tuition schedules, tuition payment procedures and timelines, or other registration and tuition -related information.

R512, Determination of Resident Status¹

R512-1 Purpose: To define “resident” student for purposes of tuition in the Utah System of Higher Education (“USHE”).

R512-2 References

- 2.1 [Utah Code §Ann. 53B-8-102](#), Definition of Resident Student
- ~~2.2 Utah Code Ann. 23-13-2, Definition of Domicile~~
- ~~2.3 Utah Code Ann. 31A-29-103, Definition of Domicile~~
- 2.34 [Utah Code §Ann. 41-1a-202](#), Definition of Domicile
- 2.45 [Utah Code Title 53B, Chapter 8, Part 1 Ann. 53B-8-101 et seq.](#), Tuition Waivers & Scholarships
- 2.56 [Board Policy and Procedure R510](#), Tuition and Fee Policy
- 2.67 [Board Policy and Procedure R513](#), Tuition Waivers & Reductions

R512-3 Definitions

3.1 “Continuous Utah ~~R~~Residency ~~s~~Status for ~~e~~One ~~f~~Full ~~y~~Year” means the student has resided in Utah for 12 continuous months prior to the term for which resident student status is being sought.

3.2 “Domicile” shall be defined consistent with general Utah law defining domicile, and, for purposes of determining resident student status, shall be determined by the student’s: (1) bodily presence, and (2) concurrent intent to reside permanently in that location.

All persons have a domicile somewhere. A person can have only one domicile. A domicile of choice is a domicile chosen by a person to replace ~~his or her~~[their](#) former domicile. To acquire a domicile of choice in a place, a person must intend to make that place ~~his or her~~[their](#) home for the time at least. A domicile, once established, continues until it is superseded by a new domicile. Also, once established, a domicile is not lost by an absence from it for months or even years, for the purpose of business or the like, if during such absence there exists an intent to resume residence in the place of domicile following the completion of the purpose of the absence.

¹ *Adopted July 22, 1975; amended April 11, 1987, April 17, 1992, May 5, 1995, January 12, 2001, October 19, 2001, July 12, 2002, April 16, 2004, December 9, 2004, April 22, 2005, April 21, 2006, June 8, 2007, May 30, 2008, May 29, 2009, May 20, 2011, May 18, 2012, May 16, 2014, November 14, 2014, May 15, 2015, May 20, 2016, ~~and~~ May 15, 2020, [and XXX](#).*

3.3 “Immediate fFamily mMember” means the spouse or unmarried dependent child of the individual requesting resident student status.

3.4 “Military sServicemember” means an individual who is serving on active duty in the United States Armed Forces within the state of Utah; or an individual who is a member of a reserve component of the United States Armed Forces assigned in Utah; or an individual who is a member of the Utah National Guard; or an individual who maintains domicile in Utah, as described in Ssubsection 6.1.6., but is assigned outside of Utah pursuant to federal permanent change of station orders.

3.5 “Military vVeteran” means an individual who:

3.5.1 hHas served on active duty:

3.5.1.1 iIn the United State Armed Forces for at least 180 consecutive days or was a member of a reserve component and has been separated or retired with an honorable or general discharge; or

3.5.1.2 iIn the National Guard and has been separated or retired with an honorable or general discharge; or

3.5.1.3 iIncurred an actual service related injury or disability in the line of duty regardless of whether that person completed 180 days of active duty.

3.6 “Parent” means the biological or adoptive parent of the student, regardless of whether the parent has legal custody of the student or whether the parent claims the student as a dependent.

3.7 “Eligible pPerson” means an individual entitled to benefits under Title 38 U. S. Code Veterans’ Benefits.

3.8 “Preponderance of the eEvidence” means the existence of a fact is more probable than its nonexistence.

3.9 “Resident sStudent sStatus” means the condition of being a resident student for tuition purposes.

3.10 “Substantial eEvidence” means evidence that is more than a mere preponderance and is definite, clear, and convincing.

3.11 “Utah rResidency” means residing in Utah.

3.12 “USHE Institution” means an institution within [the Utah’s System of Higher Education](#).

R512-4 Resident Student Status

4.1 Establishing Resident Student Status: A student will be granted resident student status after ~~he or she~~[they](#):

4.1.1 ~~H~~[H](#)~~has~~[has](#) acquired domicile in Utah; or

4.1.2 ~~H~~[H](#)~~has~~[has](#) satisfied one or more of the exceptions set forth in this policy.

4.2 Policies for Determining Resident Student Status:

4.2.1 Policies for Students Enrolled in Credit-Bearing Degree Programs: Each institution shall have the responsibility of determining resident student status according to the requirements of Utah Code [section Ann. §53B-8-102](#) and this policy. Each institution may, at its discretion, and at the recommendation of the president, implement its own policy regarding the criteria for resident student status for either undergraduate students or graduate students, or both, in credit-bearing degree programs, that deviates from the criteria set forth in this policy, provided the criteria implemented by the institution is ~~more~~[stricter](#).

4.2.2 Policies for Students Enrolled in Non-Credit Programs: Because most non-credit ~~applied technology~~ programs are short-term (require less than a year to complete), USHE institutions offering non-credit courses or programs may, at their discretion, implement a policy that does not require residency classification for students enrolled in non-credit courses or programs.

4.2.3. Policies for Students Enrolled at Technical Colleges: Because most technical education is short-term (requires less than a year to complete), USHE technical colleges, and degree-granting institutions with a technical college role, may, at their discretion, implement a policy that does not require students enrolled in technical education courses or programs to establish residency.

4.2.43 Exception to Establishing Resident Student Status: Each institution may, at its discretion, and at the recommendation of the president, implement its own policy regarding the criteria for resident student status for either undergraduate students or graduate students, or both, in credit-bearing degree programs, that deviates from the criteria set forth in this policy. Such a policy shall not be more lenient than requiring a one-year waiting period as set forth here in [subsection 5.1](#).

4.3 Rebuttable Presumption: A student who has not previously acquired domicile in Utah and who enrolls at a USHE institution prior to residing in Utah for 12 continuous months will be presumed to not be domiciled in Utah and, therefore, will be classified as a nonresident student for tuition purposes. This presumption may be rebutted by substantial evidence.

4.4 International Students:

4.4.1 Classification of International Students Who are in United States on Nonimmigrant Visas: Students who are aliens and who are present in the United States on visitor, student, or other visas which authorize only temporary presence in this country, do not have the capacity to intend to reside in Utah for an indefinite period and therefore must be classified as nonresident

4.4.2 Classification of International Students Who are in United States on Immigrant Visas: Students who are aliens and who have been granted immigrant or permanent resident status in the U.S. shall be classified for purposes of resident status according to the same criteria applicable to citizens.

4.4.3 International Students Who Have Obtained Asylum or Refugee Status: An international student who has obtained asylum or refugee status under U.S. immigration law shall be classified for purposes of resident status according to the same criteria applicable to citizens.

4.5 Marriage to Utah Resident: A person who marries a Utah resident is eligible to be granted resident student status after ~~he or she~~[they](#) ~~have~~[has](#) acquired domicile in Utah.

4.6 Burden of Proof: The burden is on the student to prove that ~~he or she~~[they](#) ~~are~~[is](#) eligible for resident student status prior to the first day of classes for the term the student seeks to attend as a resident student. Except as set forth in [subsection 4.3](#) of this policy, the standard for establishing resident student status is by a preponderance of the evidence. The institution, through its registrar, or designated person, is authorized to require written documents, affidavits, verifications, or other evidence deemed necessary to determine why a student is in Utah. The institution shall review all relevant evidence that is submitted by the student and shall make the residency determination based on the totality of the circumstances. The evidence

submitted by the student shall include the evidence that is specifically required by the applicable section of this policy. In addition, a student may be required to file any or all of the following evidence within applicable timelines established by the institution.

4.6.1 A statement from the student describing employment and expected sources of support;

4.6.2 A statement from the student's employer;

4.6.3 Supporting statements from persons who might be familiar with the family situation;

4.6.4 Birth certificate;

4.6.5 Marriage certificate;

4.6.6 Documentation of eligibility for state social or rehabilitation services;

4.6.7 Documentation of immigration status and placement as political refugee;

4.6.8 Indicia of Utah domicile, including Utah voter registration, Utah vehicle registration, Utah driver's license or identification card, Utah state income tax return, rental contract or mortgage documents, bank records, and utility bills.

4.7 Receipt of State Social Services Benefits: A person who has been determined by a Utah governmental social or rehabilitation services agency to be a Utah resident for purposes of receiving state aid to attend a USHE institution is immediately eligible to apply for resident student status. The state aid must, at a minimum, cover the full cost of resident tuition. Upon the termination of such government agency support, the person is governed by the standards applicable to other persons. Any time spent residing in Utah during the time the individual received government aid shall count towards any applicable waiting period for Utah residency for tuition purposes upon termination of the government aid.

4.8 Reciprocity: The determination to grant residency to a student at a USHE institution shall be honored at other USHE institutions, unless:

4.8.1 the student obtained resident student status under false pretenses, or

4.8.2 the facts existing at the time of the granting of resident student status have significantly changed.

4.9 Reclassification by the Institution: If a student is classified as a resident, or granted residency by a USHE institution, the USHE institution may initiate a reclassification inquiry and in fact reclassify the student, based on any facts, error, or changes in facts or status which would justify such an inquiry, even if the error was on the part of the USHE institution.

4.10 Procedures for Determining Resident Student Status: If a student desires to be granted resident student status, ~~he or she~~[they](#) must comply with the following procedures:

4.10.1 Application Deadline: Students must meet institutional application deadlines for each term. Institutions may establish a policy regarding acceptance of late residency applications for current term consideration. Unless institutional policy allows otherwise, institutions may not accept applications for resident student status or supporting documentation after the third week of the semester or term for which the student seeks resident student status. Ordinarily applications or supporting documentation received after the third week should be considered for the following semester.

4.10.2 Initial Classification: Each institution shall initially classify all applicants as either resident or nonresident. If there is doubt concerning resident status, the applicant shall be classified as a nonresident.

4.10.3 Application for Reclassification: Every student classified as a nonresident shall retain that status until ~~he or she~~[they are](#) officially reclassified ~~to resident status~~[as a resident](#).

4.10.4 Refund: A decision favorable to the applicant shall be retroactive to the beginning of the academic period for which application for resident status was made and shall require a refund of the nonresident portion of any tuition charges paid for that and subsequent academic periods.

4.10.5 Hearings: Each institution shall be responsible for providing a process for students who have been denied resident student status to be heard. Each institution shall adopt procedures that fit the local campus situation, but the following guidelines shall be followed:

4.10.5.1 Procedures for a hearing shall be set out in writing by the institution, subject to approval by the Office of the Commissioner.

4.10.5.2 The institution shall provide a hearing officer or hearing committee with appropriate clerical and other services as necessary to the effective function of the hearing process.

4.10.5.3 The student appealing the decision shall have the responsibility of providing evidence that proves that ~~he or she~~ they ~~have~~ has met the residency requirements. Students shall be given copies of the Board's policies pertaining to determination of residency. The student shall also be given an explanation of the rationale of the decision-maker who previously ruled that the student was classified as a nonresident.

4.10.5.4 Both the student and the administration's representative are entitled to representation by counsel.

4.10.5.5 Oral and written evidence may be presented. It is not required that a formal, written, verbatim record of the proceedings be kept, but a written summary of the significant assertions and findings of the hearing shall be prepared.

4.10.5.6 It is not required that formal rules of evidence be followed; administrative hearing rules may be used.

4.10.5.7 Decisions of the hearing officer or hearing committee must be in writing and must give reasons for the decision.

4.11 Declaration of Financial Independence: In addition to submitting objective evidence of domicile, a person seeking resident student status must also submit a declaration of financial independence, which must include, at a minimum, evidence that the person is not claimed as a dependent on the most recently filed federal tax returns of any person who is not a resident of Utah. Institutional residency officers shall require such documentation at the time of initial application for resident student status.

4.12 Penalties for Giving Incorrect or Misleading Information: A student who gives incorrect or misleading information to evade payment of nonresident fees shall be subject to serious disciplinary action and must also pay the applicable nonresident fees for each term previously attended.

4.13 Waivers of Nonresident Tuition—Nonresident Students Exempt from Nonresident Portion of Tuition: The following students who attend a USHE institution may receive a waiver of nonresident tuition under Board Policy R513; however, these students may not use time spent in Utah as a student on any of these programs toward any waiting period that may be required for resident tuition status. For more information on all tuition waivers, please see Board Policy R513.

4.13.1 Western Undergraduate Exchange (WUE) Students: A student attending a USHE institution under the Western Undergraduate Exchange program is considered to be domiciled in [his/her/their](#) home state. (See Board Policy R513-8 for further details regarding WUE.)

4.13.2 Western Regional Graduate Program (WRGP): A student attending a USHE institution under the Western Regional Graduate Program is considered to be domiciled in [his/her/their](#) home state.

4.13.3 Professional Student Exchange Program/WICHE Students: A student attending a USHE institution under the Professional Student Exchange Program/WICHE Program is considered to be domiciled in [his/her/their](#) home state. (See Board Policy R513-8 for further details regarding WICHE.)

4.13.4 Exemption for Alumni Legacy Scholarships: The students attending a USHE institution under this scholarship are considered to be domiciled in [his/her/their](#) home state. (See Board Policy R513-17 for further details regarding Alumni Legacy Scholarships.)

4.13.5 ~~Dixie State~~ Utah Tech University's Good Neighbor Students: The students attending ~~DSU~~ [Utah Tech University](#) under this scholarship are considered to be domiciled in [his/her/their](#) home state. (See Board Policy R513-4.2. for further details regarding Good Neighbor Students.)

R512.5 “Student Who Has Come to Utah For the Purpose of Attending an Institution of Higher Education” Exception to Establishing Resident Student Status

5.1 General Rule: A student who has come to Utah for the purpose of attending an institution of higher education may be granted resident student status if, prior to the first day of classes of the term the student seeks to attend as a resident student, the student has:

5.1.1 maintained continuous Utah residency status for one full year;

5.1.2 submitted a written declaration that the student has relinquished residency in any other state;

5.1.3 submitted objective evidence that the student has taken overt steps to establish permanent residency in Utah and that the student does not maintain a residence elsewhere; and

5.1.4 submitted a declaration of financial independence to include documentation that the student is not claimed as a dependent on the tax returns of any person who is not a resident of Utah (see [subsection 4.12](#) above)

5.2 Evidence Required: Students applying for resident student status under this section are expected to submit as much objective evidence as possible, including, but not limited to, providing evidence of, or explanation of the lack of evidence of, each of the following:

5.2.1 A Utah high school transcript issued in the past year confirming attendance at a Utah high school in the previous 12 months;

5.2.2 A Utah voter registration dated a reasonable period (generally meaning within the past 90 days) prior to the first day of class of the term for which the student is seeking resident status;

5.2.3 A Utah driver license or identification card with an original date of issue or renewal date several months prior to the first day of class of the term for which the student is seeking resident status;

5.2.4 A Utah vehicle registration dated a reasonable period (generally meaning within the past 90 days) prior to the first day of class of the term for which the student is seeking resident status;

5.2.5 Evidence of employment in Utah for a reasonable period (generally meaning within the past 90 days) prior to the first day of class of the term for which the student is seeking resident status;

5.2.6 Proof of payment of Utah resident income tax for the previous year;

5.2.7 A rental agreement or mortgage document showing the student's name and Utah address for at least 12 months prior to the first day of class of the term for which the student is seeking resident status; and

5.2.8 Utility bills showing the student's name and Utah address for at least 12 months prior to the first day of class of the term for which the student is seeking resident status resident student status.

5.3 Absence from sState: A student will not jeopardize ~~his or her~~[their](#) status under this section solely by absence from the state for a period of less than 30 total days during the 12-month period. See *Frame v. Residency Appeals Committee*, 675 P2d. 1157 (Utah 1983). If a

student leaves the state for the purpose of satisfying the requirements for institutional internships, institutional courses, study abroad programs, or athletic training, required by the institution the student will not be deemed to be absent from the state for purposes of this section for the period of time that ~~he or she~~they can establish that these purposes were being met. Once a student has been granted resident student status, any future absence from the state will not negatively affect ~~his or her~~their resident student status.

Example: A student who comes to a Utah school on an athletic scholarship and who, during ~~his or her~~their first 12 months in Utah, is required to attend a training camp out of state, will be able to count the time out of state at the training camp as part of the 12-month waiting period that is requisite to being granted resident tuition status.

Example: After being granted resident student status, a student may be absent from the state for purposes such as temporary employment, education, religious, charitable, or military service and continue to be considered a resident for tuition purposes provided ~~he or she~~they have not taken action to establish domicile elsewhere during ~~his or her~~their absence from Utah.

R512.6 “Military Service” Exception to Establishing Resident Student Status.

6.1 A USHE institution shall grant resident student status for tuition purposes to:

6.1.1 ~~a~~A military servicemember, if the military servicemember provides:

6.1.1.1 the military servicemember’s current United States military identification card; and

6.1.1.2 a statement from the military servicemember’s current commander, or equivalent, stating that the military servicemember is assigned to Utah; or

6.1.1.3 evidence that the military servicemember is domiciled in Utah, as described in ~~S~~subsection 6.1.6

6.1.2 ~~a~~A military servicemember’s immediate family member, if the military servicemember’s immediate family member provides:

6.1.2.1 the military servicemember’s current United States military identification card or the immediate family member’s current United States military identification card; and

6.1.2.2 a statement from the military servicemember’s current commander, or equivalent, stating that the military servicemember is assigned in Utah; or

6.1.2.3 the military servicemember’s current United States military identification card or the immediate family member’s current United States military identification card, and evidence that the military servicemember is domiciled in Utah, as described in [S](#)ubsection 6.1.6.

6.1.3 [A](#) military veteran, regardless of whether the military veteran served in Utah, if the military veteran provides:

6.1.3.1 evidence of an honorable or general discharge;

6.1.3.2 a signed written declaration that the military veteran has relinquished residency in any other state and does not maintain a residence elsewhere;

6.1.3.3 objective evidence that the military veteran has demonstrated an intent to establish residency in Utah, which may include any one of the following:

6.1.3.3.1 a Utah voter registration card;

6.1.3.3.2 a Utah driver license or identification card;

6.1.3.3.3 a Utah vehicle registration;

6.1.3.3.4 evidence of employment in Utah;

6.1.3.3.5 a rental agreement showing the military veteran’s name and Utah address; or

6.1.3.3.6 utility bills showing the military veteran’s name and Utah address.

6.1.4 [A](#) military veteran’s immediate family member, regardless of whether the military veteran served in Utah, if the military veteran’s immediate family member provides:

6.1.4.1 evidence of the military veteran’s honorable or general discharge;

6.1.4.2 a signed written declaration that the military veteran’s immediate family member has relinquished residency in any other state and does not maintain a residence elsewhere; and

6.1.4.3 objective evidence that the military veteran’s immediate family member has demonstrated an intent to establish residency in Utah which may include any one of the items described in [subsection 6.1.3.3](#). above.

6.1.5 ~~a~~An eligible person who provides:

6.1.5.1 evidence of eligibility under Title 38 U. S. Code Veterans’ Benefits; and

6.1.5.2 a signed written declaration that the eligible person will utilize GI Bill benefits; and

6.1.5.3 objective evidence that the eligible person has demonstrated an intent to establish residency in Utah, which may include any one of the items described in [subsection 6.1.3.3](#). above.

6.1.6 Evidence of domicile as described in [subsections 6.1.1.3 and 6.1.2.3](#) includes:

6.1.6.1 a current Utah voter registration card;

6.1.6.2 a valid Utah driver license or identification card;

6.1.6.3 a current Utah vehicle registration

6.1.6.4 a copy of a Utah income tax return, in the military servicemember’s or military servicemember’s spouse’s name, filed as a resident in accordance with Utah Code [Section 59-10-502](#); or

6.1.6.5 proof that the military servicemember or military servicemember’s spouse owns a home in Utah, including a property tax notice for property owned in Utah.

R512.7 “Membership of an American Indian Tribe” Exception to Establishing Resident Student Status-

7.1 Any American Indian who is enrolled on the tribal rolls of a tribe whose reservation or trust lands lie partly or wholly within Utah or whose border is at any point contiguous with the border of Utah is entitled to be granted resident student status.

7.2 Any American Indian who is a member of a federally recognized or known Utah tribe and has graduated from a Utah high school is entitled to be granted resident student status.

7.3 A list of recognized tribes will be maintained by the Office of the Commissioner of Higher Education and distributed to all campus residency officers.

R512.8 “Job Corps Student” Exception to Establishing Resident Student Status.

8.1 A Job Corps student is entitled to resident student status if the student:

8.1.1 is admitted as a full-time, part-time, or summer school student in a program of study leading to a degree or certificate; and

8.1.2 submits verification that the student is a current Job Corps student.

8.2 Upon termination of the student’s Job Corps enrollment/participation, the student shall be subject to the same residency standards applicable to other persons under this policy. The time spent residing in Utah during the Job Corps enrollments will count towards the time period set forth in [subsection 4.3](#) of this policy.

R512.9 “Participation in Olympic Training Program” Exception to Establishing Resident Student Status.

9.1 A student who is residing in Utah to participate in a United States Olympic athlete training program, at a facility in Utah, approved by the governing body for the athlete’s Olympic sport, shall be immediately eligible for resident student status for tuition purposes. The student shall certify ~~his or her~~ [their](#) participation in the Olympic training program through a supporting letter from the United States Olympic Committee verifying eligibility.

9.2 Upon the termination of the Student’s participation in such training program, the student shall be subject to the same residency standards applicable to other persons under this policy. The time spent residing in Utah during the Olympic athlete training program in Utah counts toward the time period set forth in [subsection 4.3](#) of this policy.

R512.10 “Parent Domiciled in Utah for at Least 12 Months” Exception to Establishing Resident Student Status.

10.1 A dependent student who has at least one parent who has been domiciled in Utah for least 12 months prior to the first day of class of the term for which the student is seeking resident status is eligible for resident student status. The student is responsible to submit the documentation identified in [subsection 4.7](#) of this policy demonstrating that the parent has established domicile in Utah.

R512.11 “Full-time, Permanent Employment in Utah” as Basis for Rebutting Presumption of Nonresident Student.

11.1 A student who has come to Utah for full-time permanent employment, or who is an immediate family member of an individual who has come to Utah for full-time permanent employment, may rebut the presumption of a nonresident classification by providing substantial evidence that the reason for the move to Utah was, in good faith, based on an employer-requested transfer to Utah, recruitment by a Utah employer, or a comparable work-related move for full-time permanent employment in Utah.

11.2 All relevant evidence concerning the motivation for the move should be considered, including, but not limited to, such factors as:

11.2.1 the employee’s employment and educational history;

11.2.2 the dates when Utah employment was first considered, offered, and accepted;

11.2.3 when the person moved to Utah;

11.2.4 the dates when the person applied for admission, was admitted, and was enrolled as a postsecondary student;

11.2.5 whether the person applied for admission to a USHE institution sooner than four months from the date of moving to Utah;

11.2.6 evidence that the person is an independent person (at least 24 years of age, or not listed as a dependent on someone else’s tax forms); and

11.2.7 any other factors related to abandonment of a former domicile and establishment of a new domicile in Utah for purposes other than to attend an institution of higher education.

R512.12 “Divorce, Death of Spouse and Long-Term Health Care Responsibilities of Family Members” as Basis for Rebutting Presumption of Nonresident Student.

12.1 A student who resides in Utah for reasons related to divorce, the death of a spouse, or long-term health care responsibilities for the student’s spouse, parent, sibling, or child, may rebut the presumption of nonresident status by providing substantial evidence that the reason for the student’s move to Utah was, in good faith, based on the long-term health care responsibilities.

12.2 All relevant evidence concerning the motivation for the move shall be considered, including:

12.2.1 the student's employment and educational history;

12.2.2 the dates when the long-term health care or child care responsibilities in Utah were first considered, offered, and accepted;

12.2.3 when the student moved to Utah;

12.2.4 the dates when the student applied for admission, was admitted, and was enrolled as a postsecondary student;

12.2.5 whether the student applied for admission to a USHE institution sooner than four (4) months from the date of moving to Utah;

12.2.6 evidence that the student is an independent person who is

12.2.6.1 at least 24 years of age; or

12.2.6.2 not claimed as a dependent on someone else's tax returns; and

12.2.7 any other factors related to abandonment of a former domicile and establishment of a new domicile in Utah for purposes other than to attend a USHE institution.

R512, Determination of Resident Status¹

R512-1 Purpose: To define “resident” student for purposes of tuition in the Utah System of Higher Education (“USHE”).

R512-2 References

- 2.1 [Utah Code § 53B-8-102](#), Definition of Resident Student
- 2.3 [Utah Code § 41-1a-202](#), Definition of Domicile
- 2.4 [Utah Code Title 53B, Chapter 8, Part 1](#), Tuition Waivers & Scholarships
- 2.5 [Board Policy R510](#), Tuition and Fee Policy
- 2.6 [Board Policy R513](#), Tuition Waivers & Reductions

R512-3 Definitions

3.1 “Continuous Utah Residency Status for One Full Year” means the student has resided in Utah for 12 continuous months prior to the term for which resident student status is being sought.

3.2 “Domicile” shall be defined consistent with general Utah law defining domicile, and, for purposes of determining resident student status, shall be determined by the student’s: (1) bodily presence, and (2) concurrent intent to reside permanently in that location.

All persons have a domicile somewhere. A person can have only one domicile. A domicile of choice is a domicile chosen by a person to replace their former domicile. To acquire a domicile of choice in a place, a person must intend to make that place their home for the time at least. A domicile, once established, continues until it is superseded by a new domicile. Also, once established, a domicile is not lost by an absence from it for months or even years, for the purpose of business or the like, if during such absence there exists an intent to resume residence in the place of domicile following the completion of the purpose of the absence.

3.3 “Immediate Family Member” means the spouse or unmarried dependent child of the individual requesting resident student status.

¹ *Adopted July 22, 1975; amended April 11, 1987, April 17, 1992, May 5, 1995, January 12, 2001, October 19, 2001, July 12, 2002, April 16, 2004, December 9, 2004, April 22, 2005, April 21, 2006, June 8, 2007, May 30, 2008, May 29, 2009, May 20, 2011, May 18, 2012, May 16, 2014, November 14, 2014, May 15, 2015, May 20, 2016, May 15, 2020, and XXX.*

3.4 “Military Servicemember” means an individual who is serving on active duty in the United States Armed Forces within the state of Utah; or an individual who is a member of a reserve component of the United States Armed Forces assigned in Utah; or an individual who is a member of the Utah National Guard; or an individual who maintains domicile in Utah, as described in subsection 6.1.6., but is assigned outside of Utah pursuant to federal permanent change of station orders.

3.5 “Military Veteran” means an individual who:

3.5.1 Has served on active duty:

3.5.1.1 In the United State Armed Forces for at least 180 consecutive days or was a member of a reserve component and has been separated or retired with an honorable or general discharge; or

3.5.1.2 In the National Guard and has been separated or retired with an honorable or general discharge; or

3.5.1.3 Incurred an actual service related injury or disability in the line of duty regardless of whether that person completed 180 days of active duty.

3.6 “Parent” means the biological or adoptive parent of the student, regardless of whether the parent has legal custody of the student or whether the parent claims the student as a dependent.

3.7 “Eligible Person” means an individual entitled to benefits under Title 38 U. S. Code Veterans’ Benefits.

3.8 “Preponderance of the Evidence” means the existence of a fact is more probable than its nonexistence.

3.9 “Resident Student Status” means the condition of being a resident student for tuition purposes.

3.10 “Substantial Evidence” means evidence that is more than a mere preponderance and is definite, clear, and convincing.

3.11 “Utah Residency” means residing in Utah.

3.12 “USHE Institution” means an institution within the Utah System of Higher Education.

R512-4 Resident Student Status

4.1 Establishing Resident Student Status: A student will be granted resident student status after they:

4.1.1 Have acquired domicile in Utah; or

4.1.2 Have satisfied one or more of the exceptions set forth in this policy.

4.2 Policies for Determining Resident Student Status

4.2.1 Policies for Students Enrolled in Credit-Bearing Degree Programs: Each institution shall have the responsibility of determining resident student status according to the requirements of Utah Code section 53B-8-102 and this policy. Each institution may, at its discretion, and at the recommendation of the president, implement its own policy regarding the criteria for resident student status for either undergraduate students or graduate students, or both, in credit-bearing degree programs, that deviates from the criteria set forth in this policy, provided the criteria implemented by the institution is stricter.

4.2.2 Policies for Students Enrolled in Non-Credit Programs: Because most non-credit programs are short-term (require less than a year to complete), USHE institutions offering non-credit courses or programs may, at their discretion, implement a policy that does not require residency classification for students enrolled in non-credit courses or programs.

4.2.3. Policies for Students Enrolled at Technical Colleges: Because most technical education is short-term (requires less than a year to complete), USHE technical colleges, and degree-granting institutions with a technical college role, may, at their discretion, implement a policy that does not require students enrolled in technical education courses or programs to establish residency.

4.2.4 Exception to Establishing Resident Student Status: Each institution may, at its discretion, and at the recommendation of the president, implement its own policy regarding the criteria for resident student status for either undergraduate students or graduate students, or both, in credit-bearing degree programs, that deviates from the criteria set forth in this policy. Such a policy shall not be more lenient than requiring a one-year waiting period as set forth here in subsection 5.1.

4.3 Rebuttable Presumption: A student who has not previously acquired domicile in Utah and who enrolls at a USHE institution prior to residing in Utah for 12 continuous months will be

presumed to not be domiciled in Utah and, therefore, will be classified as a nonresident student for tuition purposes. This presumption may be rebutted by substantial evidence.

4.4 International Students

4.4.1 Classification of International Students Who are in United States on

Nonimmigrant Visas: Students who are aliens and who are present in the United States on visitor, student, or other visas which authorize only temporary presence in this country, do not have the capacity to intend to reside in Utah for an indefinite period and therefore must be classified as nonresident

4.4.2 Classification of International Students Who are in United States on

Immigrant Visas: Students who are aliens and who have been granted immigrant or permanent resident status in the U.S. shall be classified for purposes of resident status according to the same criteria applicable to citizens.

4.4.3 International Students Who Have Obtained Asylum or Refugee Status:

An international student who has obtained asylum or refugee status under U.S. immigration law shall be classified for purposes of resident status according to the same criteria applicable to citizens.

4.5 Marriage to Utah Resident: A person who marries a Utah resident is eligible to be granted resident student status after they have acquired domicile in Utah.

4.6 Burden of Proof: The burden is on the student to prove that they are eligible for resident student status prior to the first day of classes for the term the student seeks to attend as a resident student. Except as set forth in subsection 4.3 of this policy, the standard for establishing resident student status is by a preponderance of the evidence. The institution, through its registrar, or designated person, is authorized to require written documents, affidavits, verifications, or other evidence deemed necessary to determine why a student is in Utah. The institution shall review all relevant evidence that is submitted by the student and shall make the residency determination based on the totality of the circumstances. The evidence submitted by the student shall include the evidence that is specifically required by the applicable section of this policy. In addition, a student may be required to file any or all of the following evidence within applicable timelines established by the institution.

4.6.1 A statement from the student describing employment and expected sources of support;

4.6.2 A statement from the student's employer;

4.6.3 Supporting statements from persons who might be familiar with the family situation;

4.6.4 Birth certificate;

4.6.5 Marriage certificate;

4.6.6 Documentation of eligibility for state social or rehabilitation services;

4.6.7 Documentation of immigration status and placement as political refugee;

4.6.8 Indicia of Utah domicile, including Utah voter registration, Utah vehicle registration, Utah driver's license or identification card, Utah state income tax return, rental contract or mortgage documents, bank records, and utility bills.

4.7 Receipt of State Social Services Benefits: A person who has been determined by a Utah governmental social or rehabilitation services agency to be a Utah resident for purposes of receiving state aid to attend a USHE institution is immediately eligible to apply for resident student status. The state aid must, at a minimum, cover the full cost of resident tuition. Upon the termination of such government agency support, the person is governed by the standards applicable to other persons. Any time spent residing in Utah during the time the individual received government aid shall count towards any applicable waiting period for Utah residency for tuition purposes upon termination of the government aid.

4.8 Reciprocity: The determination to grant residency to a student at a USHE institution shall be honored at other USHE institutions, unless:

4.8.1 the student obtained resident student status under false pretenses, or

4.8.2 the facts existing at the time of the granting of resident student status have significantly changed.

4.9 Reclassification by the Institution: If a student is classified as a resident, or granted residency by a USHE institution, the USHE institution may initiate a reclassification inquiry and in fact reclassify the student, based on any facts, error, or changes in facts or status which would justify such an inquiry, even if the error was on the part of the USHE institution.

4.10 Procedures for Determining Resident Student Status: If a student desires to be granted resident student status, they must comply with the following procedures:

4.10.1 Application Deadline: Students must meet institutional application deadlines for each term. Institutions may establish a policy regarding acceptance of late residency applications for current term consideration. Unless institutional policy allows otherwise, institutions may not accept applications for resident student status or supporting documentation after the third week of the semester or term for which the student seeks resident student status. Ordinarily applications or supporting documentation received after the third week should be considered for the following semester.

4.10.2 Initial Classification: Each institution shall initially classify all applicants as either resident or nonresident. If there is doubt concerning resident status, the applicant shall be classified as a nonresident.

4.10.3 Application for Reclassification: Every student classified as a nonresident shall retain that status until they are officially reclassified as a resident.

4.10.4 Refund: A decision favorable to the applicant shall be retroactive to the beginning of the academic period for which application for resident status was made and shall require a refund of the nonresident portion of any tuition charges paid for that and subsequent academic periods.

4.10.5 Hearings: Each institution shall be responsible for providing a process for students who have been denied resident student status to be heard. Each institution shall adopt procedures that fit the local campus situation, but the following guidelines shall be followed:

4.10.5.1 Procedures for a hearing shall be set out in writing by the institution, subject to approval by the Office of the Commissioner.

4.10.5.2 The institution shall provide a hearing officer or hearing committee with appropriate clerical and other services as necessary to the effective function of the hearing process.

4.10.5.3 The student appealing the decision shall have the responsibility of providing evidence that proves that they have met the residency requirements. Students shall be given copies of the Board's policies pertaining to determination of residency. The student shall also be given an explanation of the rationale of the decision-maker who previously ruled that the student was classified as a nonresident.

4.10.5.4 Both the student and the administration's representative are entitled to representation by counsel.

4.10.5.5 Oral and written evidence may be presented. It is not required that a formal, written, verbatim record of the proceedings be kept, but a written summary of the significant assertions and findings of the hearing shall be prepared.

4.10.5.6 It is not required that formal rules of evidence be followed; administrative hearing rules may be used.

4.10.5.7 Decisions of the hearing officer or hearing committee must be in writing and must give reasons for the decision.

4.11 Declaration of Financial Independence: In addition to submitting objective evidence of domicile, a person seeking resident student status must also submit a declaration of financial independence, which must include, at a minimum, evidence that the person is not claimed as a dependent on the most recently filed federal tax returns of any person who is not a resident of Utah. Institutional residency officers shall require such documentation at the time of initial application for resident student status.

4.12 Penalties for Giving Incorrect or Misleading Information: A student who gives incorrect or misleading information to evade payment of nonresident fees shall be subject to serious disciplinary action and must also pay the applicable nonresident fees for each term previously attended.

4.13 Waivers of Nonresident Tuition—Nonresident Students Exempt from Nonresident Portion of Tuition: The following students who attend a USHE institution may receive a waiver of nonresident tuition under Board Policy R513; however, these students may not use time spent in Utah as a student on any of these programs toward any waiting period that may be required for resident tuition status. For more information on all tuition waivers, please see Board Policy R513.

4.13.1 Western Undergraduate Exchange (WUE) Students: A student attending a USHE institution under the Western Undergraduate Exchange program is considered to be domiciled in their home state. *See* Board Policy R513-8 for further details regarding WUE.

4.13.2 Western Regional Graduate Program (WRGP): A student attending a USHE institution under the Western Regional Graduate Program is considered to be domiciled in their home state.

4.13.3 Professional Student Exchange Program/WICHE Students: A student attending a USHE institution under the Professional Student Exchange Program/WICHE Program is considered to be domiciled in their home state. *See* Board Policy R513-8 for further details regarding WICHE.

4.13.4 Exemption for Alumni Legacy Scholarships: The students attending a USHE institution under this scholarship are considered to be domiciled in their home state. *See* Board Policy R513-17 for further details regarding Alumni Legacy Scholarships.

4.13.5 Utah Tech University's Good Neighbor Students: The students attending Utah Tech University under this scholarship are considered to be domiciled in their home state. *See* Board Policy R513-4.2. for further details regarding Good Neighbor Students.

R512.5 “Student Who Has Come to Utah For the Purpose of Attending an Institution of Higher Education” Exception to Establishing Resident Student Status

5.1 General Rule: A student who has come to Utah for the purpose of attending an institution of higher education may be granted resident student status if, prior to the first day of classes of the term the student seeks to attend as a resident student, the student has:

5.1.1 maintained continuous Utah residency status for one full year;

5.1.2 submitted a written declaration that the student has relinquished residency in any other state;

5.1.3 submitted objective evidence that the student has taken overt steps to establish permanent residency in Utah and that the student does not maintain a residence elsewhere; and

5.1.4 submitted a declaration of financial independence to include documentation that the student is not claimed as a dependent on the tax returns of any person who is not a resident of Utah (see subsection 4.12 above)

5.2 Evidence Required: Students applying for resident student status under this section are expected to submit as much objective evidence as possible, including, but not limited to, providing evidence of, or explanation of the lack of evidence of, each of the following:

5.2.1 A Utah high school transcript issued in the past year confirming attendance at a Utah high school in the previous 12 months;

5.2.2 A Utah voter registration dated a reasonable period (generally meaning within the past 90 days) prior to the first day of class of the term for which the student is seeking resident status;

5.2.3 A Utah driver license or identification card with an original date of issue or renewal date several months prior to the first day of class of the term for which the student is seeking resident status;

5.2.4 A Utah vehicle registration dated a reasonable period (generally meaning within the past 90 days) prior to the first day of class of the term for which the student is seeking resident status;

5.2.5 Evidence of employment in Utah for a reasonable period (generally meaning within the past 90 days) prior to the first day of class of the term for which the student is seeking resident status;

5.2.6 Proof of payment of Utah resident income tax for the previous year;

5.2.7 A rental agreement or mortgage document showing the student's name and Utah address for at least 12 months prior to the first day of class of the term for which the student is seeking resident status; and

5.2.8 Utility bills showing the student's name and Utah address for at least 12 months prior to the first day of class of the term for which the student is seeking resident status resident student status.

5.3 Absence from State: A student will not jeopardize their status under this section solely by absence from the state for a period of less than 30 total days during the 12-month period. See *Frame v. Residency Appeals Committee*, 675 P2d. 1157 (Utah 1983). If a student leaves the state for the purpose of satisfying the requirements for institutional internships, institutional courses, study abroad programs, or athletic training, required by the institution the student will not be deemed to be absent from the state for purposes of this section for the period of time that they can establish that these purposes were being met. Once a student has been granted resident student status, any future absence from the state will not negatively affect their resident student status.

Example: A student who comes to a Utah school on an athletic scholarship and who, during their first 12 months in Utah, is required to attend a training camp out of state, will be able to count the time out of state at the training camp as part of the 12-month waiting period that is requisite to being granted resident tuition status.

Example: After being granted resident student status, a student may be absent from the state for purposes such as temporary employment, education, religious, charitable, or military service and continue to be considered a resident for tuition purposes provided they have not taken action to establish domicile elsewhere during their absence from Utah.

R512.6 “Military Service” Exception to Establishing Resident Student Status.

6.1 A USHE institution shall grant resident student status for tuition purposes to:

6.1.1 A military servicemember, if the military servicemember provides:

6.1.1.1 the military servicemember’s current United States military identification card; and

6.1.1.2 a statement from the military servicemember’s current commander, or equivalent, stating that the military servicemember is assigned to Utah; or

6.1.1.3 evidence that the military servicemember is domiciled in Utah, as described in subsection 6.1.6

6.1.2 A military servicemember’s immediate family member, if the military servicemember’s immediate family member provides:

6.1.2.1 the military servicemember’s current United States military identification card or the immediate family member’s current United States military identification card; and

6.1.2.2 a statement from the military servicemember’s current commander, or equivalent, stating that the military servicemember is assigned in Utah; or

6.1.2.3 the military servicemember’s current United States military identification card or the immediate family member’s current United States military identification card, and evidence that the military servicemember is domiciled in Utah, as described in subsection 6.1.6.

6.1.3 A military veteran, regardless of whether the military veteran served in Utah, if the military veteran provides:

6.1.3.1 evidence of an honorable or general discharge;

6.1.3.2 a signed written declaration that the military veteran has relinquished residency in any other state and does not maintain a residence elsewhere;

6.1.3.3 objective evidence that the military veteran has demonstrated an intent to establish residency in Utah, which may include any one of the following:

6.1.3.3.1 a Utah voter registration card;

6.1.3.3.2 a Utah driver license or identification card;

6.1.3.3.3 a Utah vehicle registration;

6.1.3.3.4 evidence of employment in Utah;

6.1.3.3.5 a rental agreement showing the military veteran's name and Utah address; or

6.1.3.3.6 utility bills showing the military veteran's name and Utah address.

6.1.4 A military veteran's immediate family member, regardless of whether the military veteran served in Utah, if the military veteran's immediate family member provides:

6.1.4.1 evidence of the military veteran's honorable or general discharge;

6.1.4.2 a signed written declaration that the military veteran's immediate family member has relinquished residency in any other state and does not maintain a residence elsewhere; and

6.1.4.3 objective evidence that the military veteran's immediate family member has demonstrated an intent to establish residency in Utah which may include any one of the items described in subsection 6.1.3.3. above.

6.1.5 An eligible person who provides:

6.1.5.1 evidence of eligibility under Title 38 U. S. Code Veterans' Benefits; and

6.1.5.2 a signed written declaration that the eligible person will utilize GI Bill benefits; and

6.1.5.3 objective evidence that the eligible person has demonstrated an intent to establish residency in Utah, which may include any one of the items described in subsection 6.1.3.3. above.

6.1.6 Evidence of domicile as described in subsections 6.1.1.3 and 6.1.2.3 includes:

6.1.6.1 a current Utah voter registration card;

6.1.6.2 a valid Utah driver license or identification card;

6.1.6.3 a current Utah vehicle registration

6.1.6.4 a copy of a Utah income tax return, in the military servicemember's or military servicemember's spouse's name, filed as a resident in accordance with Utah Code section 59-10-502; or

6.1.6.5 proof that the military servicemember or military servicemember's spouse owns a home in Utah, including a property tax notice for property owned in Utah.

R512.7 “Membership of an American Indian Tribe” Exception to Establishing Resident Student Status

7.1 Any American Indian who is enrolled on the tribal rolls of a tribe whose reservation or trust lands lie partly or wholly within Utah or whose border is at any point contiguous with the border of Utah is entitled to be granted resident student status.

7.2 Any American Indian who is a member of a federally recognized or known Utah tribe and has graduated from a Utah high school is entitled to be granted resident student status.

7.3 A list of recognized tribes will be maintained by the Office of the Commissioner of Higher Education and distributed to all campus residency officers.

R512.8 “Job Corps Student” Exception to Establishing Resident Student Status.

8.1 A Job Corps student is entitled to resident student status if the student:

8.1.1 is admitted as a full-time, part-time, or summer school student in a program of study leading to a degree or certificate; and

8.1.2 submits verification that the student is a current Job Corps student.

8.2 Upon termination of the student's Job Corps enrollment/participation, the student shall be subject to the same residency standards applicable to other persons under this policy. The time

spent residing in Utah during the Job Corps enrollments will count towards the time period set forth in subsection 4.3 of this policy.

R512.9 “Participation in Olympic Training Program” Exception to Establishing Resident Student Status

9.1 A student who is residing in Utah to participate in a United States Olympic athlete training program, at a facility in Utah, approved by the governing body for the athlete’s Olympic sport, shall be immediately eligible for resident student status for tuition purposes. The student shall certify their participation in the Olympic training program through a supporting letter from the United States Olympic Committee verifying eligibility.

9.2 Upon the termination of the Student’s participation in such training program, the student shall be subject to the same residency standards applicable to other persons under this policy. The time spent residing in Utah during the Olympic athlete training program in Utah counts toward the time period set forth in subsection 4.3 of this policy.

R512.10 “Parent Domiciled in Utah for at Least 12 Months” Exception to Establishing Resident Student Status

10.1 A dependent student who has at least one parent who has been domiciled in Utah for least 12 months prior to the first day of class of the term for which the student is seeking resident status is eligible for resident student status. The student is responsible to submit the documentation identified in subsection 4.7 of this policy demonstrating that the parent has established domicile in Utah.

R512.11 “Full-time, Permanent Employment in Utah” as Basis for Rebutting Presumption of Nonresident Student

11.1 A student who has come to Utah for full-time permanent employment, or who is an immediate family member of an individual who has come to Utah for full-time permanent employment, may rebut the presumption of a nonresident classification by providing substantial evidence that the reason for the move to Utah was, in good faith, based on an employer-requested transfer to Utah, recruitment by a Utah employer, or a comparable work-related move for full-time permanent employment in Utah.

11.2 All relevant evidence concerning the motivation for the move should be considered, including, but not limited to, such factors as:

11.2.1 the employee’s employment and educational history;

11.2.2 the dates when Utah employment was first considered, offered, and accepted;

- 11.2.3** when the person moved to Utah;
- 11.2.4** the dates when the person applied for admission, was admitted, and was enrolled as a postsecondary student;
- 11.2.5** whether the person applied for admission to a USHE institution sooner than four months from the date of moving to Utah;
- 11.2.6** evidence that the person is an independent person (at least 24 years of age, or not listed as a dependent on someone else's tax forms); and
- 11.2.7** any other factors related to abandonment of a former domicile and establishment of a new domicile in Utah for purposes other than to attend an institution of higher education.

R512.12 “Divorce, Death of Spouse and Long-Term Health Care Responsibilities of Family Members” as Basis for Rebutting Presumption of Nonresident Student.

12.1 A student who resides in Utah for reasons related to divorce, the death of a spouse, or long-term health care responsibilities for the student's spouse, parent, sibling, or child, may rebut the presumption of nonresident status by providing substantial evidence that the reason for the student's move to Utah was, in good faith, based on the long-term health care responsibilities.

12.2 All relevant evidence concerning the motivation for the move shall be considered, including:

- 12.2.1** the student's employment and educational history;
- 12.2.2** the dates when the long-term health care or child care responsibilities in Utah were first considered, offered, and accepted;
- 12.2.3** when the student moved to Utah;
- 12.2.4** the dates when the student applied for admission, was admitted, and was enrolled as a postsecondary student;
- 12.2.5** whether the student applied for admission to a USHE institution sooner than four (4) months from the date of moving to Utah;
- 12.2.6** evidence that the student is an independent person who is
 - 12.2.6.1** at least 24 years of age; or

12.2.6.2 not claimed as a dependent on someone else's tax returns; and

12.2.7 any other factors related to abandonment of a former domicile and establishment of a new domicile in Utah for purposes other than to attend a USHE institution.

R514, Refunds of Tuition, Fees, and Other Student Charges¹

R514-1 Purpose: To establish a refund policy for ~~the~~ Utah System of Higher Education (“USHE”) institutions for tuition, fees, and other student charges.

R514-2 References

- 2.1 [Utah Code § 53B-7-101](#), Combined Requests for Appropriations
- 2.2 [20 U.S. Code § 1091b](#), Institutional Refunds
- 2.3 [34 CFR § 668.22, Treatment of Title IV Funds When Student Withdraws](#)
- 2.4 ~~3~~ [Board Policy R510](#), Tuition
- 2.5 ~~4~~ [Board Policy R511](#), Tuition Disclosures and Consultation

R514-3 Refunds of ~~T~~Tuition, ~~F~~ees, and ~~O~~ther ~~S~~tudent ~~C~~harges

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 ~~they~~ receive ~~ing~~ ~~F~~federal student financial aid, and also ~~for~~ ~~to support~~ specific compliance with the provisions of ~~Section 484B of the Federal Higher Education Act, as amended (20 USC 1091b)~~ [20 USC 1091b](#)), as applicable to students who receive ~~F~~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:

¹ Approved November 16, 2018; [amended XXX](#).

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

Refund Period – Technical Colleges and Technical Education at Degree-granting Institutions with a Technical College Role	
<u>Prior to beginning of class</u>	<u>100%</u>
<u>After the 5th calendar day of the enrollment period</u>	<u>none</u>

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 Ffederal 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 Ffederal 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.

R514, Refunds of Tuition, Fees, and Other Student Charges¹

R514-1 Purpose: To establish a refund policy for Utah System of Higher Education (“USHE”) institutions for tuition, fees, and other student charges.

R514-2 References

- 2.1 [Utah Code § 53B-7-101](#), Combined Requests for Appropriations
- 2.2 [20 U.S. Code § 1091b](#), Institutional Refunds
- 2.3 [34 CFR § 668.22](#), Treatment of Title IV Funds When Student Withdraws
- 2.4 [Board Policy R510](#), Tuition
- 2.5 [Board 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 they receive federal student financial aid, and also to support specific compliance with the provisions of 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 – Degree-Granting Institutions	Portion Refundable
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¹ Approved November 16, 2018; amended XXX.

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

Refund Period – Technical Colleges and Technical Education at Degree-granting Institutions with a Technical College Role	
Prior to beginning of class	100%
After the 5 th calendar day of the enrollment period	none

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 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.

R516, General Student Fees

R516-1 Purpose: To establish the process for establishing, reviewing, revising, and repealing general student fees for ~~degree-granting~~ institutions in the Utah System of Higher Education ([“USHE”](#)).

R516-2 References

- 2.1 [Utah Code Title 53b Chapter 1](#), (~~Governance, Powers, Rights, and Responsibilities~~)
- 2.2 [Utah Code § 53B-7-101](#), (~~Combined Requests for Appropriations~~)
- 2.3 ~~Federal Higher Education Act, 20 U.S. Code § 1091b~~, (~~Institutional Refunds~~)
- 2.4 [Board Policy: R510](#), (~~Tuition~~)
- 2.5 [Board Policy: R514](#), (~~Refunds of Tuition, Fees, and Other Student Charges~~)
- 2.6 [Board Policy: R511](#), (~~Tuition Disclosures and Consultation~~)
- 2.7 [Board Policy: R590](#), (~~Issuance of Bonds for Colleges and Universities~~)

R516-3 Definitions

- 3.1 **“Degree-granting institutions”** ~~means:~~ [a](#) ~~An~~ institution of higher education described in [Utah Code section 53-B-1-102\(1\)\(a\)](#)
- 3.2 **“General student fees”** ~~means:~~ [I](#) ~~institution-wide~~ mandatory fees assessed to students upon registration to benefit students broadly and to support student inclusion, enrichment, and success as a campus community.
- 3.3 **“General Student Fee Advisory Board”** ~~is:~~ [a](#) ~~An~~ institutional committee comprised of students, faculty, and administrators that oversees the establishment, review, revision, or repeal of general student fees.
- 3.4 **—“Technical college”** ~~means:~~ [a](#) ~~An~~ institution of higher education described in [Utah Code section 53B-1-102\(1\)\(b\)](#).

R516-4 Affordability in the Utah System of Higher Education: The Utah Board of Higher Education has established affordability as a top priority. To support that priority, institutions and boards of trustees should consider all alternatives before recommending new fees or fee increases. Boards of trustees should rigorously scrutinize requests for student fees and fee increases, ensuring they are justifiable, reasonable, and benefit students broadly, as described herein. Boards of trustees should particularly assess how general student fees support diversity, equity, and inclusion.

R516-5 Authority for Establishing General Student Fees: The Board is statutorily responsible to establish all general student fees. The Board normally establishes general student fees concurrently with tuition rates. [Technical colleges are not authorized to charge general student fees. Therefore, the provisions of this policy shall not apply to technical colleges.](#)

5.1 General Student Fee Purpose: Institutions must identify the specific purpose for which revenue generated from a general student fee will be used. Institutions may not use revenue from general student fees to fund instruction, academic support, general administrative expenses, or other expenses that should reasonably be covered with state appropriations or tuition. Institutions may request general student fees for the following purposes:

5.1.1 Student-Approved Facility Construction: Revenue from general student fees may be pledged to secure bonds to construct or renovate a specific facility that the student body approved in accordance with subsection 6.6. Such facilities shall be for the enrichment of the student experience and may not be for the construction of instructional space.

5.1.2 Student-Approved Facility Operation: Revenue from general student fees may be used to fund operation and maintenance, capital improvements, and other necessary operating expenses for student-approved facilities in ~~S~~ subsection 5.1.1.

5.1.3 Student Activities, Programs, and Services: Revenue from general student fees may be used to fund activities, programs, and services from which the general student body may benefit.

5.2 Publication of General Student Fees: Institutions shall publish tuition and general student fees on their websites.

5.3 Revenue from General Student Fees: Revenue from general student fees is restricted to the specific program areas, facilities, and services for which they are approved and shall be established to cover budgeted expenses. Institutions may accumulate fund balances for large expenditures or reserves needing multi-year revenues only if planned, budgeted and pre-approved by the institution's board of trustees. Institutions shall annually budget general student fee revenue and expenses and shall account for the revenue of each general student fee individually and separately from other sources.

5.4 Policy Implementation for Existing General Student Fees: An institution's general student fee advisory board, president, and board of trustees shall review existing general student fees to determine if the fees align with the categories in subsection 5.1. Existing fees that do not

align with subsection 5.1 shall be considered for repeal, transition to tuition, or for an exception to this policy as granted by the Utah Board of Higher Education.

R516-6 Process for Creating, Revising, and Repealing General Student Fees

6.1 General Student Fee Advisory Board: Each institution shall establish a general student fee advisory board which shall oversee establishing, revising, maintaining, or repealing general student fees.

6.1.1 Composition of Board: The majority of the General Student Fee Advisory Board shall be comprised of currently enrolled students. Administrators and faculty may also be appointed to the advisory board. The board shall be chaired by a currently enrolled student.

6.1.2 Appointment and Procedures of the Board: Each institution will adopt policies and procedures for appointing members of the general student fee advisory board and for the operation of the board consistent with this policy.

6.2 Institutional Policy: Each institution shall develop a general student fee policy to govern the institution's processes for establishing, reviewing, revising, or repealing general student fees. The institutional policy shall include the following elements:

6.2.1 Establishing Fees: Establishing new student fees shall be supported by a demonstrated need, a clear statement describing the purpose of the fee, and a sound budget plan.

6.2.2 Reviewing Fees: Each institution's general student fee advisory board and board of trustees shall annually review each general student fee to ensure the fee still meets established objectives. The general student fee advisory board shall require an annual report from each student fee program manager, review institutional enrollment projections and enrollment impact on general student fee revenue, examine whether each general student fee maybe proportionally adjusted with enrollment change, and assess the adequacy of fund balances as allowed in subsection 5.3. The general student fee advisory board shall provide a report of their annual review of each general student fee, including any recommendations for revision or repeal, to the board of trustees, which shall review the information and may make recommendations or revision or repeal of a general student fee.

6.2.3 Revising Fees: Proposed revisions to general student fees must include a rationale for the proposed change and a revised budget plan.

6.2.4 Repealing Fees: Institutions may recommend the repeal of a general student fee when pledged revenue is no longer needed for debt service or when programs, services, or activities are discontinued, or an alternative funding source is identified.

6.2.5 Five-Year Comprehensive Review: Beginning in 2020-21 and every five years thereafter, the general student fee advisory board and the board of trustees shall comprehensively review all general student fees and determine whether each fee should be retained, transitioned to tuition or state appropriations, or repealed. The board of trustees shall submit a report of their comprehensive review including the justification for each fee determination to the Utah Board of Higher Education.

6.2.6 Sunset of Student Approved Facility Construction Fees: Each general student fee established for constructing or renovating a student-approved facility under subsection 5.1.1 shall be repealed by the beginning of the academic year after bond obligations end. Fees created or adjusted for student-approved facility operation under 5.1.2 shall continue and be annually reviewed and adjusted according to the procedures set in this policy.

6.3 Student Notice and Student Hearing: Institutions proposing a new general student fee, revising an existing general student fee, or repealing a general student fee shall:

6.3.1 Notify currently enrolled students using a method(s) that the institution determines best reaches the majority of students (e.g. email, text, social media, student newspaper, digital signage, etc.) of the proposed change and the date, time, and location of a student hearing on the proposal.

6.3.2 Hold a student hearing which shall be attended by at least one student representative from the general student fee advisory board. The student representative shall provide a summary of student comments received during the hearing to the institution's board of trustees. The hearing may be held in conjunction with the institution's truth-in-tuition hearing.

6.4 Board of Trustees Oversight and Review: The institution's board of trustees shall review requests to establish, revise, or repeal a general student fee and make a recommendation. The board of trustees shall consider the general student fee advisory board's recommendations and accompanying documentation of demonstrated need, purpose, and budget plan and shall ensure the recommendations comply with the purposes stated in this policy, including that they are justifiable, reasonable, and benefit students broadly, as described herein. The board of trustees shall provide its recommendations to the Utah Board of Higher Education for approval.

6.5 Board of Higher Education Approval: The Board shall consider a board of trustees' recommendation and, by majority vote in a public Board meeting, approve, modify, or deny the establishment, revision, continuance, or repeal of a general student fee.

6.6 General Student Body Voting for General Student Fee Funded Facility

Construction and Operation: Except as provided by [Ssubsection 6.6.4](#), institutions proposing new general student fees for student-approved facility construction or renovation projects shall conduct a vote of the student body.

6.6.1 Institutions shall notify currently enrolled students and provide them the following information regarding the purpose and amount of the proposed fees at least 30 days prior to a vote:

6.6.1.1 details of the proposed facility and estimated costs for construction;

6.6.1.2 the projected amount of the general student fee needed to fund the debt service for the cost of facility construction or renovation;

6.6.1.3 the estimated length of debt service;

6.6.1.4 the estimated costs, over the life of the facility, for the operation of the facility including operation and maintenance and capital improvements; and

6.6.1.5 the projected amount of the general student fee to cover the cost of facility operation including operations and maintenance, capital improvements, and other necessary operating expenses.

6.6.2 A majority of voting students must vote in favor of the proposal to move forward to the board of trustees.

6.6.3 In establishing a general student fee for student-approved facility construction, the board of trustees shall consider the results of the student body vote including the percentage of the student body who voted in the election and the percentage of students who voted in favor of the proposal.

6.6.4 General student fees that are proposed to renovate or replace an existing student-approved facility do not require a vote of the student body if the project does not expand the facility's capacity and does not exceed \$10,000,000 for institutions with a research mission,

\$6,000,000 for other degree-granting institutions with more than 10,000 student headcount and \$4,000,000 for other degree-granting institutions.

R516-7 Audit: In conjunction with the annual review of USHE institution tuition use required by [Board Policy R510-4](#), the USHE auditor shall review the selected institutions' general student fees for compliance with this policy.

R516-8 Option to Waive General Student Fees: Institutions may waive general student fees in whole or in part for students without prior Board authorization.

R516, General Student Fees

R516-1 Purpose: To establish the process for establishing, reviewing, revising, and repealing general student fees for institutions in the Utah System of Higher Education (“USHE”).

R516-2 References

- 2.1 [Utah Code Title 53b Chapter 1](#), Governance, Powers, Rights, and Responsibilities
- 2.2 [Utah Code § 53B-7-101](#), Combined Requests for Appropriations
- 2.3 [20 U.S. Code § 1091b](#), Institutional Refunds
- 2.4 [Board Policy R510](#), Tuition
- 2.5 [Board Policy R514](#), Refunds of Tuition, Fees, and Other Student Charges
- 2.6 [Board Policy R511](#), Tuition Disclosures and Consultation
- 2.7 [Board Policy R590](#), Issuance of Bonds for Colleges and Universities

R516-3 Definitions

- 3.1 **“Degree-granting institution”** means an institution of higher education described in Utah Code section 53-B-1-102(1)(a)
- 3.2 **“General student fees”** means institution-wide mandatory fees assessed to students upon registration to benefit students broadly and to support student inclusion, enrichment, and success as a campus community.
- 3.3 **“General Student Fee Advisory Board”** is an institutional committee comprised of students, faculty, and administrators that oversees the establishment, review, revision, or repeal of general student fees.
- 3.4 **“Technical college”** means an institution of higher education described in Utah Code section 53B-1-102(1)(b).

R516-4 Affordability in the Utah System of Higher Education: The Utah Board of Higher Education has established affordability as a top priority. To support that priority, institutions and boards of trustees should consider all alternatives before recommending new fees or fee increases. Boards of trustees should rigorously scrutinize requests for student fees and fee increases, ensuring they are justifiable, reasonable, and benefit students broadly, as described herein. Boards of trustees should particularly assess how general student fees support diversity, equity, and inclusion.

R516-5 Authority for Establishing General Student Fees: The Board is statutorily responsible to establish all general student fees. The Board normally establishes general student fees concurrently with tuition rates. Technical colleges are not authorized to charge general student fees. Therefore, the provisions of this policy shall not apply to technical colleges.

5.1 General Student Fee Purpose: Institutions must identify the specific purpose for which revenue generated from a general student fee will be used. Institutions may not use revenue from general student fees to fund instruction, academic support, general administrative expenses, or other expenses that should reasonably be covered with state appropriations or tuition. Institutions may request general student fees for the following purposes:

5.1.1 Student-Approved Facility Construction: Revenue from general student fees may be pledged to secure bonds to construct or renovate a specific facility that the student body approved in accordance with subsection 6.6. Such facilities shall be for the enrichment of the student experience and may not be for the construction of instructional space.

5.1.2 Student-Approved Facility Operation: Revenue from general student fees may be used to fund operation and maintenance, capital improvements, and other necessary operating expenses for student-approved facilities in subsection 5.1.1.

5.1.3 Student Activities, Programs, and Services: Revenue from general student fees may be used to fund activities, programs, and services from which the general student body may benefit.

5.2 Publication of General Student Fees: Institutions shall publish tuition and general student fees on their websites.

5.3 Revenue from General Student Fees: Revenue from general student fees is restricted to the specific program areas, facilities, and services for which they are approved and shall be established to cover budgeted expenses. Institutions may accumulate fund balances for large expenditures or reserves needing multi-year revenues only if planned, budgeted and pre-approved by the institution's board of trustees. Institutions shall annually budget general student fee revenue and expenses and shall account for the revenue of each general student fee individually and separately from other sources.

5.4 Policy Implementation for Existing General Student Fees: An institution's general student fee advisory board, president, and board of trustees shall review existing general student fees to determine if the fees align with the categories in subsection 5.1. Existing fees that do not align with subsection 5.1 shall be considered for repeal, transition to tuition, or for an exception to this policy as granted by the Utah Board of Higher Education.

R516-6 Process for Creating, Revising, and Repealing General Student Fees

6.1 General Student Fee Advisory Board: Each institution shall establish a general student fee advisory board which shall oversee establishing, revising, maintaining, or repealing general student fees.

6.1.1 Composition of Board: The majority of the General Student Fee Advisory Board shall be comprised of currently enrolled students. Administrators and faculty may also be appointed to the advisory board. The board shall be chaired by a currently enrolled student.

6.1.2 Appointment and Procedures of the Board: Each institution will adopt policies and procedures for appointing members of the general student fee advisory board and for the operation of the board consistent with this policy.

6.2 Institutional Policy: Each institution shall develop a general student fee policy to govern the institution's processes for establishing, reviewing, revising, or repealing general student fees. The institutional policy shall include the following elements:

6.2.1 Establishing Fees: Establishing new student fees shall be supported by a demonstrated need, a clear statement describing the purpose of the fee, and a sound budget plan.

6.2.2 Reviewing Fees: Each institution's general student fee advisory board and board of trustees shall annually review each general student fee to ensure the fee still meets established objectives. The general student fee advisory board shall require an annual report from each student fee program manager, review institutional enrollment projections and enrollment impact on general student fee revenue, examine whether each general student fee maybe proportionally adjusted with enrollment change, and assess the adequacy of fund balances as allowed in subsection 5.3. The general student fee advisory board shall provide a report of their annual review of each general student fee, including any recommendations for revision or repeal, to the board of trustees, which shall review the information and may make recommendations or revision or repeal of a general student fee.

6.2.3 Revising Fees: Proposed revisions to general student fees must include a rationale for the proposed change and a revised budget plan.

6.2.4 Repealing Fees: Institutions may recommend the repeal of a general student fee when pledged revenue is no longer needed for debt service or when programs, services, or activities are discontinued, or an alternative funding source is identified.

6.2.5 Five-Year Comprehensive Review: Beginning in 2020-21 and every five years thereafter, the general student fee advisory board and the board of trustees shall comprehensively review all general student fees and determine whether each fee should be retained, transitioned to tuition or state appropriations, or repealed. The board of trustees shall submit a report of their comprehensive review including the justification for each fee determination to the Utah Board of Higher Education.

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6.5 Board of Higher Education Approval: The Board shall consider a board of trustees' recommendation and, by majority vote in a public Board meeting, approve, modify, or deny the establishment, revision, continuance, or repeal of a general student fee.

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Construction and Operation: Except as provided by subsection 6.6.4, institutions proposing new general student fees for student-approved facility construction or renovation projects shall conduct a vote of the student body.

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6.6.4 General student fees that are proposed to renovate or replace an existing student-approved facility do not require a vote of the student body if the project does not expand the facility's capacity and does not exceed \$10,000,000 for institutions with a research mission, \$6,000,000 for other degree-granting institutions with more than 10,000 student headcount and \$4,000,000 for other degree-granting institutions.

R516-7 Audit: In conjunction with the annual review of USHE institution tuition use required by Board Policy R510-4, the USHE auditor shall review the selected institutions' general student fees for compliance with this policy.

R516-8 Option to Waive General Student Fees: Institutions may waive general student fees in whole or in part for students without prior Board authorization.

R517, Course and Program Fees¹

R517-1 Purpose: To establish the process for establishing, reviewing, revising, and repealing course and program fees for institutions in the Utah System of Higher Education.

R517-2 References

2.1 [Utah Code Title 53B, Chapter 1](#), (Governance, Powers, Rights, and Responsibilities)

R517-3 Definitions

3.1 ~~“Course Fees”~~ [means](#) ~~F~~fees established to cover allowable costs of a particular course not covered by tuition.

3.2 ~~“Program Fees”~~ [means](#) ~~F~~fees established to cover allowable costs of a particular program of study not covered by tuition.

R517-4 Affordability in the Utah System of Higher Education: The Utah Board of Higher Education has established affordability as a strategic priority. To support that priority, institutions and boards of trustees should consider the impact course fees and program fees have on the cost of attendance.

R517-5 General Principles: In addition to Board-approved tuition and general student fees, institutions may assess course-based and program-based fees established in accordance with this policy. This policy does not apply to courses or programs that do not charge Board-approved tuition such as continuing education or self-supporting courses.

Course fees and program fees may be instituted to cover direct costs essential to the educational outcomes for specific course or program offerings, and often include materials that cannot be purchased by individual students or for which bulk purchases reduce the cost to students. Such direct costs include course materials, chemicals, tooling, uniforms, laundry, testing, off-site instructional activities, supplies used in instruction; instructional equipment; student licensure and certifications; maintenance of laboratory equipment, computer software, subscriptions or transportation in which the entire class participates.

¹ Adopted: May 21, 2021; [amended XXX](#).

~~5.1~~ Course and program fees should cover only the specific costs associated with the particular course or program.

~~5.2~~ Institutions may not charge course or program fees for costs that are incurred across all programs or courses.

~~5.3~~ Course and program fees should recover costs when no other dedicated funds are available for that purpose.

~~5.4~~ Institutions should set course and program fees based on the cost of the activity or service for which the fee is levied.

~~5.5~~ Institutions may use course and program fees only to support the activity or service for which the fee is being charged.

~~5.6~~ Institutions shall track and account course and program fees in such a way that the proper use of revenue can be evaluated or audited.

~~5.7~~ With the exception of equipment replaced on a rotating schedule, course and program fees shall be used each academic period for the benefit of the students who paid the fees.

~~5.8~~ Course and program fees ~~at degree-granting institutions~~ shall not be used to pay instructional services rendered by faculty, staff, and teaching assistants. Exceptions may include special instructional arrangements such as private music, aviation, clinical, and tutors.

~~5.9~~ Course and program fees should not be used to pay for materials that can be purchased directly by students through campus stores or other approved institutional entities.

Exceptions to these general principles shall be documented by the institution and reviewed periodically by the institution's course and program fee committee.

R517-6 ~~Delegation of Authority to Establish Course Fees:~~ The Board delegates to the boards of trustees the responsibility to review, approve, adjust, and repeal course fees and program fees.

R517-7 ~~Institutional Policy:~~ Each institution shall develop a course and program fee policy and procedure to govern the institution's processes for establishing, reviewing, revising, and repealing course fees and program fees. The institutional policy shall include the following elements:

7.1- Institution Course and Program Fee Committee: Each institution shall establish a course and program fee committee, which shall oversee the establishing, revising, maintaining, or repealing course and program fees.

7.1.1- Appointment and Procedures of the Committee: -Each institution will adopt policies and procedures for appointing members of the course and program fee committee and for the operation of the committee consistent with this policy.

7.1.2- Student Participation in the Committee: -Institutions shall invite student participation in the course and program fee committee.

7.1.3- Duties of the Committee: The course and program fee committee shall ensure that course fees and program fees are justifiable, reasonable, and necessary for the specific course or program for which they are proposed.

7.1.3.1- The institutional course and program fee committees shall review all proposals to establish new course and program fees to ensure the proposals meet the general principles of this policy and are supported by a demonstrated need, a clear statement describing the purpose of the fee, and a sound budget plan. If the committee determines the proposed fee meets these criteria, it may forward the proposal to the board of trustees. The board of trustees shall review the proposed fee in accordance with the criteria in this policy and the institution's program and course fee policy and, if satisfied, may approve the new fee.

7.1.3.2- Institutional course and program fee committees shall review all proposed course and program fee revisions with their associated revised budget plans and evaluate the rationale for the proposed change.

7.1.3.3- Each institution's course and program fee committee shall review each course and program fee at least once every three years to ensure the fee still meets established objectives. As part of this review, the committees shall review fund balances for particular fees and ensure that the funds generated are used for their approved purpose.

7.2- Sunset of Course Fees: Course fees and program fees shall be repealed after a period prescribed by the institution's policy if not reviewed and renewed by the course and program fee committee.

7.3- Notice to Students: Institutions shall include information about approved course and program fees in each academic term's schedule available to students prior to registration. Any

changes to course and program fees must be approved and published in the schedule for the academic term in which the change shall be effective. Only course and program fees included in the schedule shall be assessed for the academic term.

7.4. Assessing Fees: Institutions shall assess course and program fees subject to the same billing, refund, and collections process as tuition and shall be accounted for through institutionally-authorized student and financial systems. [Technical colleges may, at their discretion, implement a policy to waive fees for secondary students who receive fee waivers at their high school.](#)

7.5. Allocating Fees: Institutional course and program fees shall be allocated for the approved purpose and accounted for within the institution's financial system in a manner to facilitate audit verification.

7.6. Board of Trustees Oversight and Review: The institution's board of trustees shall at least annually review the recommendations of the institution's course and program fee committee for requests to establish, revise, or repeal course and program fees.

R517-8. Periodic Audit Review: -Institutional or system internal auditors shall periodically review a sample of the institutions' course and program fees for compliance with this policy.



R517, Course and Program Fees¹

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R517-2 References

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Course fees and program fees may be instituted to cover direct costs essential to the educational outcomes for specific course or program offerings, and often include materials that cannot be purchased by individual students or for which bulk purchases reduce the cost to students. Such direct costs include course materials, chemicals, tooling, uniforms, laundry, testing, off-site instructional activities, supplies used in instruction; instructional equipment; student licensure and certifications; maintenance of laboratory equipment, computer software, subscriptions or transportation in which the entire class participates.

¹ Adopted: May 21, 2021; amended XXX.

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5.2 Institutions may not charge course or program fees for costs that are incurred across all programs or courses.

5.3 Course and program fees should recover costs when no other dedicated funds are available for that purpose.

5.4 Institutions should set course and program fees based on the cost of the activity or service for which the fee is levied.

5.5 Institutions may use course and program fees only to support the activity or service for which the fee is being charged.

5.6. Institutions shall track and account course and program fees in such a way that the proper use of revenue can be evaluated or audited.

5.7 With the exception of equipment replaced on a rotating schedule, course and program fees shall be used each academic period for the benefit of the students who paid the fees.

5.8 Course and program fees shall not be used to pay instructional services rendered by faculty, staff, and teaching assistants. Exceptions may include special instructional arrangements such as private music, aviation, clinical, and tutors.

5.9 Course and program fees should not be used to pay for materials that can be purchased directly by students through campus stores or other approved institutional entities.

Exceptions to these general principles shall be documented by the institution and reviewed periodically by the institution's course and program fee committee.

R517-6 Delegation of Authority to Establish Course Fees: The Board delegates to the boards of trustees the responsibility to review, approve, adjust, and repeal course fees and program fees.

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7.1 Institution Course and Program Fee Committee: Each institution shall establish a course and program fee committee, which shall oversee the establishing, revising, maintaining, or repealing course and program fees.

7.1.1 Appointment and Procedures of the Committee: Each institution will adopt policies and procedures for appointing members of the course and program fee committee and for the operation of the committee consistent with this policy.

7.1.2 Student Participation in the Committee: Institutions shall invite student participation in the course and program fee committee.

7.1.3 Duties of the Committee: The course and program fee committee shall ensure that course fees and program fees are justifiable, reasonable, and necessary for the specific course or program for which they are proposed.

7.1.3.1 The institutional course and program fee committees shall review all proposals to establish new course and program fees to ensure the proposals meet the general principles of this policy and are supported by a demonstrated need, a clear statement describing the purpose of the fee, and a sound budget plan. If the committee determines the proposed fee meets these criteria, it may forward the proposal to the board of trustees. The board of trustees shall review the proposed fee in accordance with the criteria in this policy and the institution's program and course fee policy and, if satisfied, may approve the new fee.

7.1.3.2 Institutional course and program fee committees shall review all proposed course and program fee revisions with their associated revised budget plans and evaluate the rationale for the proposed change.

7.1.3.3 Each institution's course and program fee committee shall review each course and program fee at least once every three years to ensure the fee still meets established objectives. As part of this review, the committees shall review fund balances for particular fees and ensure that the funds generated are used for their approved purpose.

7.2 Sunset of Course Fees: Course fees and program fees shall be repealed after a period prescribed by the institution's policy if not reviewed and renewed by the course and program fee committee.

7.3 Notice to Students: Institutions shall include information about approved course and program fees in each academic term's schedule available to students prior to registration. Any

changes to course and program fees must be approved and published in the schedule for the academic term in which the change shall be effective. Only course and program fees included in the schedule shall be assessed for the academic term.

7.4 Assessing Fees: Institutions shall assess course and program fees subject to the same billing, refund, and collections process as tuition and shall be accounted for through institutionally-authorized student and financial systems. Technical colleges may, at their discretion, implement a policy to waive fees for secondary students who receive fee waivers at their high school.

7.5 Allocating Fees: Institutional course and program fees shall be allocated for the approved purpose and accounted for within the institution's financial system in a manner to facilitate audit verification.

7.6 Board of Trustees Oversight and Review: The institution's board of trustees shall at least annually review the recommendations of the institution's course and program fee committee for requests to establish, revise, or repeal course and program fees.

R517-8 Periodic Audit Review: Institutional or system internal auditors shall periodically review a sample of the institutions' course and program fees for compliance with this policy.



September 16, 2022

Shared Services

“Maximizing efficiency throughout the Utah System of Higher Education by identifying and establishing administrative shared services” was among the charges the Utah Legislature gave to the newly combined System established in 2020. The Legislature provided funding to the System in 2021 to study administrative functions at all 16 USHE institutions.

The System used legislative funding to engage with Huron Consulting Group to explore, identify, and assess achievable opportunities for creating common System processes and improved shared services in the context of institutional mission and culture.

Huron completed its study earlier this year, identifying approximately 50 opportunities for shared services within, among regional groups, and across all institutions. The report also provides a framework for goals, strategies for success, and core enablers of shared services.

Goals	Strategies for Success	Core Enablers
Increase Efficiency	Technology Enablement	System Governance
Risk Mitigation	Process Improvement	Policy Standardization
Financial Sustainability	Policy Standardization	Technology Consistency
		Process Redesign

Commissioner’s Recommendation

The Commissioner recommends the Board work towards implementation of shared services by:

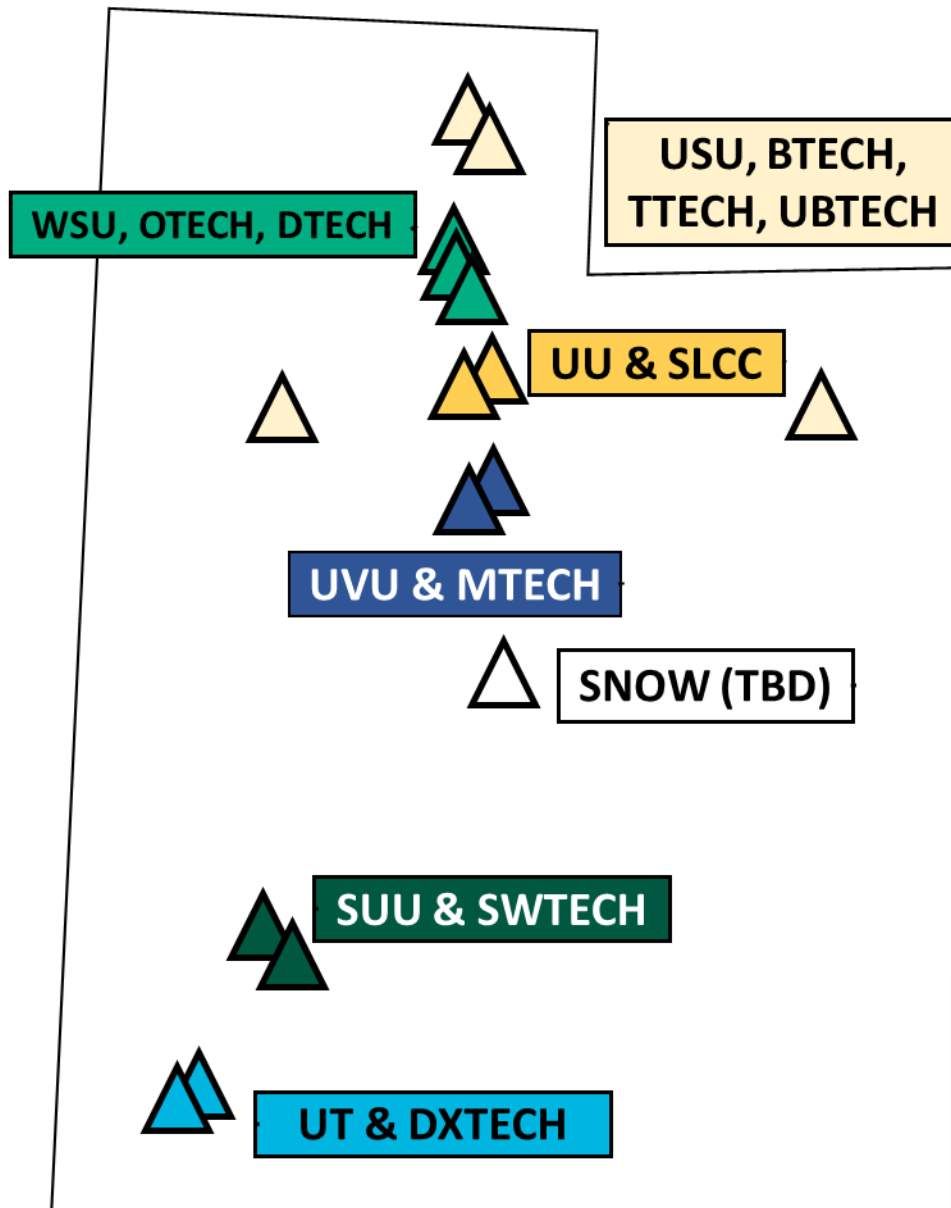
1. Adopting regions for shared services
2. Establishing initial guidelines for implementation
3. Instructing the Commissioner’s office to coordinate a task force to develop relevant policies and procedures, prioritize opportunities, and make recommendations to the Board.

Attachments



UTAH SYSTEM OF
HIGHER EDUCATION

Proposed Regions for Shared Services



(Not to scale.)



Phase 2 Report

USHE Shared Services Study



January 5th, 2022

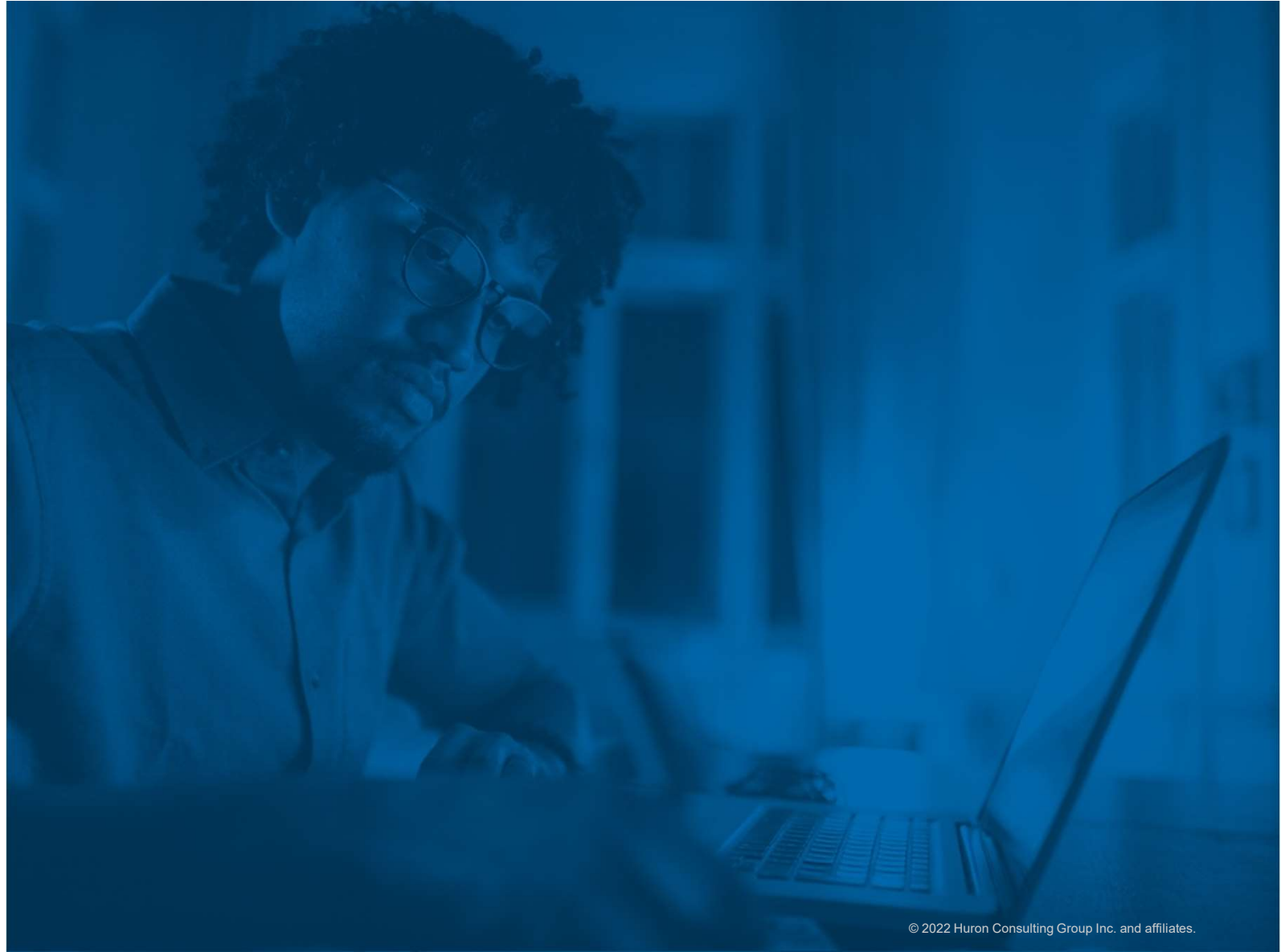
huronconsultinggroup.com

Agenda

1. Executive Summary
2. Menu of Opportunities
3. Organizational Risk & Readiness Assessment (ORRA)
4. Next Steps

1

Executive Summary



USHE Shared Services Study Goals

The subsequent analyses and opportunities are grounded in the Shared Services Study's goals, which USHE has purposefully defined as extending beyond cost reduction opportunities.

GOALS

INCREASE EFFICIENCY

Identify opportunities to enhance the effectiveness, speed, or quality of service delivery to create more direct and intentional resource use.

RISK MITIGATION

Identify opportunities to create structured compliance and minimize risk exposure to increase security in a challenged environment.

FINANCIAL SUSTAINABILITY

Identify opportunities to stabilize resource use, decrease costs, and improve overall financial stability.

STRATEGIES FOR SUCCESS

TECHNOLOGY ENABLEMENT

Updated and automated processes increase trust in data and decrease manual effort, which results in greater efficiency and increased capacity.

PROCESS IMPROVEMENT

Minimizing outdated and redundant processes will increase efficiency and allow institutions to focus on more mission-driven activity.

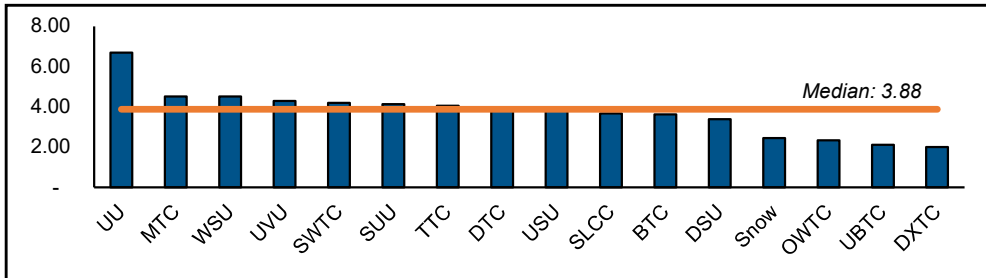
POLICY STANDARDIZATION

Standardization of processes and policies ensures compliance and minimizes the risks that can arise in a more distributed operating setting.

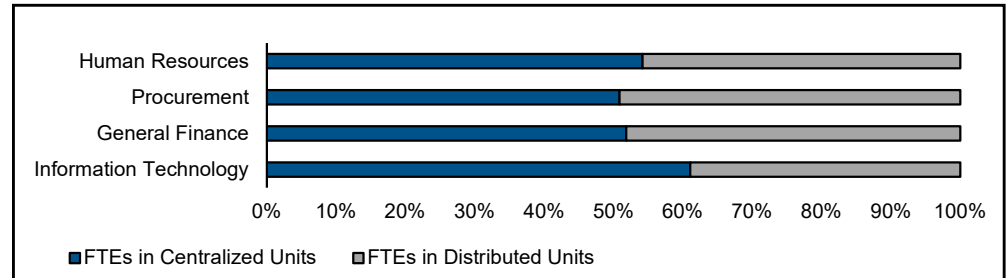
Phase 1 Overview

During Phase 1, the project team collected information through interviews and various data survey tools and found operational inefficiencies that can be addressed through shared services.

Scale: Administrative support is inconsistent.



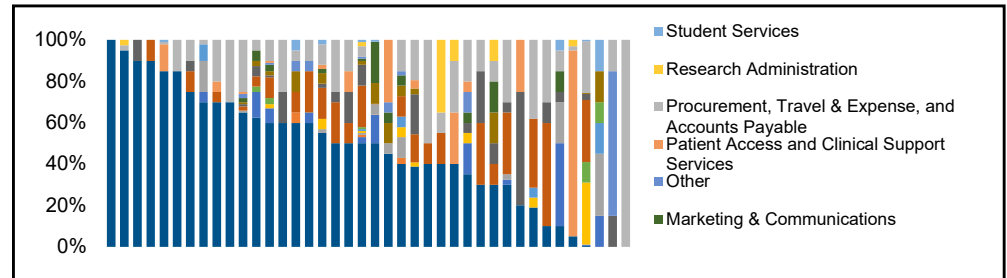
Distribution: Administrative services are often decentralized.



Operating Profiles: Institutions have unique operating profiles.

Institution Type	General Finance	HR	IT	Procurement
Total Four-Year FTE	630.5	378.6	905.1	402.3
Range	8.5 – 338.1	7.7- 191.2	11.3 – 501.9	5.7 – 190.3
Total Two-Year FTE	71.4	46.4	52.7	41.9
Range	1.0 – 41.1	1.4 – 31.2	1.6 – 22.5	1.0 – 23.4
TOTAL FTE	701.9	425.0	957.8	444.2

Fragmentation: Job duties are fragmented and inconsistent.



Note: For additional detail and sources regarding the information on this slide, please refer to the Phase 1 presentation, included in appendix B.

Meeting Objectives

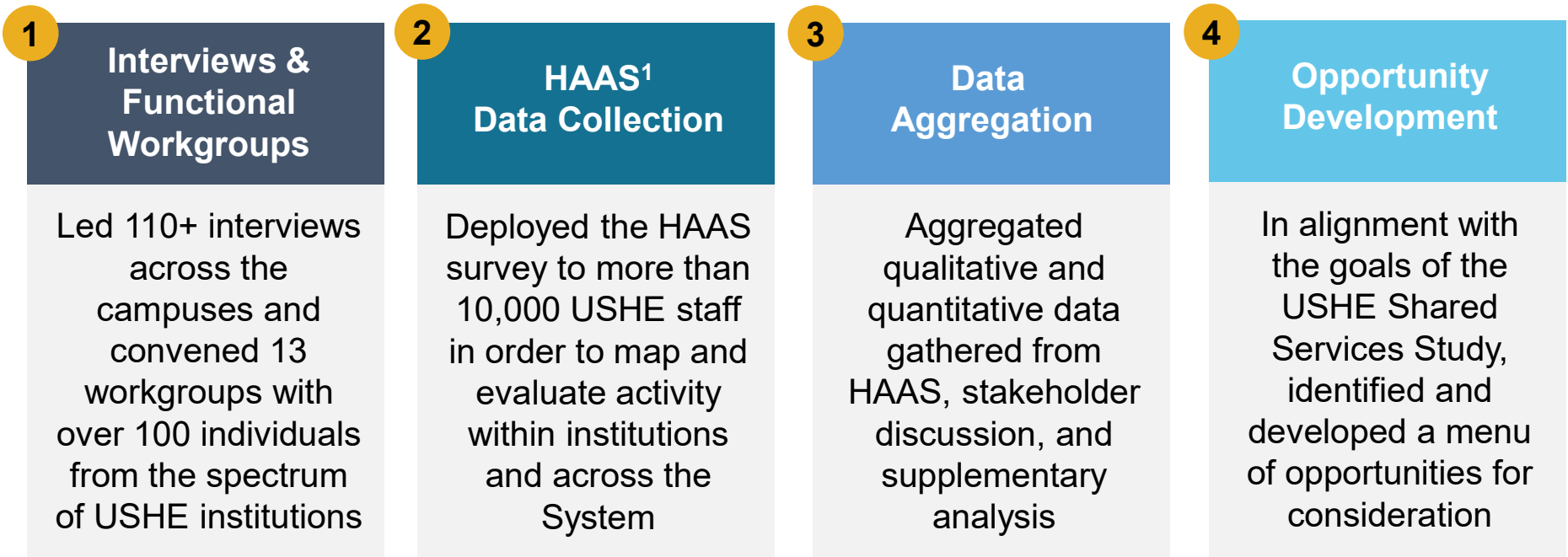
This report provides a detailed identification of opportunities accompanied by supporting analysis, project context, and discussion of next steps.

In this meeting we will:

- Present opportunities identified at the local, group, and system level for the four in-scope areas (human resources, finance, procurement, information technology)
- Facilitate a discussion on change readiness in the context of these opportunities and gain perspective on what obstacles and elements may impact implementation consideration
- Establish next steps and Phase 3 activities, which include more detailed cost benefit analysis of select opportunities

Opportunity Development

The opportunities presented in this report were developed through the synthesis of both qualitative and quantitative analysis and grounded by consistent stakeholder engagement.



Note: ¹HAAS or the Huron Administrative Activity Study is a survey tool that captures employee administrative effort across a population

Scale of Opportunities

Huron identified opportunities at varying levels of the USHE organizations, which have been categorized as local-level, group-level, and/or systemwide.

LOCAL



- The opportunity is institution-specific and does not require action outside of a singular institution
- Local opportunities lessen barriers to change in comparison to multi-institutional initiatives
- Local opportunities can potentially be at odds with group or system opportunities depending on their focus

GROUP



- The opportunity involves two or more institutions but does not comprise the entire system
- Group opportunities can leverage the similarities between a subset of institutions that may not be present across all 16
- Group opportunities may create resistance as some, but not all, institutions undergo change

SYSTEM



- The opportunity involves all 16 USHE institutions and is implemented systemwide
- System opportunities present the highest potential for widespread financial and operational improvement
- System opportunities will require substantial pre-work, whether technological or operational, prior to implementation

Foundations of 'System' Opportunities

Achieving efficiencies of scale at the System level will often require harmonizing, simplifying, and creating interoperability with data structures, policies, practices, and supporting technologies.

Core Enablers of Systemwide Collaboration

DATA STRUCTURES

- Chart of Accounts
- Job Classifications
- Job Actions/Reasons
- Salary Structures
- Earnings Types/Codes

POLICY & PRACTICE

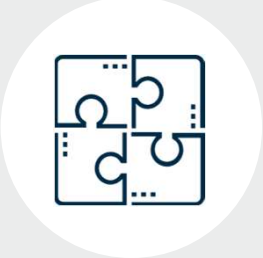
- Administrative Calendars
- Time and Leave
- Pay Schedules
- Salary Structures
- Benefit Structures
- Governance & Oversight

TECHNOLOGY


- Reporting & Business Intelligence
- Case & Service Management
- Data Warehouses
- ERP & Ancillary Systems

Categorization of Opportunities

Opportunities will then fall into one of five categories that help to frame the fundamental goal of each initiative and what kind of change is required.




CORE SHARED SERVICES
Opportunities focused on consolidating distributed activity into a centralized shared service center




CENTERS OF EXPERTISE
Opportunities focused on specialized unit(s) that provide shared support for specific, often niche areas



TIER 1
Opportunities focused on developing customer-facing units to serve on the frontline fielding general questions



TALENT & CULTURE
Opportunities focused on improving human capital through role standardization, reporting lines, or career pathways

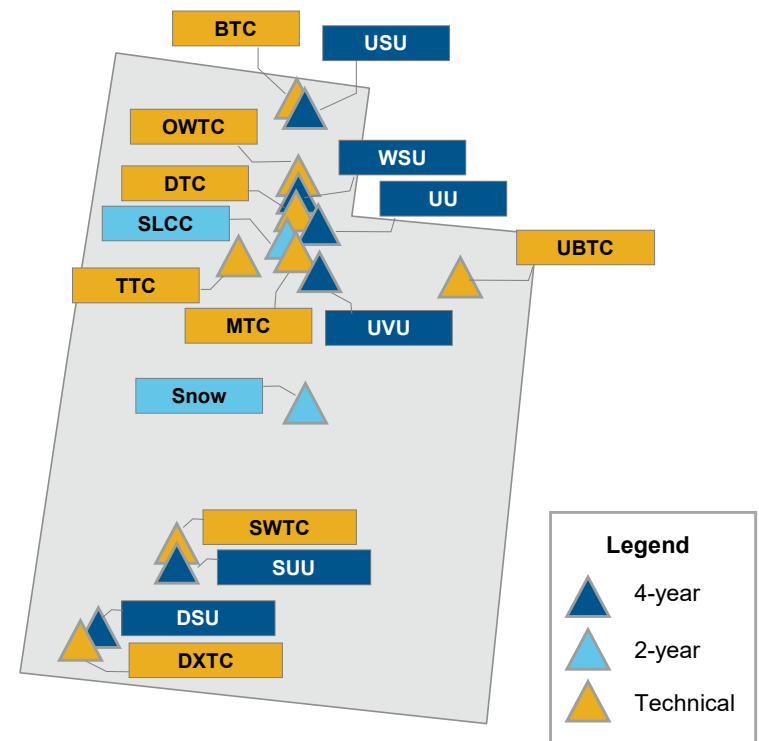


FOUNDATIONAL
Opportunities that serve as a springboard for future technological or operational collaboration across multiple institutions

Opportunities & Regionality

In addition to scale and category, Huron also approached group opportunities with considerations of regionality. While remote work has reduced barriers, geography remains an important factor.

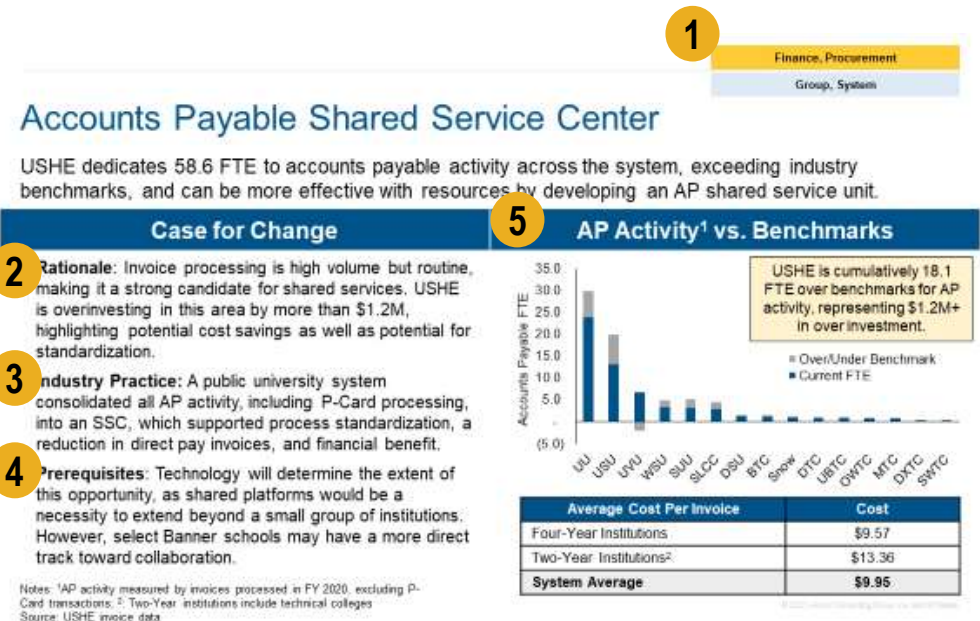
- USHE is comprised of 16 institutions across Utah that have **discrete pockets of institutional density** in various regions.
- In Huron's experience, regionality can be a key consideration in multi-institution shared services, which often improves **the ease of implementation and adoption**.
- For select opportunities included in this report, **regionality may be a critical element in next step design activities**, particularly those that are inclusive of a large set of USHE institutions.
- While Huron's opportunities were developed with this framework in mind, **more detailed regionality elements** will be integrated during any subsequent design phase.



Opportunity Layout

Each slide includes a case for change, supporting analyses, industry practice, and anticipated prerequisites.

- 1 **Scale & Area:** Details the functional area(s) and applicable scale of the opportunity
- 2 **Rationale:** Outlines the core rationale for pursuing the described opportunity
- 3 **Industry Practice:** Provides peer or industry insights related to the described opportunity
- 4 **Prerequisites:** Describes key activities that must be completed in order to pursue the implementation of the described opportunity
- 5 **Supporting Analysis:** Qualitative or quantitative analysis further supporting the described opportunities



Opportunity List

Core Shared Services (1/2)

	Opportunity Scale			HR	Finance	Procurement	IT
Accounts Payable Shared Service Center		Group	System		✓	✓	
Travel and P-Card Processing	Local	Group	System		✓	✓	
Shared Benefits Plans		Group	System	✓			
Payroll Shared Service Center		Group		✓	✓		
Payroll Outsourcing	Local	Group	System	✓	✓		
System Accounting Services		Group	System		✓		
Internal Audit and Enterprise Risk Management		Group	System		✓		
Strategic Sourcing		Group	System			✓	

Opportunity List

Core Shared Services (2/2)

	Opportunity Scale			HR	Finance	Procurement	IT
Align Local and Central Treasury Resource Support	Local	Group	System		✓		
Refine Treasury Operating Model	Local	Group	System		✓		
Website Development & Maintenance	Local	Group					✓

Opportunity List

Centers of Expertise

	Opportunity Scale			HR	Finance	Procurement	IT
Security Operations Center		Group	System				✓
Data Analytics and Reporting			System				✓
Onboarding & Experience Program	Local	Group		✓			
Employment Law		Group	System	✓			
Procurement Operating Model		Group	System			✓	
Performance Management		Group	System	✓			
Project Management Office (PMO)	Local	Group	System	✓	✓	✓	✓

Opportunity List

Tier 1

	Opportunity Scale			HR	Finance	Procurement	IT
Help/Service Desk	Local	Group	System				✓
Travel Support Center		Group	System		✓	✓	
Benefits Administration	Local	Group	System	✓			

Opportunity List

Talent & Culture

	Opportunity Scale			HR	Finance	Procurement	IT
Leave Policy Standardization	Local	Group	System	✓			
Centralized Recruitment Operations	Local	Group		✓			
Increase Managerial Spans of Control	Local			✓	✓	✓	✓
Talent Acquisition Collaborative		Group	System	✓			

Opportunity List

Foundational Opportunities

	Opportunity Scale			HR	Finance	Procurement	IT
System Policy Framework			System	✓	✓	✓	✓
Standardize Procurement Platforms		Group	System		✓	✓	
Chart of Accounts Standardization		Group	System		✓	✓	
Compensation & Classification	Local	Group	System	✓			
Systemwide ERP			System	✓	✓	✓	✓

Opportunity List

Local Opportunities (1/3)

	Institution	HR	Finance	Procurement	IT
Embedded HR Model	UU	✓			
Academic Advising	UU	✓	✓		
Increase Centralized Procurement	UVU			✓	
Centralize Select Finance Activities	WSU		✓		
Project Management Office	DTC	✓	✓	✓	✓
Finance Training	BTC		✓		
Standardize & Specialize Roles	DXTC	✓	✓	✓	✓
Reporting Relationships	DSU	✓	✓	✓	✓

Opportunity List

Local Opportunities (2/3)

	Institution	HR	Finance	Procurement	IT
IT Centralization	SLCC	✓	✓	✓	✓
Database Administration	SUU				✓
Project Management Office	SWTC	✓	✓	✓	✓
Procurement Centralization	UBTC			✓	
IT Service Delivery	USU				✓
Budgetary Support	Snow		✓		
IT Investment	TTC				✓
Transactional Activity	MTC		✓		

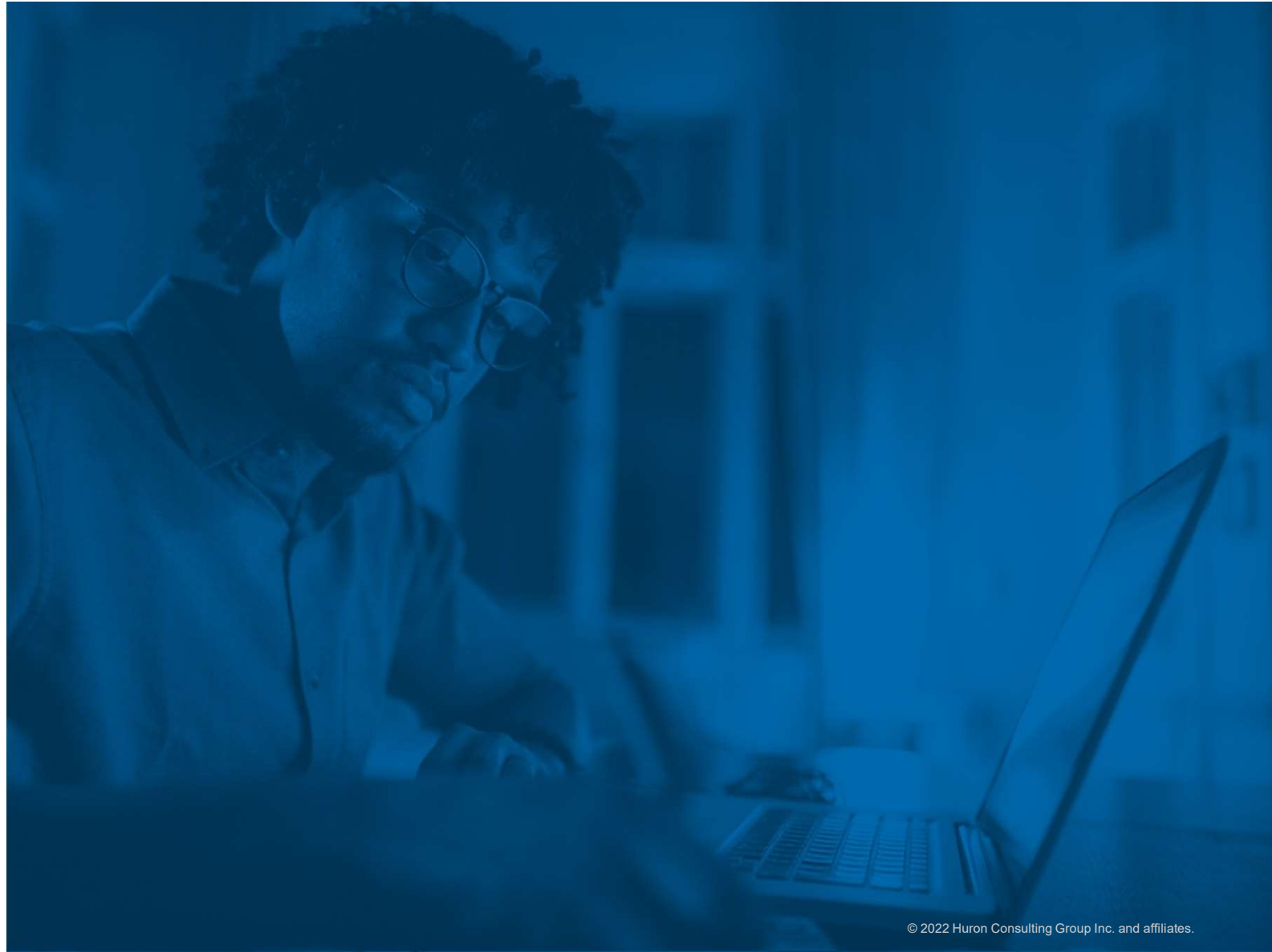
Opportunity List

Local Opportunities (3/3)

	Institution	HR	Finance	Procurement	IT
Finance Specialization	OWTC		✓		

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Core Shared Services



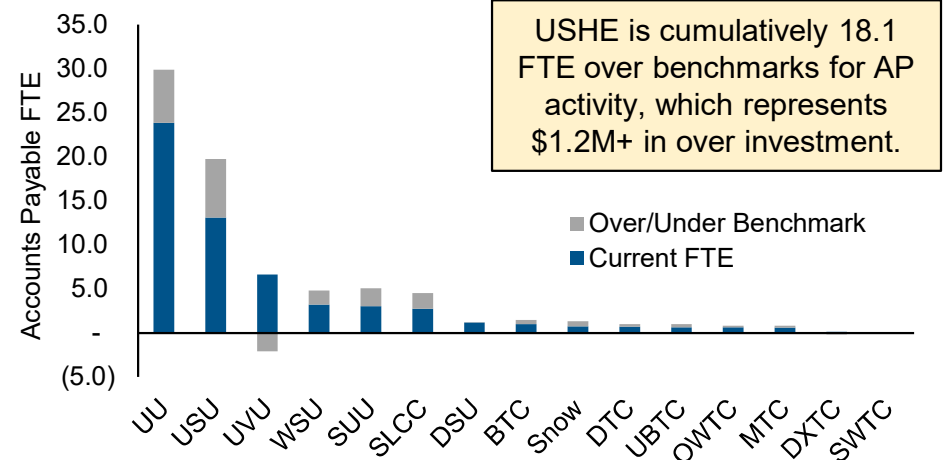
Accounts Payable Shared Service Center

Invoice and payment processing is a high-volume but routine activity which makes it a strong candidate for shared services.

Case for Change

- **Rationale:** USHE dedicates 58.6 FTE to accounts payable activity across the System and exceeds industry benchmarks by more than \$1.2M in cost, which highlights potential cost savings and standardization opportunities.
- **Industry Practice:** A public university system consolidated all AP activity, including P-Card processing, into an SSC, which supported process standardization, a reduction in direct pay invoices, and financial benefit.
- **Prerequisites:** Technology will determine the extent of this opportunity, as shared platforms would be a necessity to extend beyond a small group of institutions. However, select Banner schools may have a more direct track toward collaboration.

AP Activity¹ vs. Benchmarks



Average Cost Per Invoice	Cost
Four-Year Institutions	\$9.57
Two-Year Institutions ²	\$13.36
System Average	\$9.95

Notes: ¹AP activity measured by invoices processed in FY 2020, excluding P-Card transactions; ²Two-Year institutions include technical colleges
Source: USHE invoice data; benchmarking data per APQC report

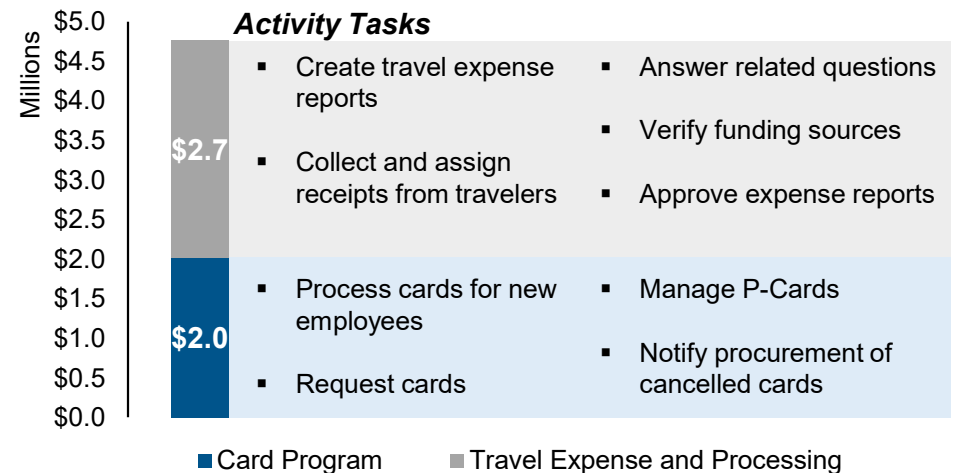
Travel and P-Card Processing

Centralizing travel-related and P-Card processing in a singular unit can reduce the administrative burden placed on campus administration and free up critical employee capacity.

Case for Change

- **Rationale:** Travel and P-Card processing is transactional work that costs approximately \$4.8M in annual expense. A central office would reduce the administrative burden on campuses, where 24% of all related effort is delivered by employees with manager or director level titles.
- **Industry Practice:** Several university systems use central units for travel, T-Card, and P-Card processing. The University of Illinois System uses a web-based system for managing both processes and related areas and reconciles the activity from the system office.
- **Prerequisites:** In order to maximize efficiency, there would be a review of policies and procedures and a consideration of technology investment to streamline expense submission for processing.

Travel and P-Card Expenditures



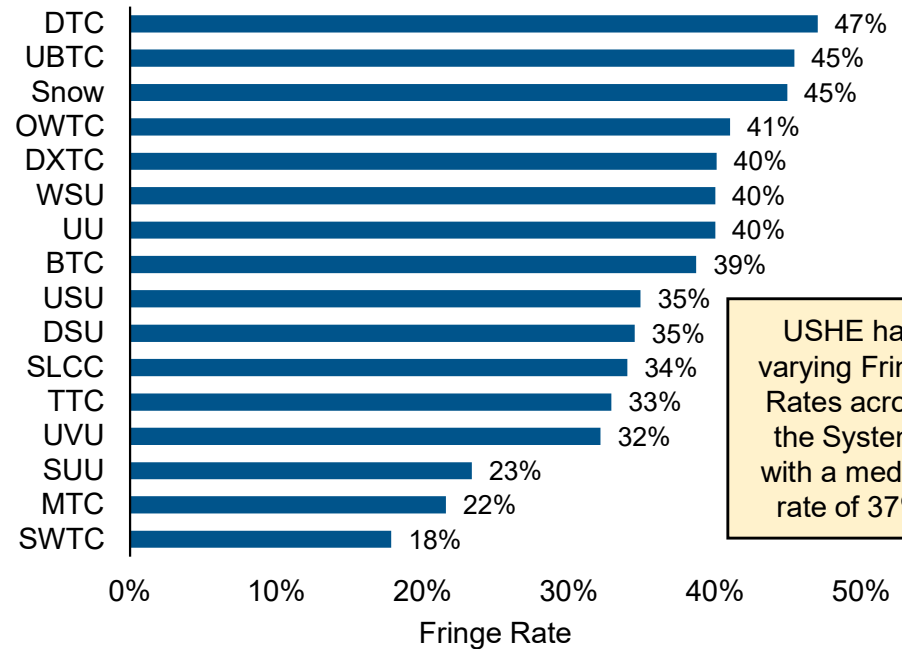
Employees with manager or director level titles currently spend **\$1.5M** on travel and expense and administering card programs related to travel and expense.

Shared Benefits Plans

USHE can reduce inconsistency and improve employee satisfaction by implementing shared benefits plans that start with a focus on supplementary benefits and ramp up to health and retirement.

Case for Change | USHE Fringe Rates²

- **Rationale:** USHE spends \$450.3M¹ on benefits and lacks any shared benefit plans. Implementing common benefits across the System, such as a shared EAP or supplemental benefits, will increase systemwide collaboration and open the door to bigger opportunities, such as health and retirement benefits.
- **Industry Practice:** The University System of New Hampshire has a shared EAP and a voluntary benefit coverage for disability insurance. All benefits-eligible employees throughout the System can enroll in the plans.
- **Prerequisites:** Current benefit plans would be inventoried with resources made available to employees to navigate any changes in administration and to ensure a high level of customer service.



Source: ¹USHE Financial Expenditures by Year

Note: ²Select institutions do not utilize official fringe rates; in those instances, fringe was estimated from total cost of benefits and compensation taken from the institutions' financial statements.

Payroll Shared Service Center

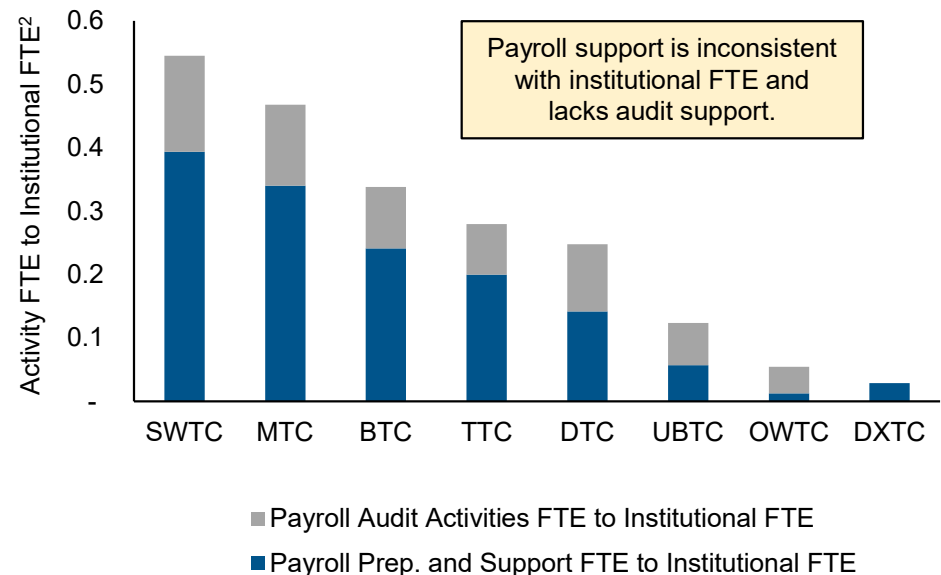
USHE can increase efficiency, reduce risk, and improve service through the implementation of a payroll shared service center across its technical colleges.

Case for Change

- Rationale:** USHE Technical Colleges invest 3.3 FTE in payroll activities, which highlights the area as under resourced; only MTC contributes more than one FTE.
 - In areas related to payroll reconciliation and audit, technical colleges cumulatively contributed just 1.1 FTE. This creates risks for over and underpayments, tax regulation compliance, and business continuity.
- Industry Practice:** USNH created a payroll shared service center to align staffing with benchmarks and standardizing processes systemwide.
- Prerequisites:** In advance of implementation, there would need to be a standardization and mapping of processes to align institutions with the new structure¹.

Note: ¹This effort would include identification of check printing and direct deposit capabilities, banking partners, and other relevant areas; ²Institutional FTE in hundreds

Technical College Investment in Payroll



Payroll Outsourcing

Outsourcing payroll activities across the System could achieve approximately \$600K in annual savings while standardizing and improving service levels.

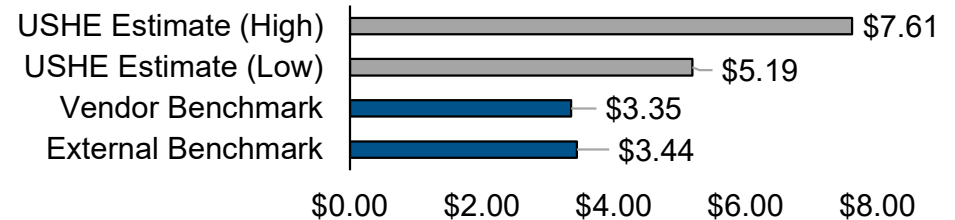
Case for Change

- Rationale:** USHE institutions invest approximately \$3.9M and 46.3 of FTE annually in payroll processing and is over double applicable benchmarks in cost per paycheck.
 - Outsourcing pay calculations, distribution, tax remittances, etc. can improve and standardize service quality, which varies cross the System, with some institutions lacking the resources for industry standard levels of service.
- Industry Practice:** While many institutions, such as CU Boulder and the USG System outsource elements of payroll, higher education has resisted full outsourcing.
- Prerequisites:** Successful outsourcing is dependent on the partner selected and System decision making on levels of customization and standardization.

Sources: Internal benchmarks, prior client vendor benchmarking, estimates based on extrapolation of internal reference data

Cost Overview

Cost per Paycheck



Institution	Total
USHE Payroll Processing Spend	\$3.9M
Estimated Annual Vendor Cost	\$3.3M
Estimated Annual Savings	\$600K

Range does not include implementation expenses

System Accounting Services

By providing general accounting services to each institution, USHE could improve financial controls and help create efficiencies in processing activities.

Case for Change	Finance Function Activities		
	Level of Complexity		
	Processing	Technical	Strategic
<ul style="list-style-type: none"> ▪ Rationale: General accounting costs USHE \$12.1M and 150.7 FTE per year. The work is mainly processing activities, such as journal entries and reconciliation work, that can be performed with efficiency at scale and would give the System Office increased insights into financial activity across the System. ▪ Industry Practice: USNH centralized all general accounting activities across the state into a central office, with campuses experiencing no noticeable disruptions in service and increases in employee processing efficiency. ▪ Prerequisites: A unified chart of accounts and financial systems help to achieve optimal efficiency while detailed process mapping, identification of services provided, and policy controls are necessary to shift the activity to the shared service center. 	<div style="border: 1px solid orange; padding: 5px;"> General Accounting Cost: \$12.1M </div>	<div style="border: 1px solid #ccc; padding: 5px;"> Reporting and Data Management Cost: \$7.3M </div>	<div style="border: 1px solid #ccc; padding: 5px;"> Financial Analysis and Reporting Cost: \$12.6M </div>
	<div style="border: 1px solid #ccc; padding: 5px;"> Billing and Receivables Cost: \$12.1M </div>	<div style="border: 1px solid #ccc; padding: 5px;"> Systems Administration Cost: \$2.0M </div>	<div style="border: 1px solid #ccc; padding: 5px;"> Budgeting, Treasury, Financial Management Cost: \$11.2M </div>
	<div style="border: 1px solid #ccc; padding: 5px;"> Patient Accounting Cost: \$1.1M </div>		

➔ General accounting represents the highest cost finance activity in the least complex area

Note: Activity boxes are illustrative and are not scaled to size

Internal Audit and Enterprise Risk Management

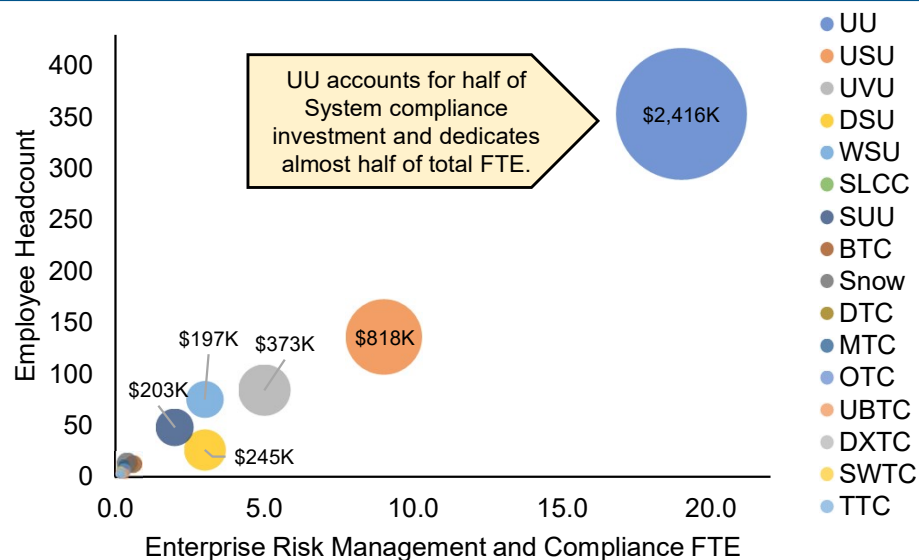
Operating enterprise risk management and compliance as a shared service will mitigate audit risks by ensuring that processes are consistently and appropriately monitored.

Case for Change

- **Rationale:** Over 800 employees systemwide perform compliance related activity, which results in unspecialized and distributed processes and greater exposure to risk. Consolidating risk management will create specialists dedicated to risk management and provide the necessary resources to ensure compliance across the System.
- **Industry Practice:** At the University of California system, a central risk management office was implemented to identify and manage potential risks across the System.
- **Prerequisites:** Institutions have varying financial processes which would need to be standardized before engaging in centralization. Capacity is also low across the System, which prompts consideration of resourcing and strategic investment.

Note: Size of bubble reflects total institutional spend on compliance related activity

Institutional Investment in Compliance



9 of the 16 institutions within USHE dedicate less than 1 FTE and invest less than \$100,000 in compliance.

Strategic Sourcing

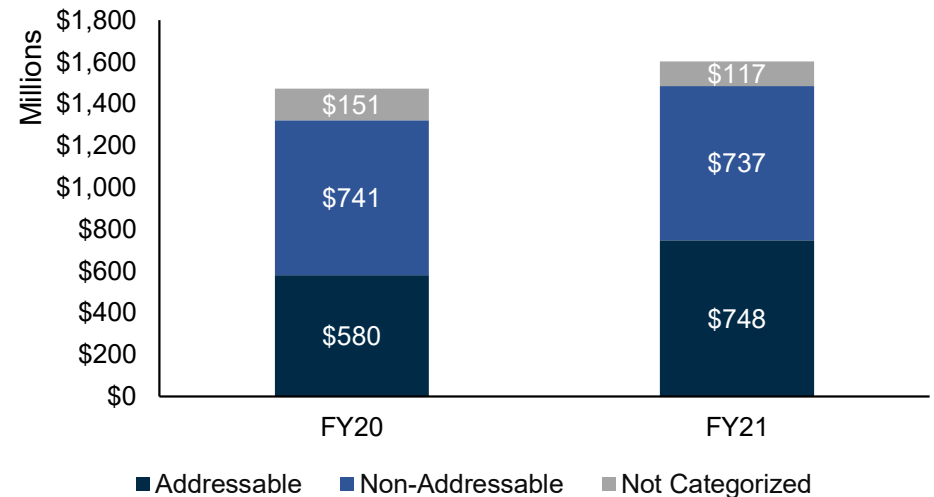
Initial analysis of 4 representative USHE institutions had an estimated \$1,602M in FY21 vendor spend, about \$748M of which can potentially be addressed by sourcing activities to decrease future spend.

Case for Change

- **Rationale:** Cleansed, standardized, and categorized FY20 and FY21 spend reveals that 13% of FY21 addressable spend is with suppliers used by all four institutions. An estimated \$6M-\$12M in cost savings opportunities can be achieved through sourcing activities to include leveraging buying power, demand management, and utilization of contracts.
- **Industry Practice:** Various universities and university systems have implemented strategic sourcing opportunities to yield potential cost savings as well as create more efficient procurement processes.
- **Prerequisites:** Each institution has varying contract review processes which will require further discussion in determining how to develop a sourcing savings roadmap.

Source: ¹FY20, FY21 Invoice and P-card data UU, USU, SLCC, and DTC




Estimated FY20, FY21 Spend¹



FY21 Addressable Spend ~\$748M; 93% categorized.

Align Local and Central Treasury Resource Support

USHE can optimize local cash and treasury support for its 16 institutions by standardizing roles and right-sizing consistent levels of support across the institutions.

Case for Change	Recommended Staffing Considerations	
<ul style="list-style-type: none"> ▪ Rationale: Schools and colleges have autonomy to decide how to organize cash and treasury management responsibilities. Staffing levels should align with the current volume of treasury transactions, current technologies in place, and balance risks of the schools and colleges. Furthermore, roles should be standardized to provide adequate levels of support. ▪ Industry Practice: Best practice entails a system-level treasurer overseeing and maintaining all key bank relationships and setting which services are managed centrally vs. locally. This can increase financial controls, limit fraud risks, and consolidates banking relationships. ▪ Prerequisites: USHE would require governance restructuring to implement shared treasury support. 	Areas for Consideration when Choosing a Support Model:	Staffing Efficiency Conservative Optimal
	Are cash/ treasury processes manual or inefficient ?	 Higher levels of automation lead to more efficient staffing (lower FTEs)
	Are cash/ treasury specialists focused only on cash/ treasury processes or generalists with a boarder scope of responsibilities (e.g. purchasing, HR, payroll)?	 Limiting scope of services leads to more efficient staffing (lower FTEs)
Is the support model/staff new or in a pilot phase as processes, and roles and responsibilities are being standardized?	 As the organization matures and staff are fully trained, the staffing model becomes more efficient (lower FTEs)	

Refine Treasury Operating Model

USHE can enhance its treasury operations' value-proposition by shifting focus from 'traditional' to 'leading' activities across key treasury functions.

Case for Change	Operating Model & Activity Indicators		
	Traditional	Strategic	Leading
<ul style="list-style-type: none"> ▪ Rationale: Shifting from traditional to leading practices either at the local, group, or system-level will enable USHE to optimize cash and treasury services to increase functionality, reduce banking and staffing costs, and increase USHE's sophistication with money management. 	Ad hoc; limited tracking & reporting	Visibility and tracking of relationships	Optimized relationships based on functionality, needs, & costs
<ul style="list-style-type: none"> ▪ Industry Practice: Industry leading practices have optimized banking relationships that provide services at the lowest possible cost, automated technologies for effective cash rebalancing, investing, and reporting, and structures to manage risk. 	Limited awareness of total bank fees & services	Awareness of total cost of banking relationship	Periodic review & re-balance of banking services
<ul style="list-style-type: none"> ▪ Prerequisites: Per the level of centralization, governance models may need to be revised. Business processes and banking partners will be compiled for review. 	Periodic review and rebalancing of cash investments	Robust cash investment policies and daily or weekly manual rebalancing	Automated rebalancing & cash investment to accounts
	Limited awareness & visibility of cash; manual reporting	Identified KPIs that align with cash investment policy	Automated cash reporting and visibility for mgmt.
	Limited awareness & manual processes	Partial automation, limited systems integration	Automated & integrated processes across systems

Website Development & Maintenance

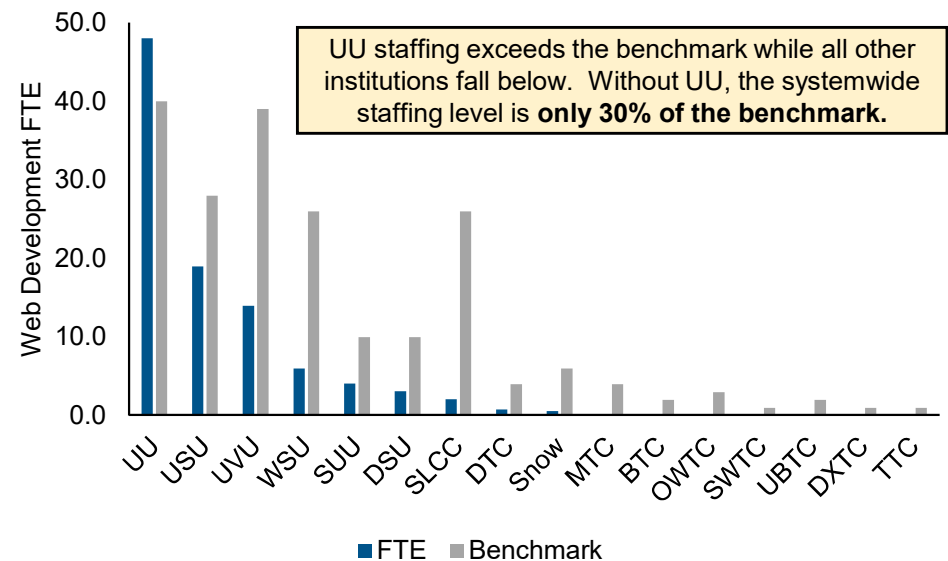
USHE institutions should develop an internal service center for website development & maintenance to alleviate a top source of employee frustration and improve internal and external effectiveness.

Case for Change

- **Rationale:** Website development and maintenance often spans technical, inward-facing IT processes and outward-facing marketing (or similar) requirements. Centralizing and streamlining the technical processes can provide more consistent service to the institutions.
- **Industry Practice:** Many institutions have adopted robust content management systems along with content governance structures which allows for monitoring of website performance and enforcement of policies with respect to accessibility, privacy, and security.
- **Prerequisites:** In addition to standard content, each institution will have individual needs that must be included in the content governance structure to assure that web content changes can be made in a timely manner.

¹ Source: IT Staffing Ratios, Computer Economics, 2020.

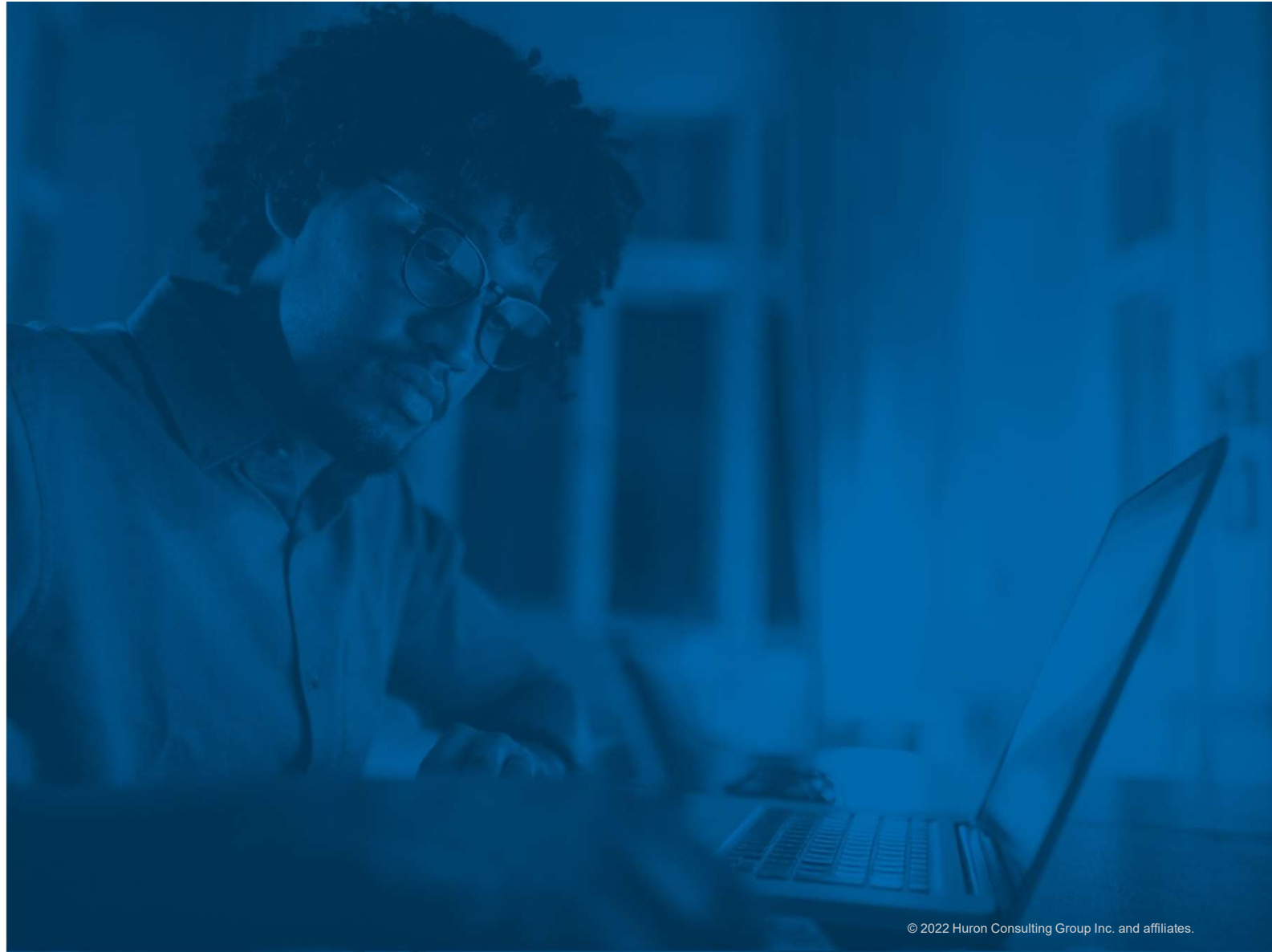
Web Development FTE vs. Benchmark¹



The OFI identified website development technology and process as critical areas for improvement.

2b

Centers of
Expertise



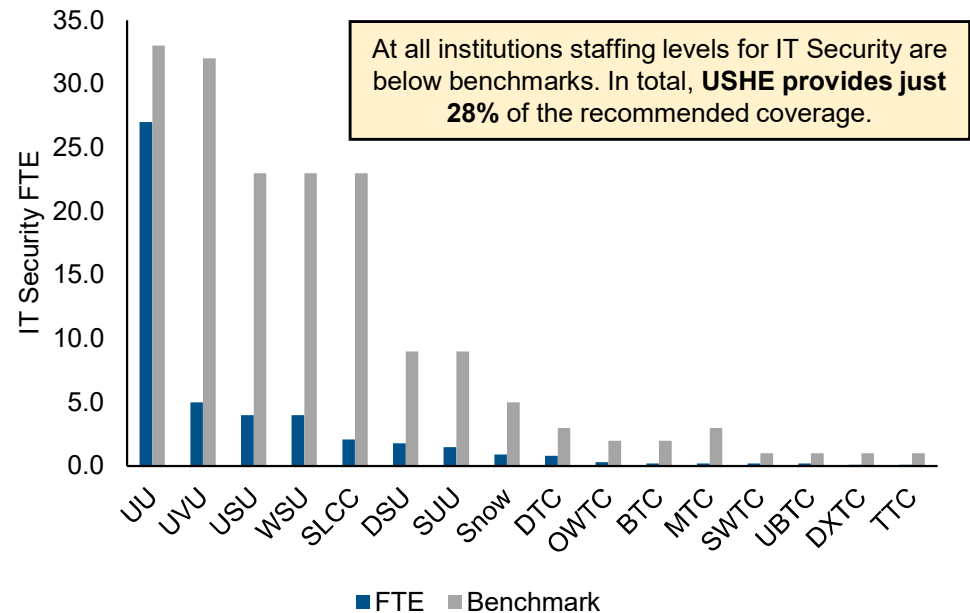
Security Operations Center

USHE currently combats security threats at an institution-level, which has led to past ransomware attacks. Creating a Security Operations Center will help reduce vulnerability and mitigate risks.

Case for Change

- **Rationale:** A systemwide Security Operations Center (SOC) mitigates the needs for institutions to fund and build out operations themselves. Leveraging the UETN, implementation may be streamlined to increase efficiencies and assist in the avoidance of potential security breaches.
- **Industry Practice:** The State University of New York (SUNY) implemented a SOC that provides expertise, training, and resources around information security.
- **Prerequisites:** Each institution has a unique environment that requires specialized security. Implementation would first need to assess what types of security each institution needs and then design the SOC to be able to provide customizable support.

IT Security Staffing vs. Benchmark¹



¹Source: IT Staffing Ratios, Computer Economics, 2020.

Data Analytics and Reporting

The USHE System office should provide a consolidated center of expertise for analytics, which would increase the sophistication of data use and promote data standards.

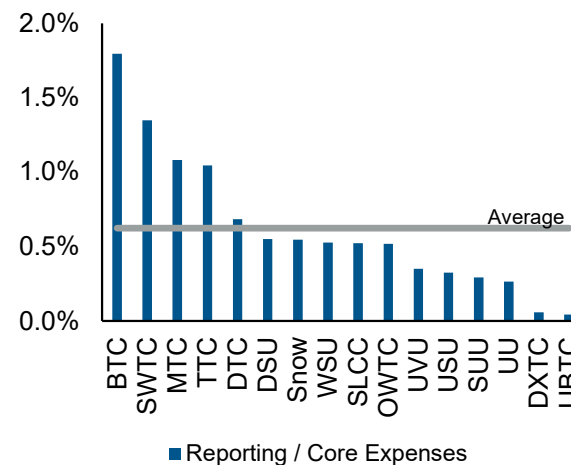
Case for Change

- **Rationale:** The percentage of institutional core expenses dedicated to reporting and analytics range from about 1.8% to less than 0.1%, yet the System must collect and aggregate data from all institutions to obtain high-level insights. Reports posted online by the System currently have limited granularity as a result.
- **Industry Practice:** Other large state systems are exploring the role of data analytics at the system level to help inform policymakers as well as institutional executives in their decision-making processes.
- **Prerequisites:** This effort would require buy-in from the IT, IR, and functional users across all USHE institutions, to create and maintain systemwide data definitions and change management processes to adapt over time.

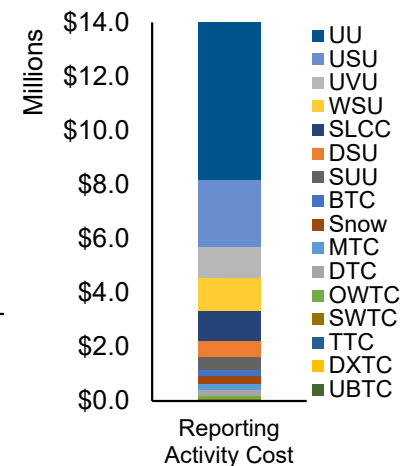
¹ Core Expense data from IPEDS, 2019

Reporting Activity Analysis

Reporting vs. Core Expense¹



Reporting Expense



Almost 1500 staff across the system spend time on reporting for a total of about 150 FTE, which indicates a high degree of fragmentation.

Onboarding & Experience Program

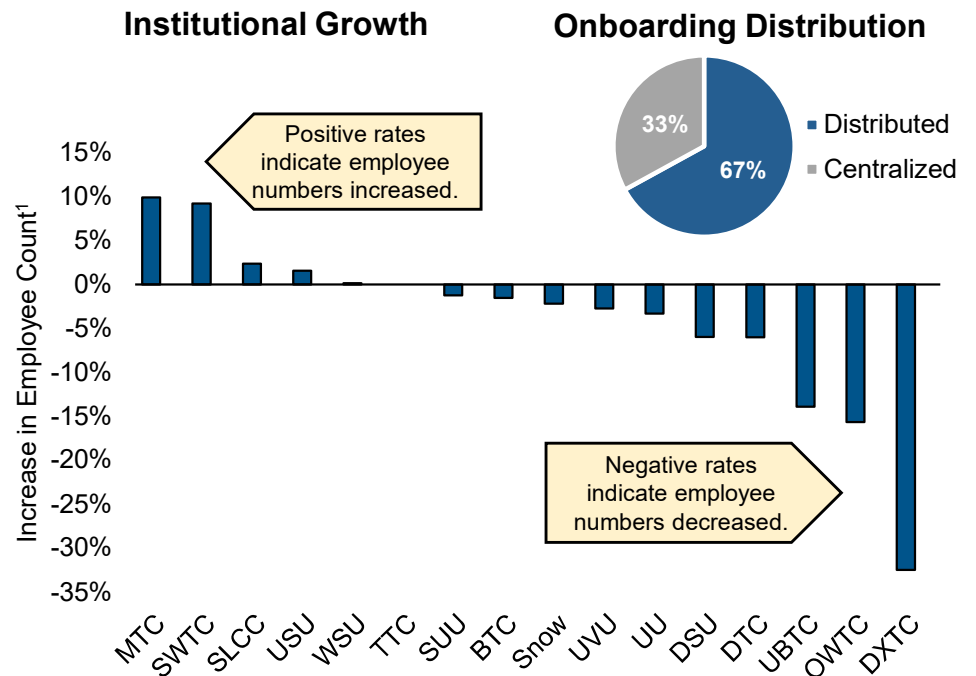
Establishing a central onboarding center of expertise at the local or group level will emphasize consistency and improve employee experience, at the point of hire as well as 30, 60, 90 days post-hire.

Case for Change

- **Rationale:** Role descriptions and onboarding programs are inconsistent across the System, which impacts employee turnover and overall wellbeing. Centralizing the onboarding program will clarify role distribution as well as increase employee understanding and satisfaction.
- **Industry Practice:** At the University of Missouri System, employees are provided with onboarding resources to track their progress during their first year through a user-friendly website.
- **Prerequisites:** Many roles do not have clear descriptions as individuals inherently “wear many hats”. Standardization and outlining of role specific responsibilities will need to be completed to create an effective onboarding program.

Source: ¹Growth rates calculated from IPEDS 2020, 2019 total employee count data

Onboarding Activity Overview



Employment Law

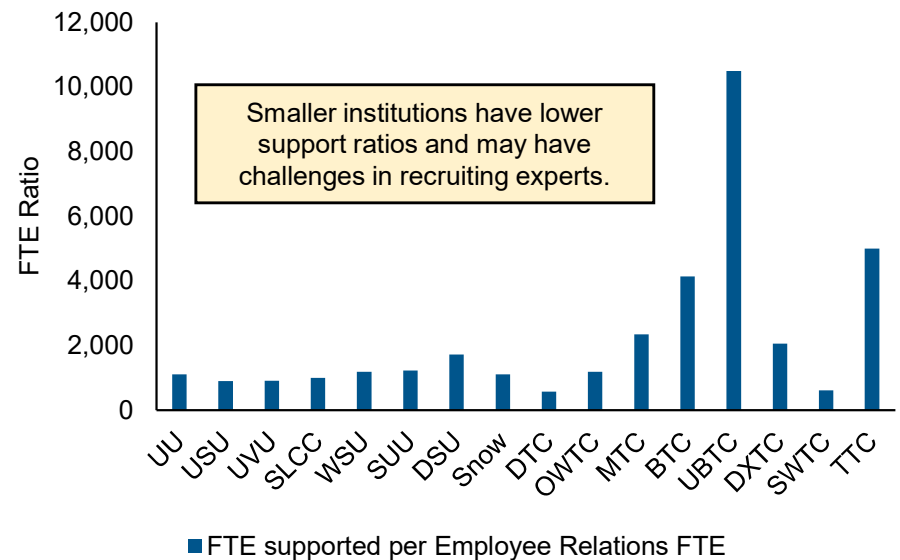
USHE can reduce resource disparities and ensure employment law compliance by creating a center of expertise to support employee and labor relations efforts.

Case for Change

- **Rationale:** Stakeholders discussed that employment law lacks systemwide resources and HAAS data shows that most institutions dedicate less than one FTE to employee and labor relations. Developing a center of expertise will increase compliance and capacity across the System through better supported employee and labor relations.
- **Industry Practice:** At the University of Chicago, a center of expertise was developed for Employee and Labor Relations to provide guidance around policy, contract administration, employment law compliance, performance management, and leaves of absence.
- **Prerequisites:** Each institution has their own unique set of policies. In order to develop a well-functioning CoE, experts would have to have extensive knowledge of all policies throughout the System or group.

Employee & Labor Relations Support

Institutional FTE per Employee & Labor Relations FTE



Procurement Operating Model

Procurement's value-proposition can be enhanced by focusing on increased collaboration, improved data visibility, optimized systemwide spend, and a reduction in redundant workload between institutions.

Case for Change

- **Rationale:** A centralized operating model would lead to consistent review of spend areas across institutions. This would increase procurement collaboration which could lead to potential cost savings, an improvement in data visibility and quality, and reduction of redundant work.
- **Industry Practice:** The University of Tennessee system implemented a center-led procurement operating model that has one CPO who is accountable to coordinate and achieve established goals and KPIs across the system. The system office also assists with standardization, best practices, and talent management.
- **Prerequisites:** Currently, institutions have varying procurement systems. Moving to a common procurement system would need to first occur before implementing a new operating model.

Operating Model Options



EVENT FOCUS

USHE System Office helps identify collaboration opportunities and planning for single sourcing events.

Institutions have the structure to collaborate on sourcing events as needed.



CATEGORY LEADERSHIP

USHE office provides category management services for institutions in high spend areas. Institutions manage all other categories.

Flexible approach with centrally managed strategy and autonomy for institutions to manage the non-center led spend categories and all transactional activities.



CONSOLIDATED

Centralized function aggregates all procurement activities into a single USHE managed department.

USHE service center is responsible for managing all purchasing and contracting activities.

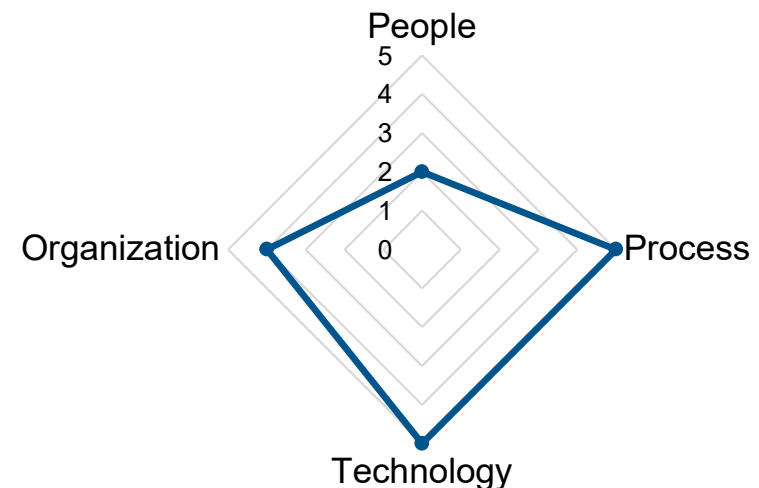
Performance Management

Developing a center of expertise that acts as a resource center for best practices will support institutions in their performance management processes and their learning and development programs.

Case for Change

- **Rationale:** Despite 700 employees contributing to performance management systemwide, OFI scores and workgroup feedback highlight a lack of consistency with performance management. A center of expertise will ensure that institutions have adequate resources to implement more strategic performance-related practices.
- **Industry Practice:** At a public research university, performance management was consolidated to increase process stability and to avoid duplicated efforts that produce inconsistent results.
- **Prerequisites:** Training and culture are specific to institutions, especially amongst the degree-granting vs. technical institutions. Resources should be easily customizable, rather than standardized, across the System to account for these differences.

Performance Management OFI Scores



The OFI data identified Workforce Planning and Analysis as one of the top areas for improvement.

Project Management Office (PMO)

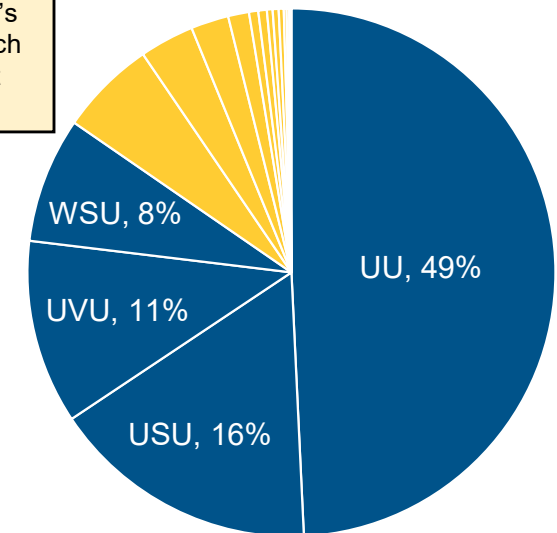
Implementing a shared PMO structure could support institutions in more effectively driving their own process improvement, which was an area cited as under resourced by the institutions.

Case for Change

- **Rationale:** PMOs support leaders in managing improvement initiatives where they otherwise would not have the capacity or expertise. USHE currently has a wide variance in this activity across the System which creates a large gap in the ability to drive continuous improvement.
- **Industry Practice:** Numerous institutions and systems establish project management units around functions (ex: IT PMOs) or spans of support (ex: systemwide initiatives), both of which provide transparency into available resources for significant initiatives.
- **Prerequisites:** Effective PMOs require clear mandates on their scope of services/oversight, which makes it critical to appropriately structure the unit around specific goals and ensure its staffing is tailored to those goals.

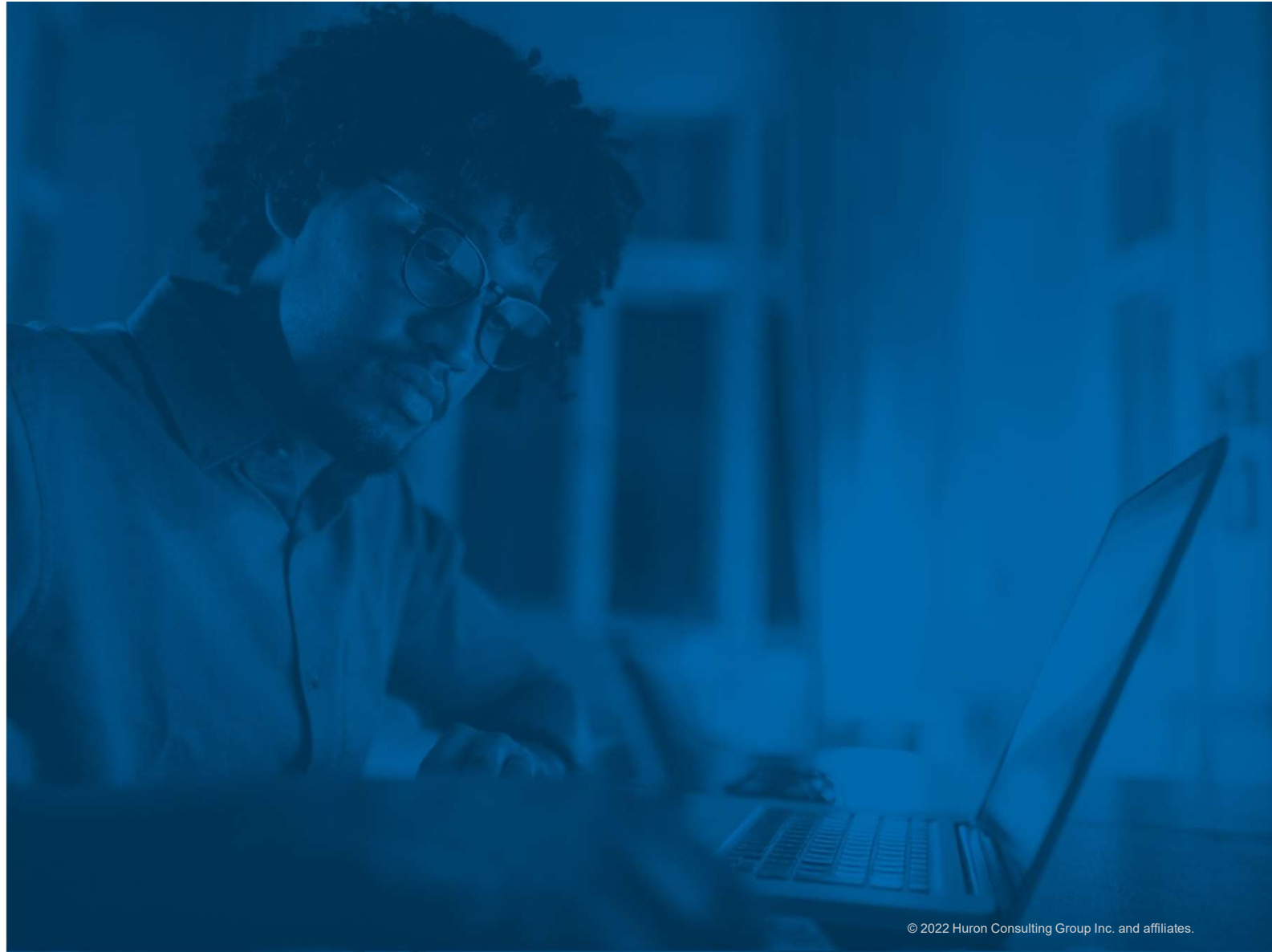
Project Management FTE Investment

Despite representing 25% of expenditures, 12 institutions account for only 16% of USHE's Project Management FTE, which suggests a scarcity of project management support.



2c

Tier 1



Help/Service Desk

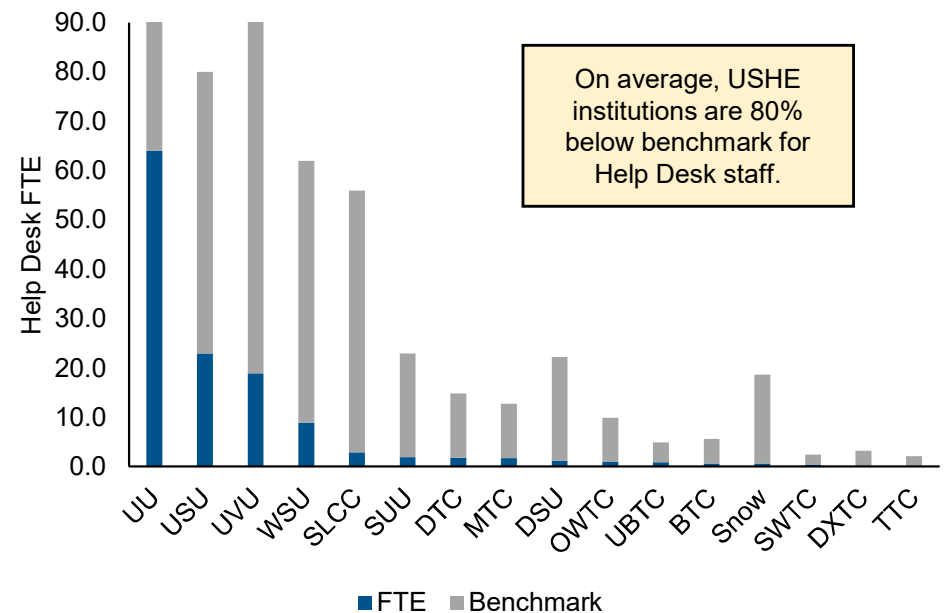
USHE utilizes a total of 129.7 FTE for IT service-related processes, which is far below industry benchmarks and highlights the potential for centralized local, group, or System IT Help Desks.

Case for Change

- **Rationale:** Automation of processes and varying platforms calls for more timely resolution for technology problems. A tier 1 service desk will increase FTE dedicated to IT-related questions, which leads to greater efficiencies through faster turnaround time.
- **Industry Practice:** At a public university system, an IT service desk was implemented as a single point of contact for all technical questions including ERP support and security. Any exceptional cases are escalated to appropriate campus or departmental resources.
- **Prerequisites:** Varying technology across the System stands as a barrier to a systemwide help desk. Help desk staff will need to have a clear understanding of how to best answer questions that relate to these differences.

Source: ¹IT Staffing Ratios, Computer Economics, 2020.

Help Desk Staff vs. Benchmark¹



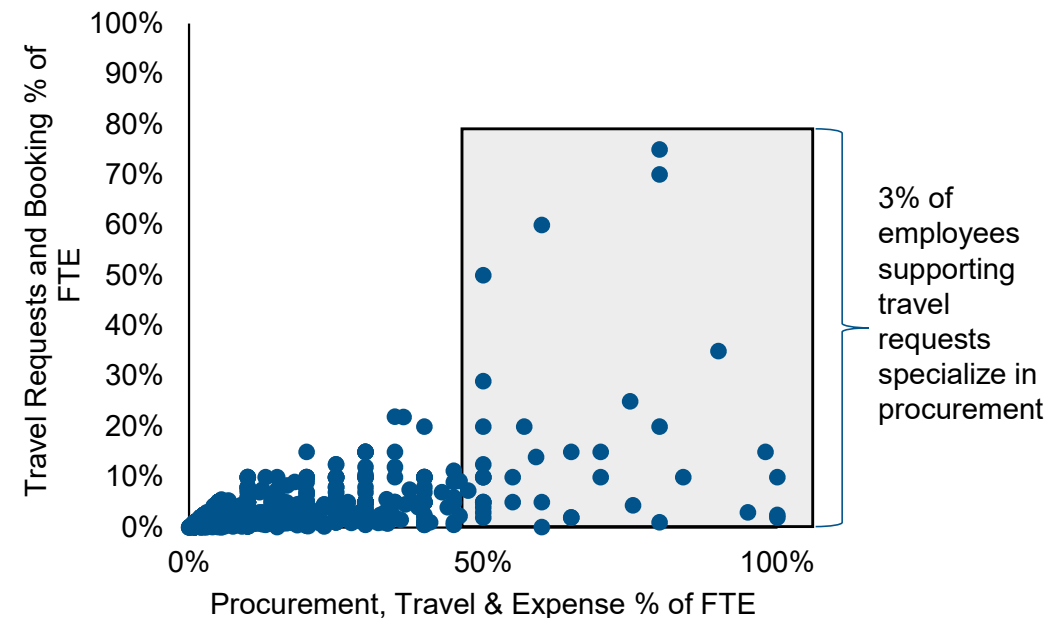
Travel Support Center

Establishing a central travel support center to perform travel authorizations, bookings, and other processing activities would create expertise and reduce costs in the area.

Case for Change

- **Rationale:** USHE institutions currently spend \$2.9M and 38.4 FTE across 1,500 employees on travel and requesting and booking. Due to the low level of technical skill required for the requisite activities, a center of expertise could offload some of the associated administrative burden while creating specialists in support.
- **Industry Practice:** Multiple university systems leverage travel & support experts, either through their own dedicated center or via outsourced travel agencies.
- **Prerequisites:** Prior to implementation, there would need to be detailed process mapping and standardization of policy in order to create efficiencies and the knowledge base to provide institutions with a high quality of service.

Specialization of Travel Support



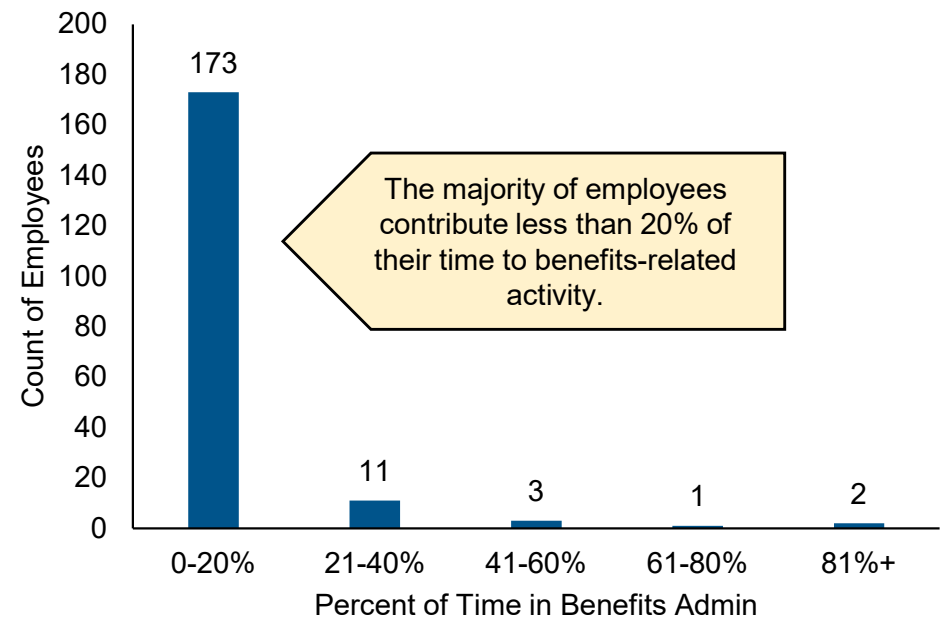
Benefits Administration

USHE can improve service delivery and employee satisfaction by establishing tier 1 support focused on answering and appropriately triaging benefits-related inquiries.

Case for Change

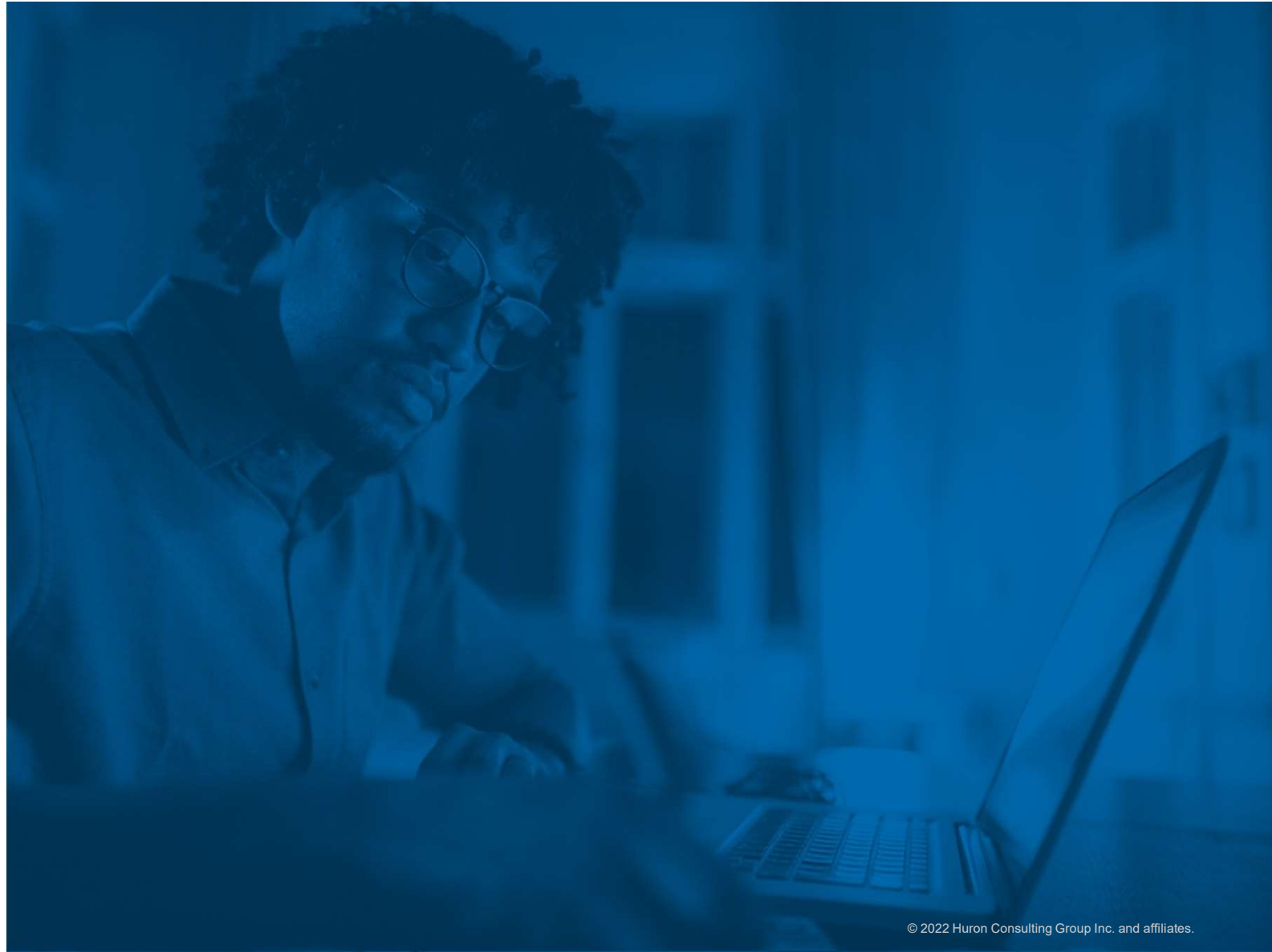
- **Rationale:** Across USHE, just 13.9 FTE is dedicated to benefits administration, which results in under-resourced and passive service delivery. A dedicated call center would provide a one-stop-shop for benefit and leave related questions to ensure consistency and increase customer satisfaction.
- **Industry Practice:** At the University of California System, a benefits-related website was created to view and manage benefits information. Services include viewing statements, updating tax withholdings, managing insurance allotments, and enrollment
- **Prerequisites:** Staff and faculty across institutions have varying benefits that are specific to their role. This should be addressed at the local level before administering a wider used shared service.

Employee Time Spent in Benefits Admin



2d

Talent & Culture



Leave Policy Standardization

Policy standardization, including policies such as parental leave, vacation accrual, and catastrophic leave, will move USHE closer to industry benchmarks and increase systemwide collaboration.

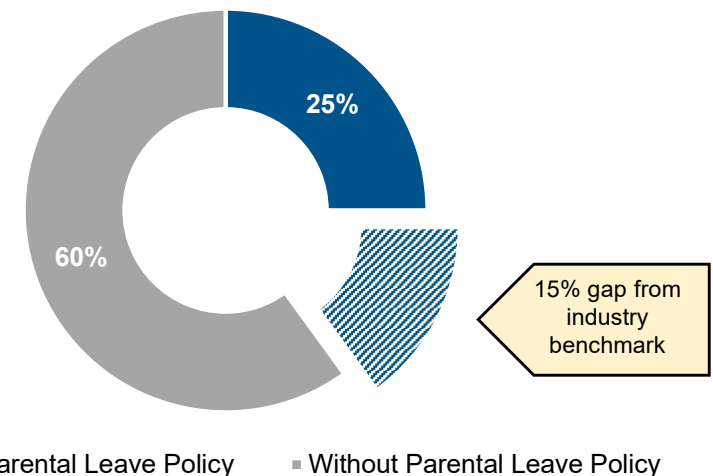
Case for Change

- **Rationale:** Conversations with stakeholders revealed that parental leave is unique within each institution and often varies across faculty and staff. This causes difficulties amongst employees when transferring from different institutions and evaluating the variety of benefit offerings. Standardizing would ensure fair competition across the System and avoid employee confusion.
- **Industry Practice:** At the University of Illinois system, faculty and staff are eligible for up to six weeks of paid parental leave which is counted toward the 12-week family and medical leave entitlement.
- **Prerequisites:** Many institutions have unique leave benefits across faculty and staff. In order to establish consistency across the System, policies will need to be standardized first at the local institutional level.

Sources: ¹Parental Leave Policies taken from institution websites

²CUPA-HR 2021 Benefits in Higher Education Annual Report

Percentage of Parental Leave Policy¹



Around 40% of higher education institutions offer paid parental leave in addition to vacation and sick time.²

Centralized Recruitment Operations

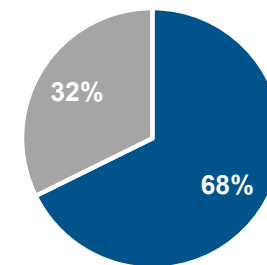
USHE can ensure consistent and strategic recruitment processes for both the end-user and internal stakeholders through increased centralization and ownership of recruiting operations.

Case for Change

- **Rationale:** Current USHE Recruitment Operations are decentralized, with only around 30% of operations occurring within the central unit. Distributed recruitment operations results in a deficiency of shared resources across the units and a lack of collaboration. Waning talent pools across the industry impose a need for centralization to ensure a more strategic focus on current processes.
- **Industry Practice:** The University of Wisconsin maintains standardized, centralized recruitment processes to ensure compliance and efficiency.
- **Prerequisites:** The institutions across USHE have unstandardized and distributed recruitment practices. Standardization at the local level would have to be addressed before group level centralization can occur.

Recruitment Distribution

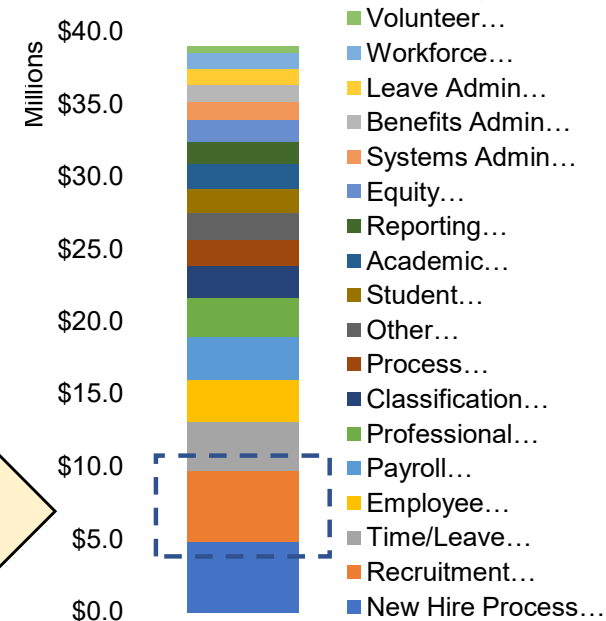
Recruitment Activity Distribution



■ Distributed ■ Central

USHE spends \$4.9M on recruitment-related activity

HR Investment by Activity



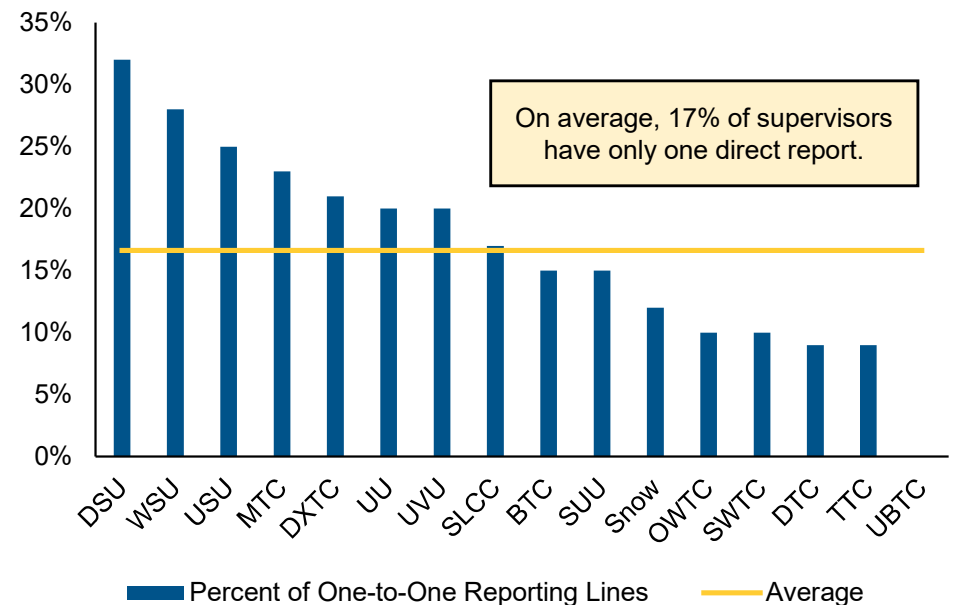
Increase Managerial Spans of Control

USHE has a high prevalence of supervisors spending the majority of their time doing line work rather than managerial activities. Narrowly focused redesign and role consolidation can improve efficiency.

Case for Change

- **Rationale:** Broadening spans of control can promote more effective supervision, streamlined processes, and better utilization of resources, which helps to stabilize performance management and minimize title inflation.
- **Industry Practice:** It is generally recommended to reserve one-to-one reporting relationships for exception scenarios, but one possible target is to not exceed 5%.
- **Prerequisites:** In order to accurately monitor the number of one-to-one reporting lines, consistent processes and procedures for maintaining supervisor information would need to be implemented. Roles must be standardized to include well-defined scopes of work and career paths for non-managerial senior staff should be identified.

Supervising Activity FTE vs. 1:1 Reports¹



Source: ¹One-to-one reporting lines were obtained from the census files provided by each institution.

Talent Acquisition Collaborative

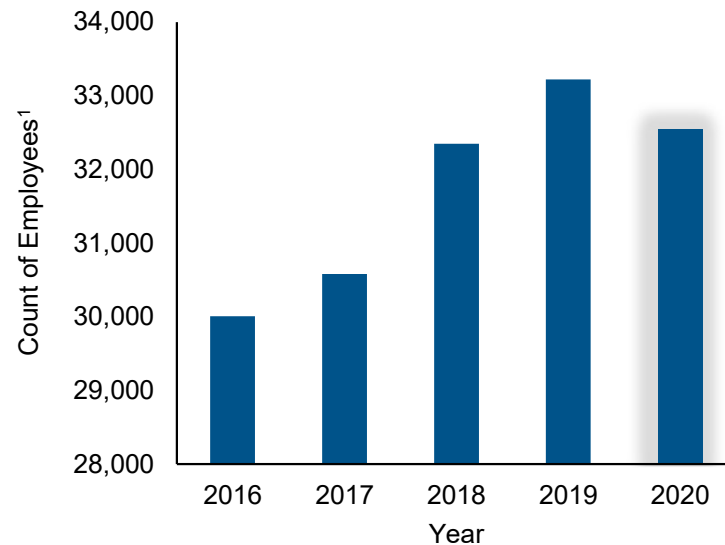
USHE can improve talent management with group or systemwide integrated business processes that facilitate retention and provide data for employee acquisition needs.

Case for Change

- **Rationale:** Market trends have seen a waning workforce which has prompted a need for more collaborative talent and acquisition processing. Implementing a centralized model to support employee transfers across institutions and the maintenance of the existing talent pool will provide a net benefit to the System.
- **Industry Practice:** The University of Oregon established a single central website for job openings throughout neighboring institutions to be used as a resource for individuals looking for employment in a certain area.
- **Prerequisites:** Talent and acquisition is distributed within institutions. Centralization of recruitment operations will need to occur at the local level before a systemwide resource can be implemented.

Source: ¹IPEDS Total Employee Count

USHE Employee Trends

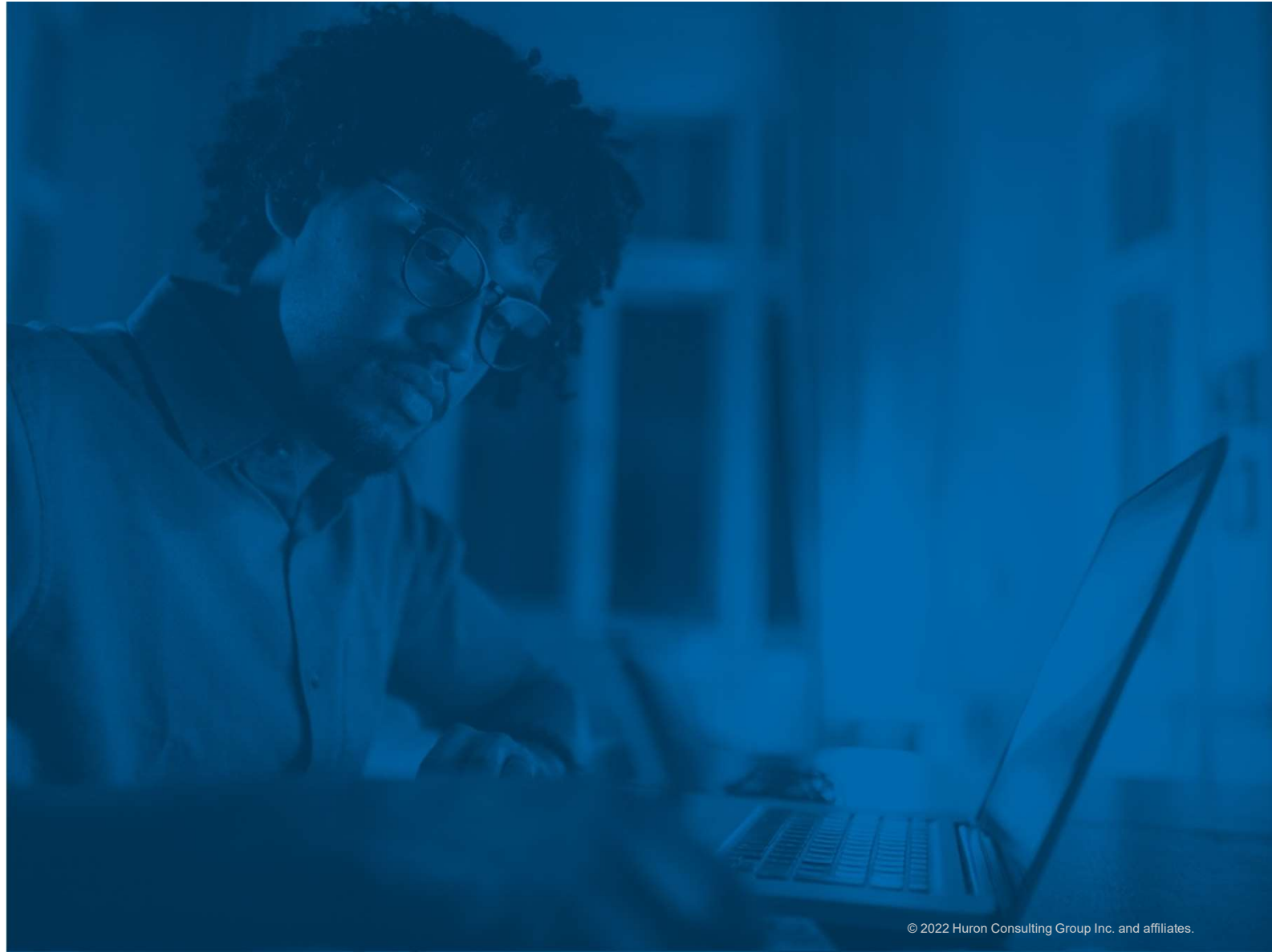


“Great employees are leaving the higher education industry because we don’t have the resources to connect them with other institutions.”

USHE saw employee growth until 2020, which shows the need to focus on retention strategies to avoid unwanted employee turnover.

2e

Foundational Opportunities



Foundational Opportunity Overview

Foundational opportunities represent policy, process, or technological initiatives that are necessary and enabling steps for developing more comprehensive systemwide opportunities.

Foundational Opportunity Areas



Policies: When do policies need to be unique and when should they be standardized?



Processes: Are current business processes capable of supporting systemwide initiatives?



Technologies: What technologies and systems are scalable across the System?

Example Results



Finance: Accounts payable operations, treasury operations, general accounting services, and journal entry processing



Human Resources: Payroll services, benefits administration, strategic talent acquisition, management, and new hire processing



Procurement: Purchasing and payment services, P-Card management, and increased, streamlined, and standardized purchasing processes



Information Technology: Systemwide data analytics and reporting, consistent quality of information security offerings, and support for System provided services

System Policy Framework

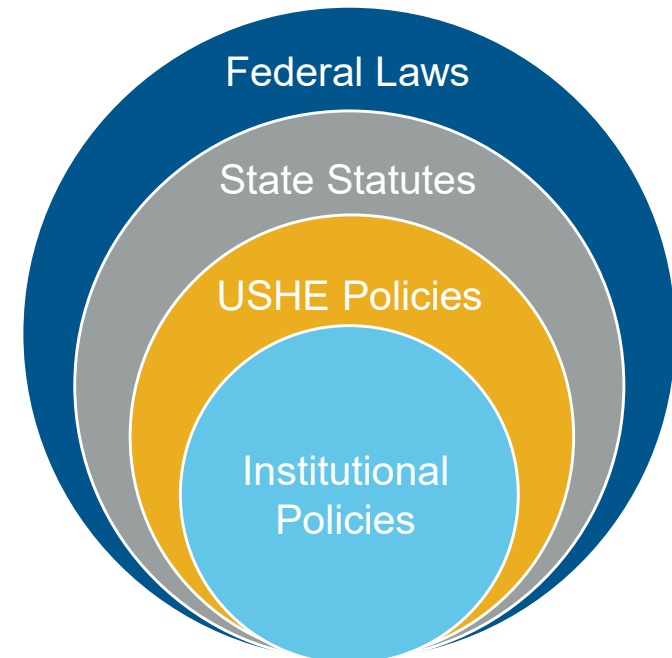
USHE can streamline policies and procedures via a hierarchal framework in order to eliminate redundancy, close gaps, and rectify conflicting policies that cover subsets of the System.

Case for Change

- **Rationale:** Discrete sets of policies for subsets of the System creates complexity which can lead to confusion, gaps, and contradictory expectations for compliance. For example, institutional governance policies are still split between USHE and formerly UTech institutions¹.
- **Industry Practice:** The University of Wisconsin System adopted a single policy framework that aligned the institutions within the System, which simplified the policy library and clarified the requirements for compliance.
- **Prerequisites:** Leadership would need to have a mandate to formalize and enforce a single set of policies and procedures for all institutions within the System. Institutions requiring policy adjustments will need to make action plans for addressing these changes.

Source: ¹USHE Policy Website (<https://ushe.edu/policies/>)

Unified Policy Framework



Standardize Procurement Platforms

Moving procurement services to a common platform at the group or System level will increase the ability to leverage contracts, analyze institutional spend, and provide a more consistent buying experience.

Case for Change

- **Rationale:** Currently, USHE does not take advantage of shared procurement services. As a result, processes become redundant and expensive. Optimizing technology and services with tools that can be used systemwide will yield more efficient processes and potential cost-savings.
- **Industry Practice:** Multiple institutions and state systems operate with standardized procurement platforms. Such platforms are able to handle core procurement functions such as accounts payable, accounts receivable, and travel & expense.
- **Prerequisites:** Transitioning to a different procurement platform will be a large lift that alters current processes and policies. Ensuring that services align with all institutional missions will assist with getting stakeholder buy-in.

Procurement Technology¹ Overview

Institution	Finance	Procurement
UU	PeopleSoft	JAGGAER
DTC	Microsoft Dynamics Great Plains	Microsoft Dynamics Great Plains
MTC	Microsoft Dynamics Great Plains	Microsoft Dynamics, AvidXchange
Snow	Banner	JAGGAER
DSU	Banner	Banner
SUU	Banner	Banner
UVU	Banner	JAGGAER
TTC	QuickBooks	QuickBooks
WSU	Banner	JAGGAER
USU	Banner	JAGGAER
SWTC	QuickBooks	QuickBooks
BTC	Jenzabar	Jenzabar
UBTC	Alio	Alio
DXTC	Microsoft Dynamics Great Plains	Microsoft Dynamics Great Plains
OWTC	Sage MAS 500	BP Logix
SLCC	Banner	JAGGAER

Source: ¹Procurement technology from Huron data request 3.01 and 6.05

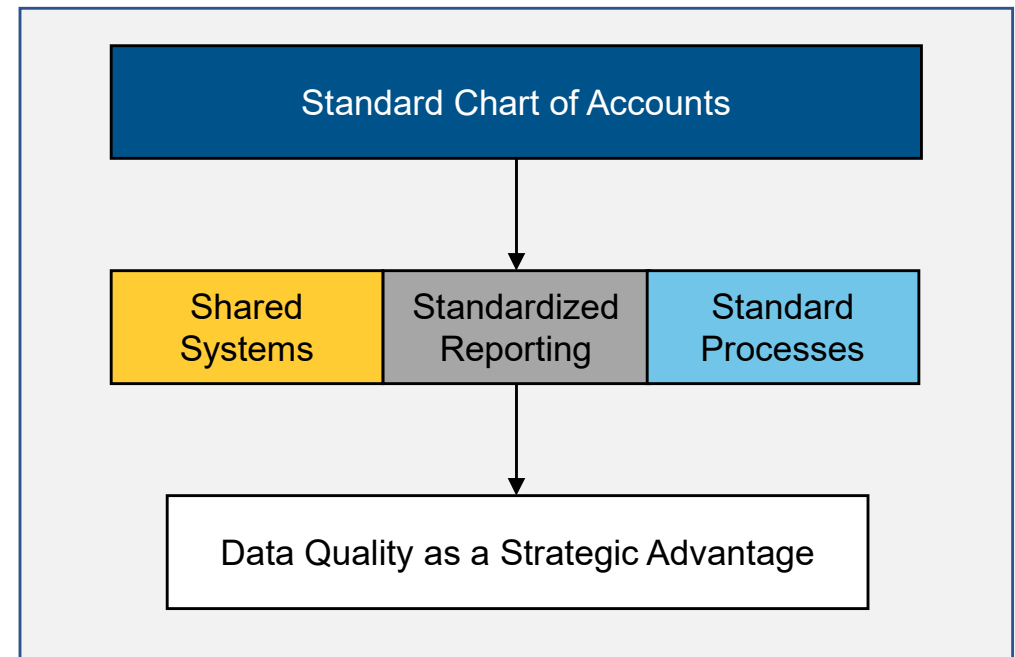
Chart of Accounts Standardization

USHE lacks a standardized chart of accounts, which creates disorganized and inconsistent systemwide data as well as a barrier for cross-institution collaboration.

Case for Change

- **Rationale:** Standardization of institutional chart of accounts will make for easier systemwide collaboration and data collection as well as increase efficiencies within institutions that might not have a structured/strategic chart.
- **Industry Practice:** A public university system uses a standardized chart of accounts structure at all institutions, which allows for uniform reporting for the entire system. The chart is comprised of 7 transferrable account number segments.
- **Prerequisites:** Varying technology and platforms that have in-house customizations along with unique institutional financial needs call for a chart of accounts that is robust enough to adequately capture all necessary information.

Impact on Data Quality



Compensation & Classification

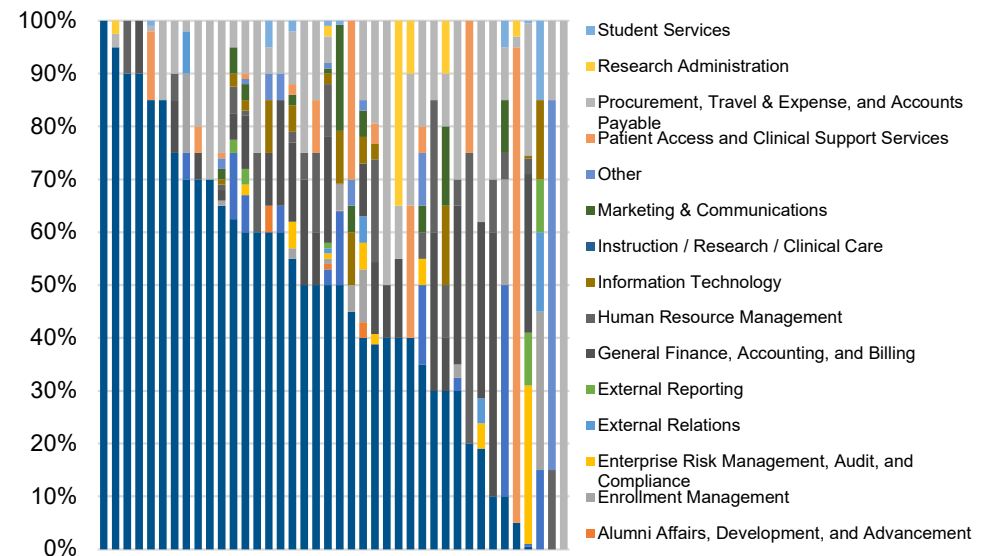
A compensation & classification study would help create consistency, equity, and improve talent development at USHE institutions.

Case for Change

- **Rationale:** Compensation & classification was identified as the number one area for improvement in the OFI survey. For example, administrative assistants at UU “wear many hats” and have inconsistent job duties, which can create discrepancies in compensation and equity practices. This finding is mirrored systemwide.
- **Industry Practice:** The University of Wisconsin System is engaged in a redesign of job titles and compensation structures to create relevant and market informed positions that support retention, growth, and equity.
- **Prerequisites:** A successful study requires establishing a project team, balancing institutional needs with best-practices, and employee engagement across the System.

Role Comparison by Function

Sample of UU Administrative Assistant Job Code¹



Note: ¹Data represents 40 of 116 administrative assistant positions

Systemwide ERP

Implementing a systemwide ERP would provide “one version of the truth” across all USHE institutions, allow for business process standardization, and reduce institution-specific technical debt.

Case for Change

- **Rationale:** Stakeholders identified the absence of standardized processes and systems as a barrier to major opportunities. A standardized ERP would overcome this barrier supporting systemwide cost saving and service improvement initiatives.
- **Industry Practice:** Systems such as Wisconsin, Texas, Penn State and California have implemented shared information services across their institutions, in order to realize efficiencies based on shared resources, hardware, data centers, and governance.
- **Prerequisites:** A common ERP requires coordination between all functional areas across the System to standardize data and have similar, but not identical, processes.

Institutions & Users¹ per ERP Solution

■ Jenzabar ■ PeopleSoft ■ Dynamics ■ No ERP ■ Banner

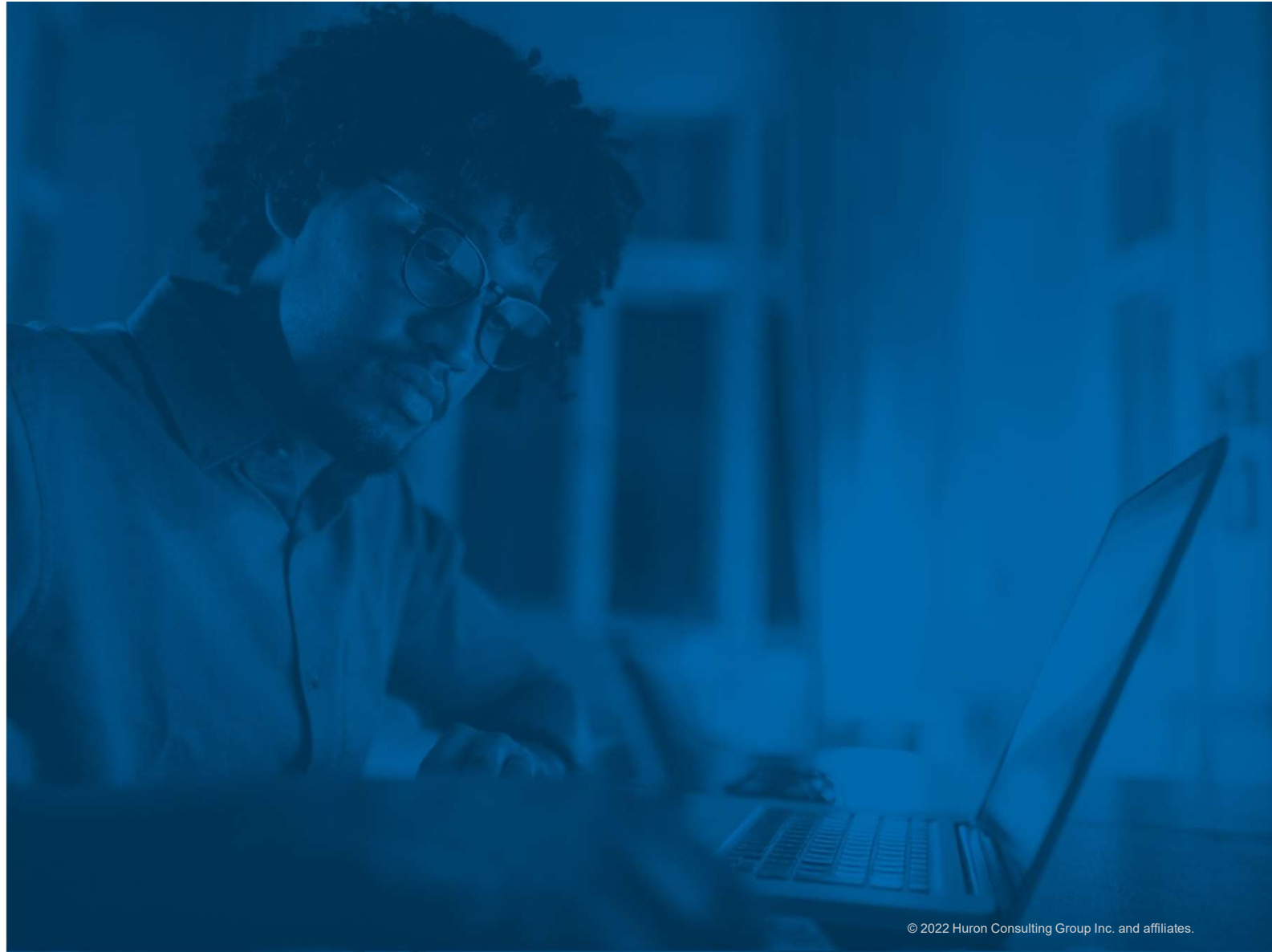


By implementing a systemwide ERP, the benchmark of 30 users per ERP support person at small, and 60 at medium-sized, institutions increases to about 110.

Note: ¹Users include students, faculty, and staff.

2f

Local
Opportunities



LOCAL OPPORTUNITIES

While the menu of opportunities includes opportunities applicable at the local level, this set of opportunities narrowed the focus to each USHE institution.

Huron heavily leveraged institutional feedback to ensure that the identified opportunities are reflective of key pain points and/or potential for improvement.

01

Stakeholder Interviews

Initial insights and target areas were derived from institutional interviews.

02

OFI Survey results

Insights were supplemented by the identification of high-potential areas for improvement.

03

Targeted Analysis

Opportunities were then refined using targeted HAAS and supplementary data analysis.

HR
Local

Embedded HR Model (University of Utah)

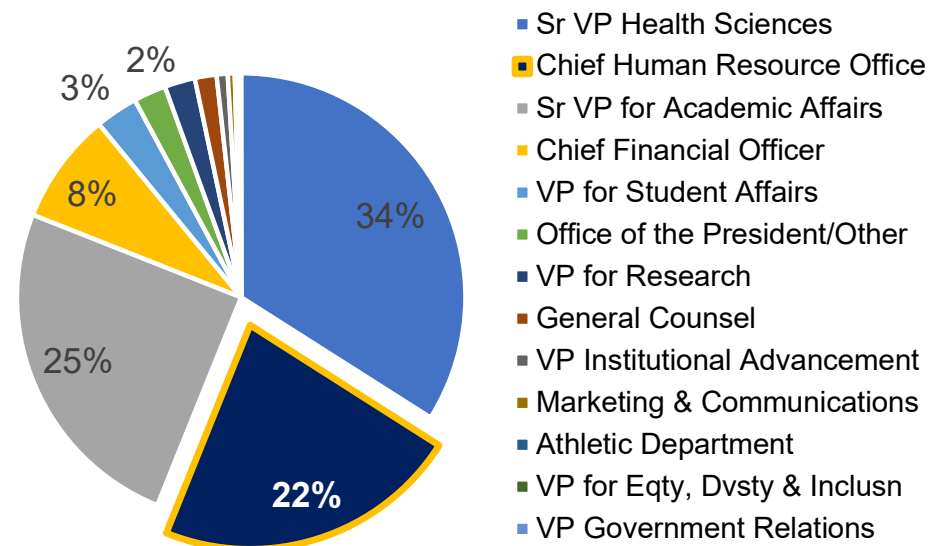
The University of Utah currently spends \$20.3M across 191.1 FTE on delivering Human Resources, with just 22% of that effort in the central unit. Centralizing services can reduce costs and decrease risk.

Case for Change

- Rationale:** The current operating model for delivering HR services at UU allows units to both leverage centralized support for a fee in the “embedded” model and to also create their own HR operations.
 - This distribution creates a duplication of effort, reduces specialization, and creates risk through limited central oversight. Expanding the centralized support counteracts these issues.
- Industry Practice:** Penn State realigned distributed, departmental HR resources into a shared service center to create more efficient and data-driven service, based on industry best practices.
- Prerequisites:** The institution would need to identify the specific HR functions for the central unit to perform and conduct detailed process mapping.

Distribution of Human Resource Support

FTE Contribution by Division



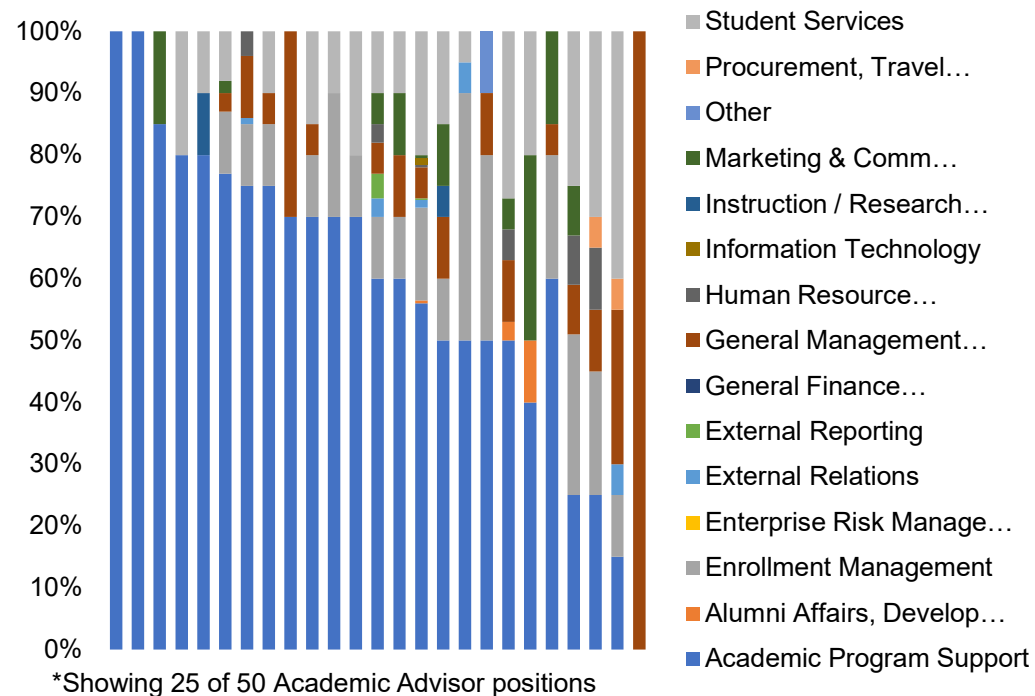
Academic Advising (University of Utah)

Academic Advising across UU is exceedingly fragmented; individuals who have the same job code have very different job activities. UU should work to standardize roles to increase consistency and equity.

Case for Change

- **Rationale:** Academic program support is highly distributed across units at UU and Academic Advisors have inconsistent and fragmented roles. Centralization will assist with standardization, create clear role expectations, and ultimately increase efficiency.
- **Industry Practice:** The University of Chicago has a central Academic Advising Office that maintains standardized roles and processes for employees to concomitantly ensure consistency and efficiency.
- **Prerequisites:** Currently, academic advisors are performing multiple activities throughout the institution. Redesign of their roles may create service gaps in other areas of work that would need to be identified and addressed during implementation.

Sample Academic Advisor Fragmentation*



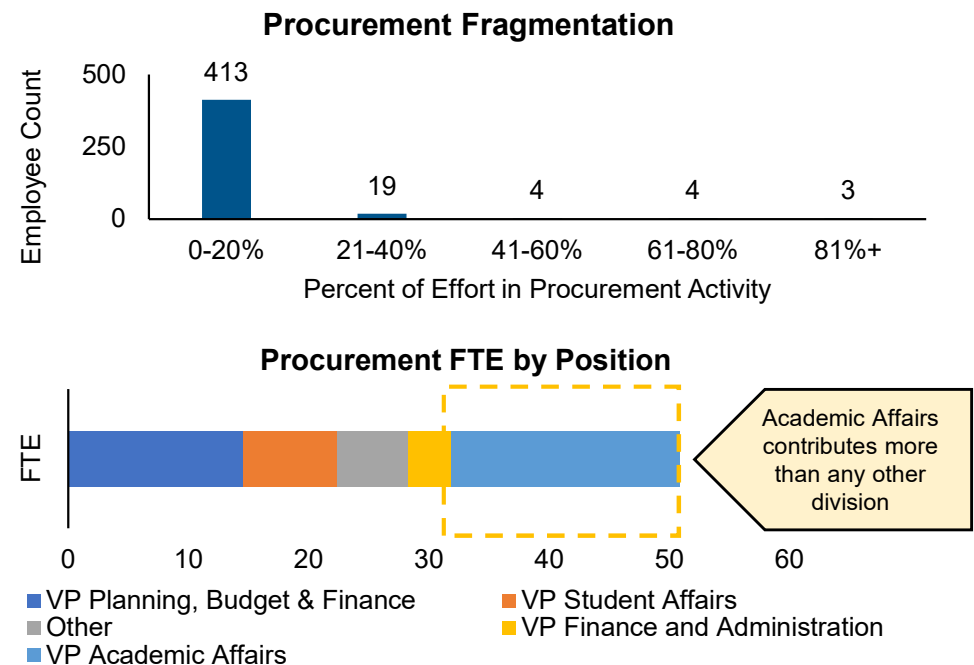
Increase Centralized Procurement (Utah Valley University)

Utah Valley University procurement activities are performed by generalists with the majority of activity occurring outside the centralized unit. UVU can improve employee efficiency by centralizing activity.

Case for Change

- Rationale:** The procurement function is supported by fragmented effort, with 93.2% of effort coming from employees spending less than 20% of their time in the area. UVU can reduce the annual \$3.4M expenditure on procurement by increasing the centralization of procurement activities, such as requisitioning or purchasing.
- Industry Example:** USNH Procurement, a system operated unit, manages various steps of the procurement process for the entire system, which includes much of the shopping, requisitioning, and purchasing activities.
- Prerequisites:** Process mapping, policy standardization where applicable, identification of JAGGAER adoption, and a change management plan to increase JAGGAER adoption to balance risk with efficiency will need to occur.

Procurement Contribution



Centralize Select Finance Activities (Weber State University)

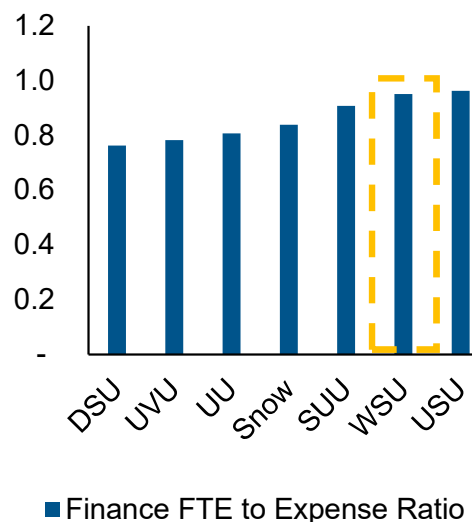
Weber State has the second highest ratio of finance support FTE compared to expenditures, which suggests the opportunity for efficiencies in finance service delivery through centralization.

Case for Change

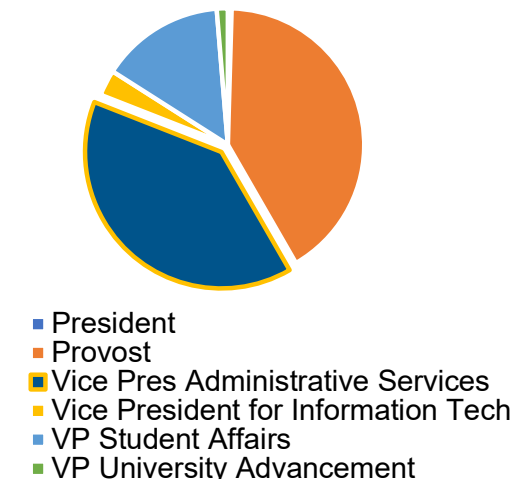
- Rationale:** WSU spends \$4.1M on 55.5 FTE to support finance functions across campus, with over 60% of this effort coming from units outside of Administrative Services. Centralizing specific financial services can help WSU align with peers while increasing service ability.
- Industry Practice:** The University of Michigan implemented a comprehensive financial shared services center that manages transaction and processing areas related to finance such as accounting, billing and collections, reimbursements, and travel & expense.
- Prerequisites:** Process mapping and standardization, identification of activities to be performed centrally, and change management are necessary preliminary activities. Additional resources may need to be allocated for any employee or position transitions across the organization.

Benchmarking and Finance Contribution

Finance FTE to Institutional Expense (Millions)



WSU Finance FTE



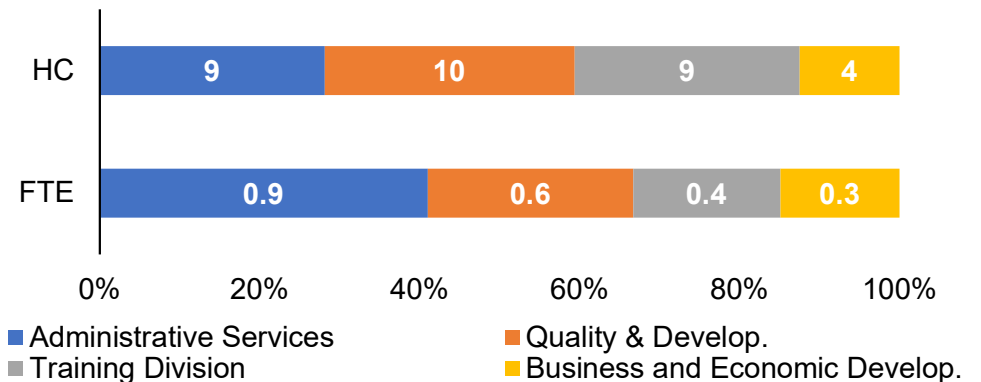
Project Management Office (Davis Technical College)

Project management is distributed throughout DTC. Establishing a centralized office supports strategic initiatives like the Salesforce implementation or other potential Technical College partnerships.

Case for Change

- **Rationale:** DTC currently allocates nearly \$250K across 32 individuals to support project management. Given DTC's strategic projects, such as the Salesforce implementation, as well as its position within the technical colleges, establishing a local PMO could contribute success locally and bring expertise in project management to other technical colleges.
- **Industry Practice:** The University of Illinois System manages a PMO that services the entire system in areas such as managing shared resources across the system, training and establishing project management best practices, and monitoring compliance.
- **Prerequisites:** DTC must first establish service level agreements with clear roles and responsibilities across the unit and set a reporting pathway.

Project Management Support by Division



Project Management Tasks

- Develop project plans
- Track project progress
- Provide updates to leadership
- Develop organizational strategy and implementation plans
- Design and facilitate system, process, or policy improvement initiatives
- Develop and manage change management

Finance Training (Bridgerland Technical College)

Department heads and director level positions perform over a fifth of all finance duties at BTC. Trainings to increase financial literacy can mitigate risks and increase the quality of financial services.

Case for Change

- **Rationale:** BTC spends approximately 5.7 FTE on finance related activities, over 20% of which is from 17 department heads and directors who often lack formal finance specialization. Providing trainings to these staff can increase the quality of service and mitigate risk.
- **Industry Practice:** Many higher education institutions either use workshops offered by independent and external organizations, or internal trainings led by their finance divisions.
- **Prerequisites:** Creation of training resources and internal agreement on best-practices will require identifying an individual or team to review existing training materials, if available, develop new ones, and hold scheduled training sessions.

Finance Contribution

Position Name	FTE	HC
Accountant - Administration	1.00	1.00
Administrative Assistant	0.20	1.00
AR Technician	1.00	1.00
Assistant Registrar	0.25	1.00
AVPs	0.08	2.00
Chief Information Officer	0.02	1.00
Controller	0.50	1.00
Department Heads	0.93	15.00
Directors	0.25	2.00
HR Manager	0.01	1.00
Senior Accountant	0.50	1.00
Specialist – Accounting	0.98	1.00
Grand Total	5.72	28.00

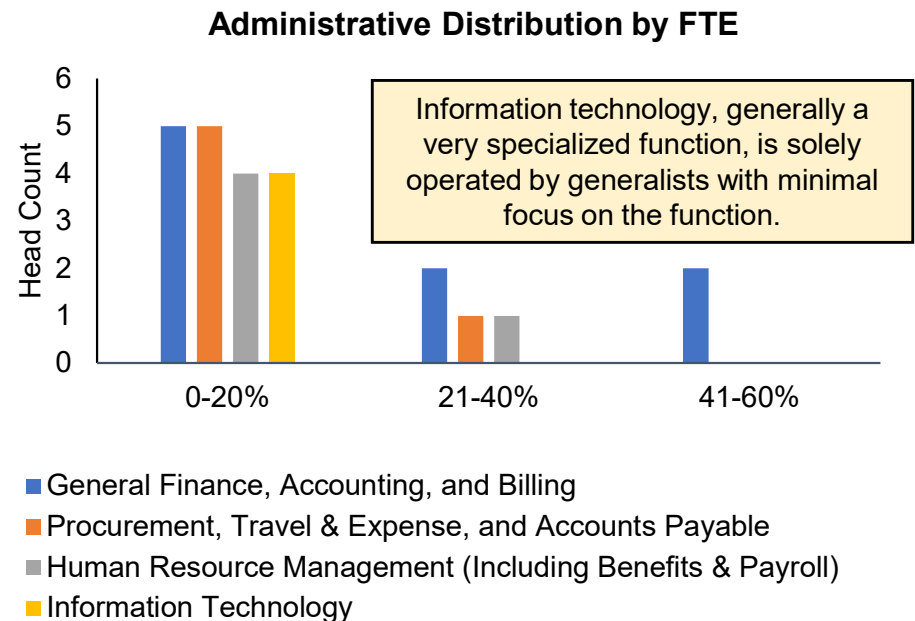
Standardize & Specialize Roles (Dixie Technical College)

DXTC can increase the specialization of administrative positions through role standardization, particularly the primary in-scope areas of HR, finance, procurement, and IT for improved service quality.

Case for Change

- **Rationale:** DXTC lacks proficient specialization, as just six of 24 individuals spent more than 20% of effort in a singular activity. Specialization can drive employee efficiency and address some of the bandwidth issues identified during interviews.
- **Industry Practice:** Institutions commonly redefine the roles, responsibilities, compensation, and classifications of employees as they find actual job functions drift from the original job description. Huron has partnered with several institutions to provide this service.
- **Prerequisites:** An understanding of current-state roles and responsibilities, title reviews, and decision-making around which positions should perform specific business processes in the future will need to be established.

Administrative Fragmentation



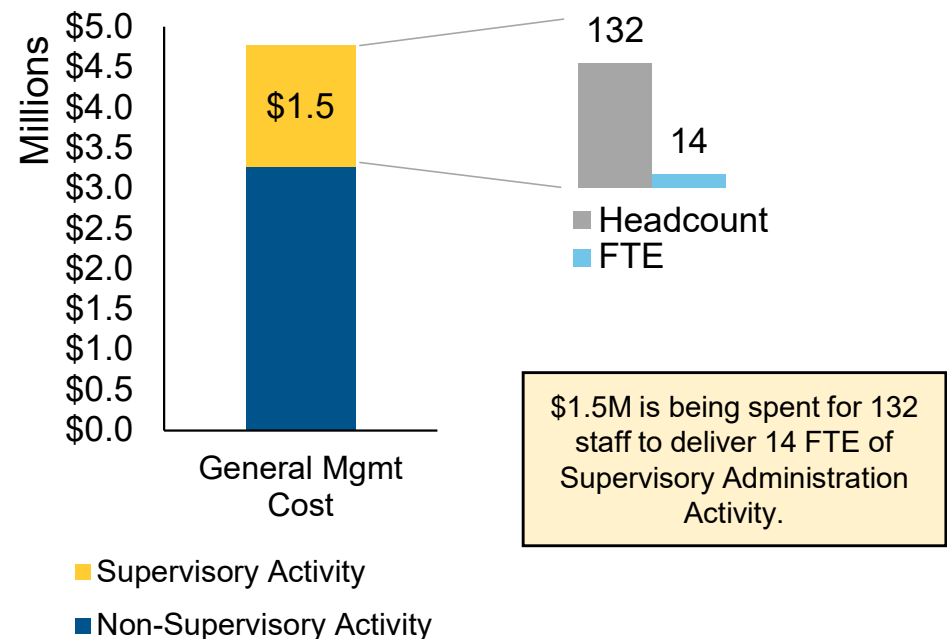
Reporting Relationships (Dixie State University)

DSU has a high volume of one-to one reporting lines, which represents the potential for a more effective reporting structure. A more consolidated structure will allow for reduced cost and increased efficiency.

Case for Change

- **Rationale:** 32% of reporting lines are one-to-one while supervisors spend an average of 11% of their time on supervisory activities. This prevalence of one-to-one reporting lines increases supervisory costs and limits staff career progression possibilities.
- **Industry Practice:** One-to-one reporting relationships are rarely an optimal use of resources and, in Huron’s experience, should not exceed 5-10% for any given institution.
- **Prerequisites:** In order to accurately monitor the number of one-to-one reporting lines, consistent processes and procedures for maintaining supervisor information would need to be implemented. Roles must be standardized to include well-defined scopes of work and career paths for non-managerial senior staff should be identified.

Count of Supervisors vs. Supervisory FTE



IT Centralization (Salt Lake Community College)

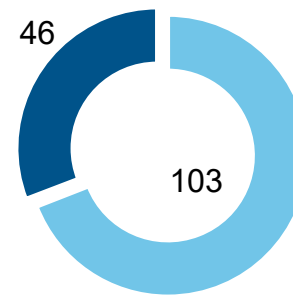
SLCC can further leverage IT expertise across the whole institution through a centralization effort to break down current silos that may offer varying standards, service levels, and effectiveness.

Case for Change

- **Rationale:** Roughly a quarter of spending on IT activities is spread out across over 100 staff who are in distributed departments. This suggests that there are opportunities to centralize these activities, which could lead to increased standardization.
- **Industry Practice:** Several colleges have implemented IT shared services by moving all decentralized units to a central IT unit to leverage existing expertise, promote technology standardization, and increase efficiencies.
- **Prerequisites:** Areas that have developed shadow IT staffing to meet niche needs are often reluctant to give those up without a clear plan for how their needs will be transitioned to central IT.

Distribution of IT Service Effort

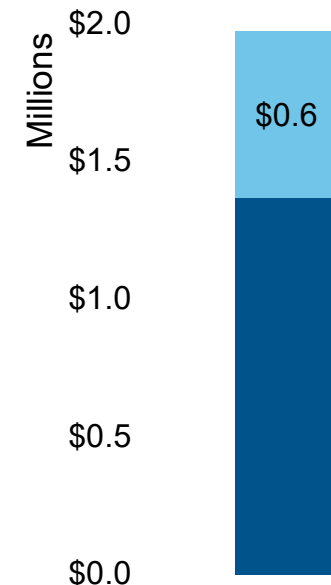
IT Headcount



■ Distributed ■ Central

103 distributed staff account for \$0.6M in IT activity spending that is outside of central IT.

IT Expense



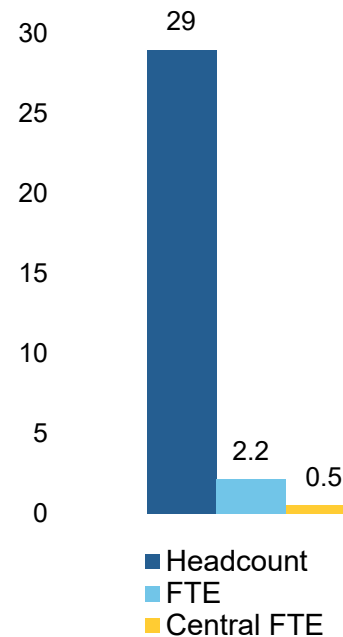
Database Administration (Southern Utah University)

Creating specialized database administrators can leverage expertise to automate routine tasks, allocate effort to more advanced database administrative activities, and reduce overall expense.

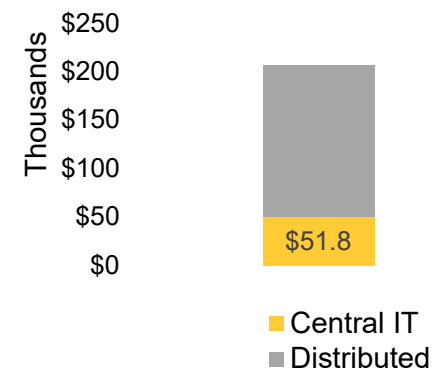
Case for Change

- **Rationale:** Database administration is currently fragmented across more than 25 employees. By consolidating this effort in a narrower set of specialized staff, SUU can focus its efforts on process improvement and automation.
- **Industry Practice:** Many universities have at least one highly specialized database administrator who either performs all patching and maintenance of databases or leads those efforts.
- **Prerequisites:** Identify the specific database administration tasks that are being performed by staff who are not database administrators and analyze the root cause for the fragmentation. Verify that non-DBA staff should have that level of access to databases.

Database Administration FTE vs. HC



Database administration activity has \$206K in expense, but only 25% of that is from central IT.



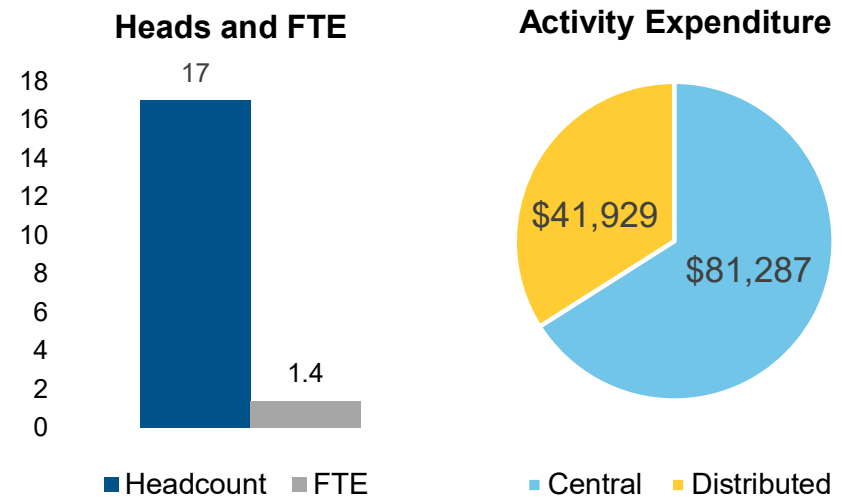
Project Management Office (Southwest Technical College)

SWTC currently has minimal specialization in project management, which hampers process improvement efforts. Key hires with PM specialization can greatly increase institutional effectiveness.

Case for Change

- **Rationale:** Interviews indicated that staff are busy keeping operations running which makes long-term projects challenging to execute. A full-time project manager will eliminate these obstacles and free valuable staff capacity for other, mission-critical activities.
- **Industry Practice:** Numerous institutions of all sizes have designated project management activities to an appropriate number of specialists who shepherd key initiatives and increase the success rate for these projects by utilizing standard methodologies.
- **Prerequisites:** Funding for the additional full-time project manager will need to be allocated. Further, adopting industry-standard project management practices often requires a cultural shift to be successful.

Project Management Activity Metrics



Project Management is fragmented, with \$123K in labor expense for 1.4 FTE spread across 17 staff.

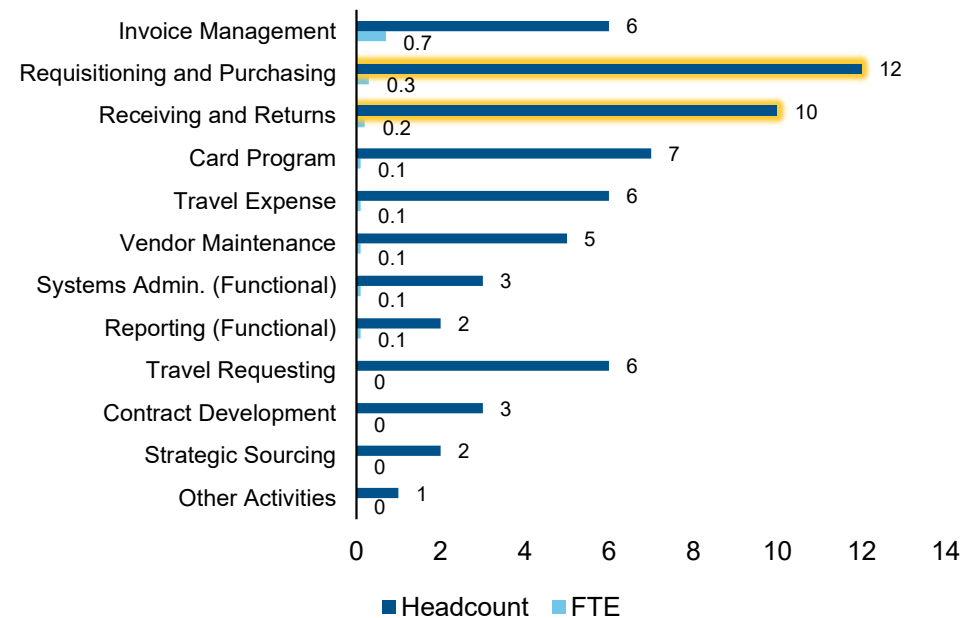
Procurement Centralization (Uintah Basic Technical College)

Centralized activities will result in standardized understanding and implementation of procurement regulations, which will focus the expertise for these tasks across the institution.

Case for Change

- **Rationale:** Compared to other procurement activities, those that involve purchasing, receiving, and returning are touched by a high volume of staff. Together, at least 12 staff perform less than 0.5 FTE of activity, which highlights potential risk as well as opportunity for improved service delivery.
- **Industry Practice:** It is standard practice within the industry to centralize procurement processing to ensure compliance with purchasing regulations and increase processing speed.
- **Prerequisites:** Standardizing and automating tasks within a common platform will be critical to successfully centralizing these activities.

HC vs. FTE for Procurement Activities



IT Service Delivery (Utah State University)

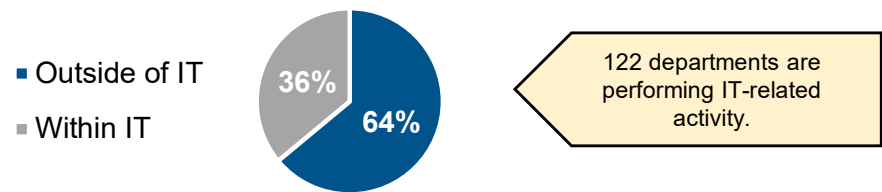
Conversations with stakeholders revealed that USU operates with optional central IT services, which has led to distribution. A centralized IT model yields more consistent services and increases satisfaction.

Case for Change

- **Rationale:** USU dedicates 136.5 FTE to IT, with the central unit contributing 47.8 FTE and departments contributing 89.2 FTE. A centralized IT model emphasizes consistent customer service and proper monitoring of activity, which leads to increased satisfaction and an avoidance of potential security risks.
- **Industry Practice:** The University of Texas Health at San Antonio operates under a centralized IT model with IT partners that act as a means of support for departments.
- **Prerequisites:** Current central IT services are expensive, which leads to many departments deciding to run it in house. Institutional leaders will need to emphasize the importance of risk mitigation and improved service delivery.

IT Activity Breakdown by Departments

IT Activity Distribution by Departments



Top Contributors to IT Services

Department	FTE	Percentage of Total IT FTE
Academic & Instructional Services	10.3	8%
Dean of EEJ College of Ed. & Human Services	4.8	4%
USU Blanding	4.8	4%
Dean of University Libraries	4.3	3%
National Ctr. Hearing Assessment & Mgmt.	3.8	3%

Budgetary Support (Snow College)

Snow's budgeting and financial management is highly distributed, which results in difficulties providing centralized support. A more centralized model will ensure that departmental needs are met.

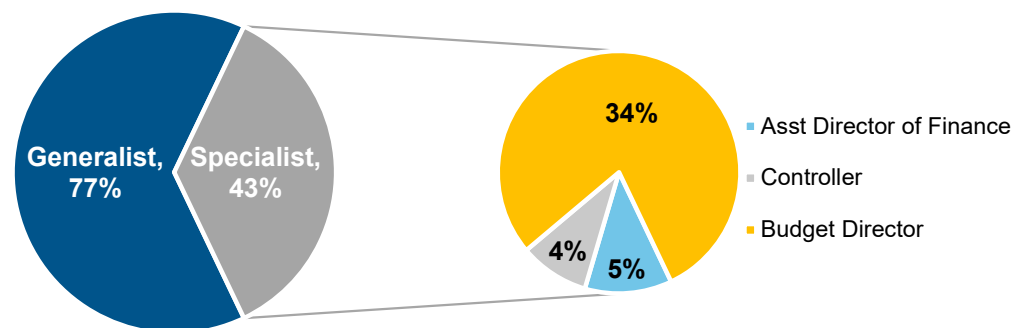
Case for Change

- **Rationale:** Snow stakeholders discussed that there is a gap between the central financial unit and departments, especially as it pertains to budgetary comprehension. Implementing tier 1 support that connects the departments to the central office will assist with communication gaps and increase understanding.
- **Industry Practice:** At the University of Texas Health at San Antonio, a community of financial leaders was developed around budgeting and planning as a means of support for departments.
- **Prerequisites:** Snow is currently undergoing a Chart of Accounts change, which is taking up much of financial capacity. Outside resources will potentially need to be used to implement this support model.

Note: Specialist titles are taken from HAAS data and could exclude employees who perform the same work but did not take the survey

Budgeting Support Specialization

Generalist vs. Specialist FTE



Only three finance specialists are contributing to budget-related work, which leads to comprehension gaps as individuals without financial expertise perform the activity.

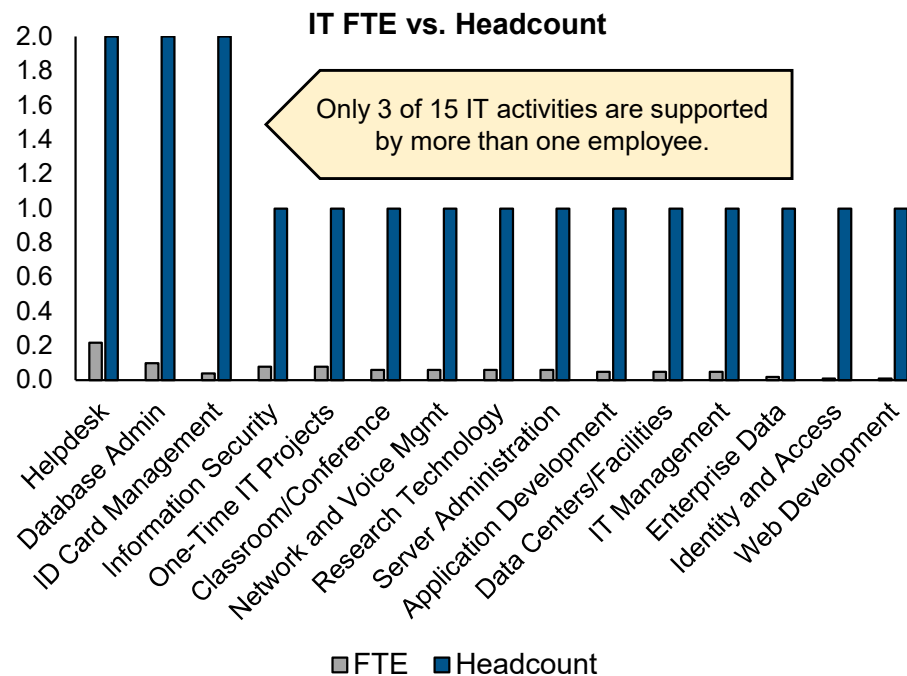
IT Investment (Tooele Technical College)

TTC dedicates less than 1 FTE to IT, with 90% of that effort from one individual. Given high reliance on IT services, investing more resources in IT services is required to maintain adequate service delivery.

Case for Change

- **Rationale:** Stakeholders cited an increased need for IT services due to the College’s growth. TTC should focus on investing in IT service delivery through an increase in resources, process automation, and an increase in collaboration when appropriate.
- **Industry Practice:** Institutions have moved to more automated processes in order to increase efficiency and create more time for collaboration to combat industry trends of a waning workforce and outdated technology.
- **Prerequisites:** To reinvest in IT-related activities, TTC will require a detailed plan and approach to ensure processes are appropriately defined and funneled through any new hires.

Employee Investment in IT

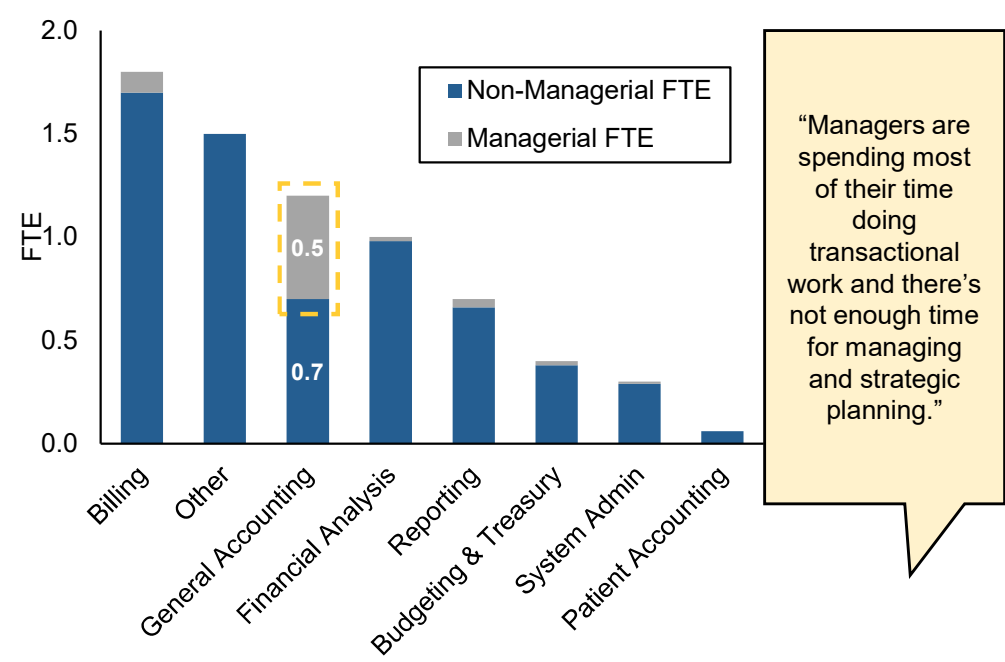


Transactional Activity (Mountainland Technical College)

Distribution of financial tasks has resulted in employees performing activity that falls outside of their responsibilities. Centralization and specialization will avoid resource overuse and increase capacity.

Case for Change Managerial Time in Financial Activity

- **Rationale:** Senior-level employees are spending almost half of their time performing transactional activities, particularly accounting transactions. Centralizing finance will ensure that transactions are properly reviewed, which increases capacity for managers to allocate their time to managing and strategic planning activities.
- **Industry Practice:** The University of Kansas sought shared services related to finance to enhance transaction-based activities and increase capacity.
- **Prerequisites:** Much of the transactional work is being performed by senior-level employees due to the lack of resources within MTC. Proper training is essential to ensure appropriate use of resources and to gain stakeholder buy-in.



“Managers are spending most of their time doing transactional work and there’s not enough time for managing and strategic planning.”

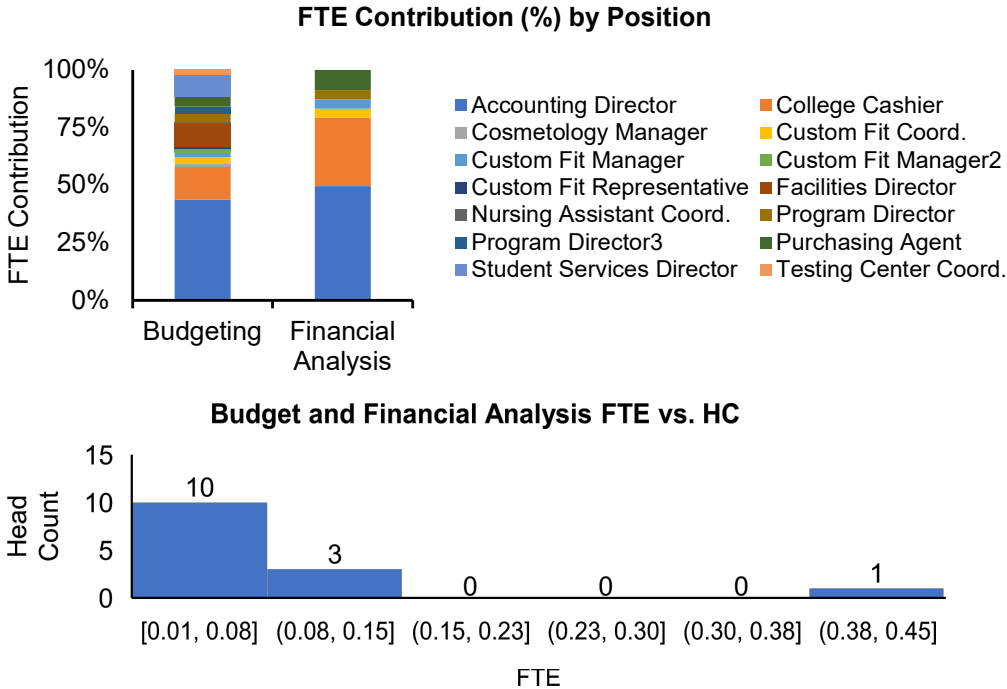
Notes: Senior-level employees were identified based on a titling analysis of key supervisory terms (e.g., Director)

Finance Specialization (Ogden-Weber Technical College)

Budgeting and financial analysis & planning are largely performed by unspecialized employees. Adding expertise through a dedicated position would increase service capabilities.

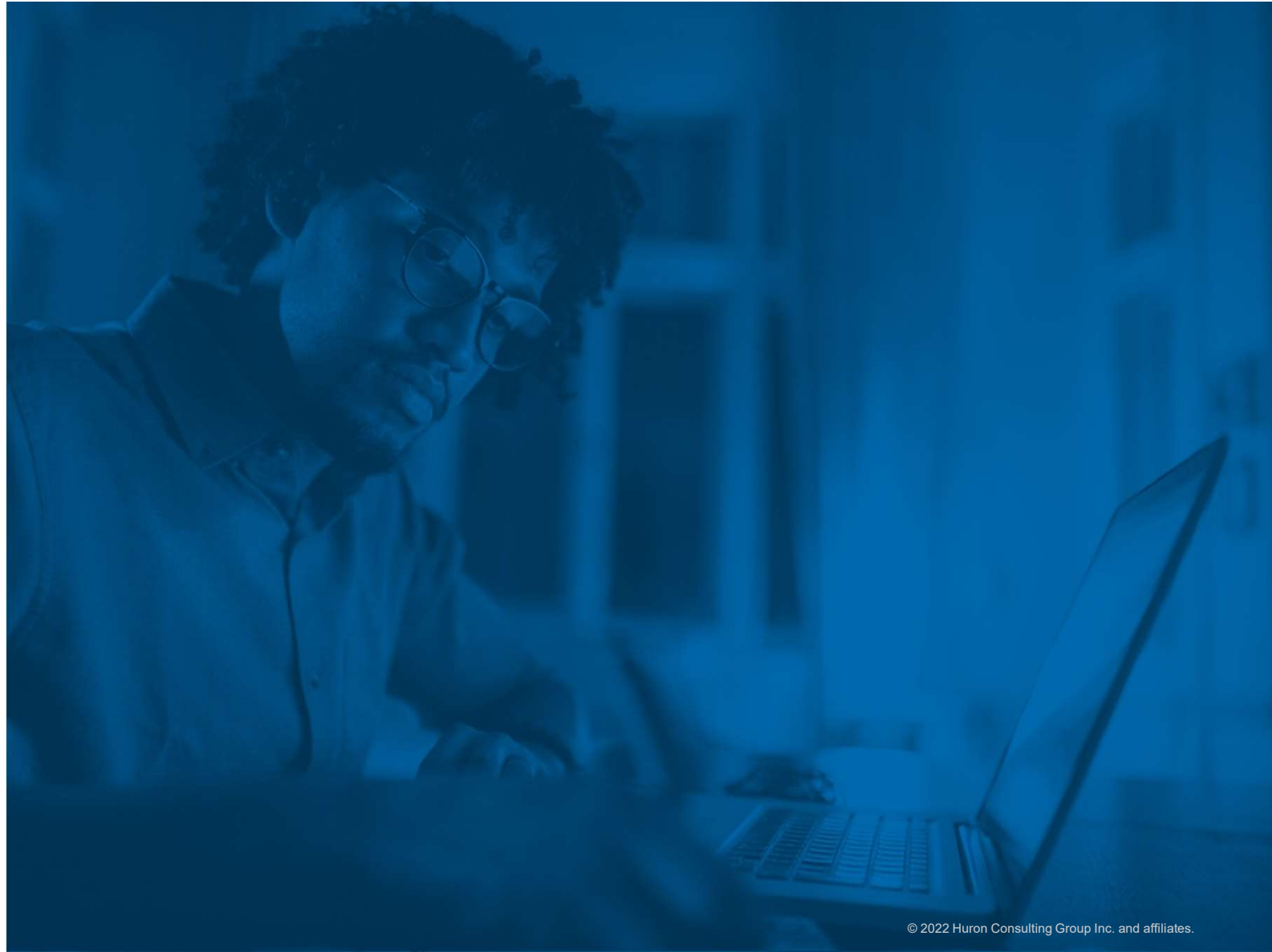
Case for Change	Budget and Financial Analysis Support
------------------------	--

- Rationale:** Budgeting and financial analysis & planning, two functions that are typically specialized, are performed without dedicated support, with just one employee spending more than 0.2 FTE in the areas combined. Either adding or redesigning the role of one position can add expertise to tactical financial functions.
- Industry Practice:** Budget and financial support specialists are common positions in higher education that institutions rely on for strategic decision making and analysis.
- Prerequisites:** A dedicated team member would be assigned specific areas of support. Additional process mapping and standardization can occur as needed to streamline and improve existing processes.



3

Organizational Risk & Readiness Assessment (ORRA)



Change Themes & Insights

Through the Study's stakeholder engagement and analysis, Huron has identified a set of foundational themes and insights that help describe USHE's current perspective on change.

Staff Capacity

1. Limited Staff Capacity

- In stakeholder discussions, USHE staff noted that capacity is particularly tight and resources are strained.
- Limited capacity can create obstacles to change efforts, both in terms of having available resources to support 'the work' and maintaining the cultural commitment to implementing the change.

Shared Structures

2. Gaps in Collaborative Infrastructure

- While there are select examples of shared, systemwide infrastructure, USHE stakeholders noted that there is still a need for more mature, integrated governance to manage systemwide efforts.
- A lack of clear ownership and collaboration can impact transparent accountability for change efforts.

Distinct Cultures

3. Strong Institutional Cultures

- USHE stakeholders highlighted that there are strong institutional cultures but not necessarily a consistent systemwide culture that spans multiple institutions.
- For multi-institution efforts, it is critical to build a shared culture that can serve as the core vision of the initiative.

Facilitated ORRA Discussion

Huron utilizes the Organizational Risk & Readiness Assessment (ORRA) to develop a comprehensive understanding of the core elements that impact change readiness.

PAST EXPERIENCE

- Which major changes in the past influence our future changes? How do those experiences influence our ability to change?

COMMUNICATION

- What aspects of our communication and collaboration influence our ability to change? Can we communicate effectively?

CULTURE

- What beliefs, behaviors, and norms do we have that influence our ability to change? How do we think and act about change?

PRIORITIES

- How do our priorities influence our ability to change? Do we have clear priorities?

ACCOUNTABILITY

- What practices around identifying, assigning, and supporting accountability influence our ability to change?

ALIGNMENT

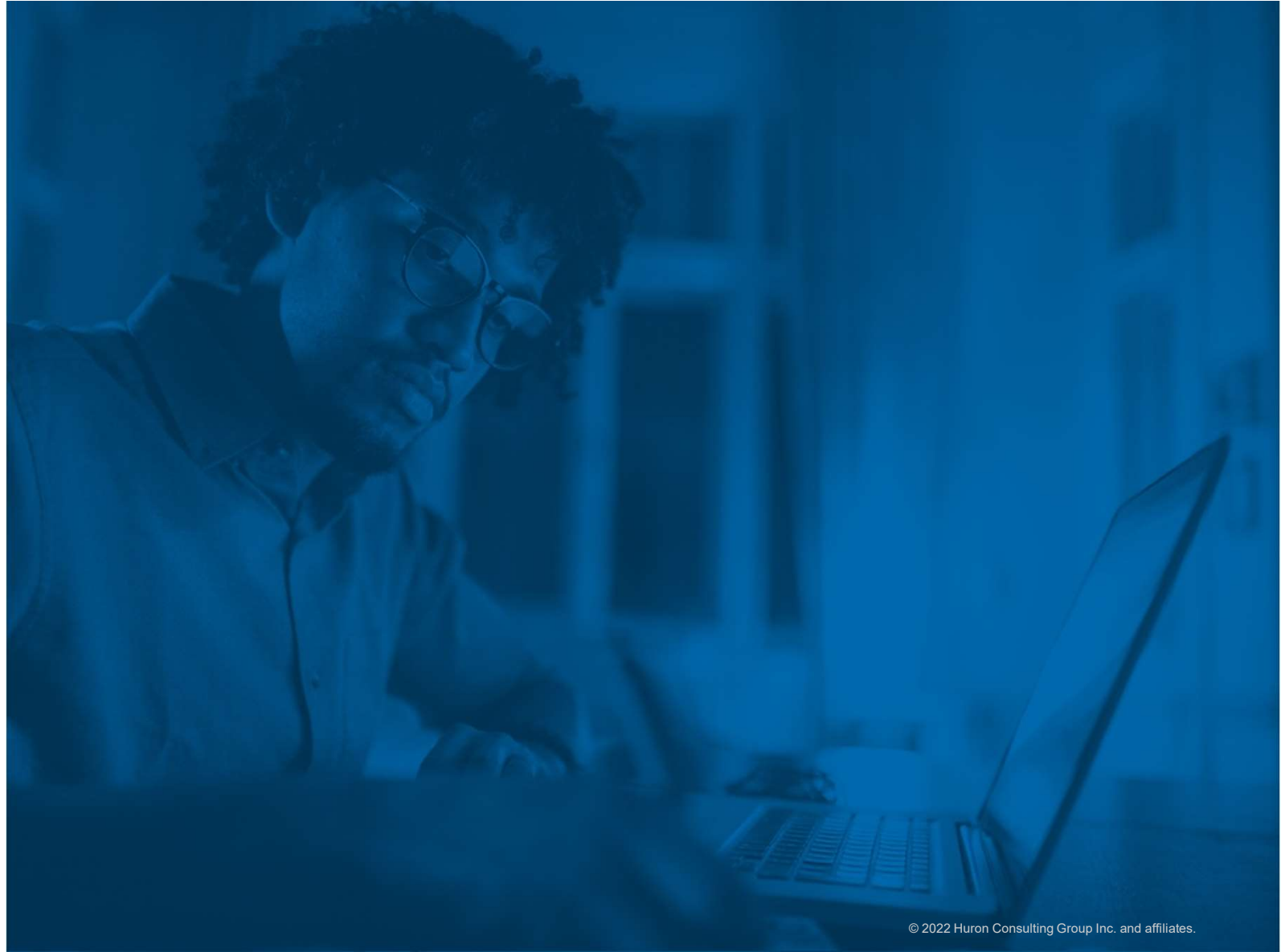
- What aspects of our structure and decision-making practices influence our ability to change? Are we organized to change?

PREPAREDNESS

- What talent (or talent gaps) do we have? How are our resources prepared (or not prepared) to drive change?

4

Next Steps



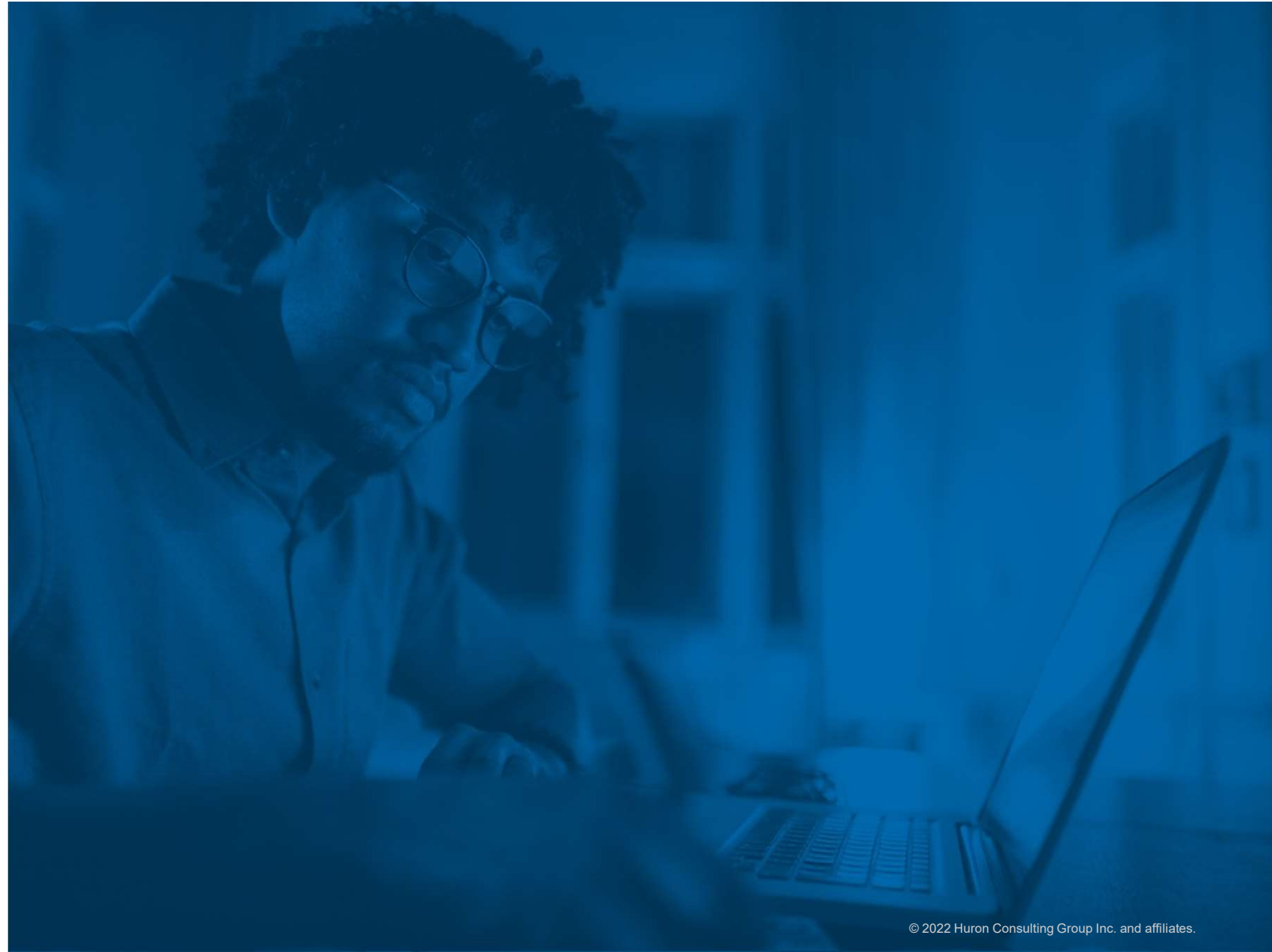
Next Steps

With Phase 2 complete, the USHE Shared Services Study will now narrow the focus to a select set of detailed cost benefit business cases, as well as provide institution-specific analysis.

- **Cost-Benefit Analysis:** Huron will develop business cases centered around high-potential opportunities, which will include details of the potential benefit (financial, operational, etc.) as well as key prerequisites and/or trade-offs required for implementation
- **Institutional Insights:** As a component of Phase 1 & 2 analyses, Huron is developing institution-level packets, inclusive of core HAAS insights and institution-specific opportunities derived from data analysis and stakeholder feedback

A

Appendix A: Environmental Scan



National Market Trends

Huron performed an external scan to identify key trends in higher education that, among other drivers, have led state systems to look towards shared or collaborative operations.



Enrollment

- The COVID-19 pandemic saw that enrollment declined across the industry, with some of the lowest numbers in a decade. This downward trend is likely to continue until the state of the virus finds some sort of stabilization.



Nature of Post-Secondary Education

- Successful remote-learning outcomes has led to an increase in hybrid classrooms.
- The cost of attending college continues to rise, causing families to contest the value of higher education.



Workforce

- The US economy is experiencing disruption as a result of the pandemic, as well as other factors including technology, automation, and internationalization.
- Working remotely has led to many employees choosing to live outside of their employed state.



External Funding

- State funding for higher education has increased but has yet to recover from the cuts made during the last recession.
- State-funded support leans towards bigger institutions, with four-year institutions receiving \$6,800 more per FTE than two-year institutions.¹

¹ Inside Higher Ed Statistics, 2021

Shared Service Insights

Based on this scan, Huron has identified specific insights that speak to the motivation and benefits that university systems seek by moving towards a shared service model.



People

Higher education institutions typically implement shared services to better support their employees through the standardization of responsibilities, more robust training, and the avoidance of additional and repetitive effort. As a result, employees feel valued and are better able to perform their duties.



Risk Mitigation

State systems often move towards shared services as a means of standardizing processes and policies. This ensures compliance and minimizes the risks that can arise in a more distributed operating setting that contains inconsistent and unstandardized practices.



Cost Avoidance

Peer state systems often provide shared services to cut potential costs. In doing so, institutions have more resources to dedicate to changing industry trends, such as a decreased work force, a call for more hybrid education, and a push for better student-driven services.



Process Improvement

Conversations with USHE stakeholders revealed that multiple processes are often outdated and redundant. Trends across state systems show that shared services results in more efficient processes, allowing institutions to focus on more mission-driven activity rather than administrative functions.

University System of New Hampshire

Overview

The University System of New Hampshire (USNH) implemented systemwide financial, research administration, and human resources shared services center in 2021. With procurement and information technology already centralized, these initiatives allowed USNH to operate in a highly collaborative, shared environment across all major functional areas.

Goals/Drivers

USNH had been trending towards shared services over the last decade but increased its pace in 2020, partially due to the impact of COVID. The new SSC both increased efficiency and lowered costs systemwide.

Key Takeaways

- Transactional support can be centralized across distinct institutions but must be cognizant of the uniqueness of each institution
- Broad and detailed stakeholder engagement is key to a successful change process

About the University System



Enrollment	Faculty	Staff
~30,000	1,175	6,000
Budget	Control	Carnegie Class
\$855 million	Public	N/A

University of Maine System

Overview

The University of Maine System (UMS) has a range of shared, systemwide functions, including the management of strategic procurement activities. The UMS System Office oversees all purchasing functions, including accounts payable, sourcing, travel, and compliance, and provides customer service systemwide. UMS sought shared accreditation in 2020 to decrease barriers to collaboration.

Goals/Drivers

The University of Maine System pursued shared services as a means of increasing process efficiencies across its 8 institutions as well as securing cost savings.

Key Takeaways

- Governance and other structural barriers like accreditation can be major variables in the success of a shared initiative
- Securing early wins (ex: procurement) is essential to success

About the University System



Enrollment	Faculty	Staff
~30,000	2,150	3,350
Budget	Control	Carnegie Class
\$3.3 million	Public	N/A

University System of Georgia

Overview

The University System of Georgia's (USG) Shared Services Center (SSC) provides functional and transactional support in HR and payroll across the System's 26 institutions. More specifically, this support involves streamlining processes, monitoring and managing compliance risks, and allowing institutions to better focus on student-driven activities.

Goals/Drivers

The SSC was implemented to drive USG's 26 institutions to be more efficient and accessible by centralizing and standardizing certain administrative functions.

Key Takeaways

- Developing a leadership body with institutions from across the state system is essential in gaining buy-in from internal stakeholders
- Centralized processes should consistently be updated and defined

About the University System



Enrollment	Faculty	Staff
~340,000	12,272	53,743
Budget	Control	Carnegie Class
\$7.6 billion	Public	N/A

University of Michigan

Overview

The University of Michigan (U-M) implemented shared services to decrease administrative burden from faculty and staff. The SSC supports HR and finance, with a focus on innovative strategies, practices, and approaches related to transaction processing. Since implementing the SSC, U-M has continuously looked to update and expand their offerings, with a recent reorganization in 2021.

Goals/Drivers

The University of Michigan sought shared services as a means to increase efficiencies and build a more customer-centric strategy across their three campuses.

Key Takeaways

- Developing a user-friendly web-page increases customer satisfaction
- Inquiries and/or feedback should always be looked at as a learning opportunity for better service delivery

About the University



Enrollment	Faculty	Staff
~68,500	7,000	26,500
Budget	Control	Carnegie Class
\$4 billion	Public	Doctoral

State University of New York (SUNY)

Overview

SUNY implemented a Security Operations Center (SOC) that provides expertise, training tools, and resources around information security to the 64 institutions within the system. Institutions can partake in two services: Base Membership, which is offered to all institutions, and A La Carte, which provides additional services that go beyond base services at an additional cost.

Goals/Drivers

The SOC was developed to provide all institutions with cost-effective tools and services, a community of practice, an objective view for information security ideas and initiatives, and a centralized perspective.

Key Takeaways

- Establishing a governance structure that involves a broad array of stakeholders ensures accurate representation across the system
- Cost tiers can create increased participation from all institutions

About the University System



Enrollment	Faculty	Staff
~350,000	15,000	60,000
Budget	Control	Carnegie Class
\$11.9 billion	Public	N/A

University of Wisconsin System

Overview

The University of Wisconsin System (UW) shared services support HR, procurement, and service operations. More specifically, the services provide leadership, guidance, functional expertise, policy development, payroll, and benefits support. UW implemented this model in 2020, rolling it out to 26 institutions.

Goals/Drivers

The University of Wisconsin System strove to increase administrative efficiencies and service delivery through better supported HR, payroll, benefits, business services, and reporting services.

Key Takeaways

- Creating a website for systemwide communication ensures that stakeholders stay up to date and understand service offerings
- Creating functional specialization supports system-wide standardization and collaboration

About the University System



Enrollment	Faculty	Staff
~190,000	8,000	33,500
Budget	Control	Carnegie Class
\$4.8 billion	Public	N/A

University of Kansas

Overview

The University of Kansas (KU) implemented shared services related to HR and finance. Within HR, the services support recruitment, onboarding, appointment maintenance, time review and GRA/GA appointments. While in finance, the services support travel and expense, procurement/AP, candidate and honorarium, tuition and scholarships, and deposits.

Goals/Drivers

KU sought shared services to enhance transaction-based activities by providing more timely and accurate service across the institution's five campuses.

Key Takeaways

- It's essential to have an initial identification of needs in order to tailor the design to an institution
- Clear communication and cooperation maintains overall satisfaction

About the University



Enrollment	Faculty	Staff
~28,000	3,000	9,000
Budget	Control	Carnegie Class
\$1.1 billion	Public	Doctoral

Ohio State University

Overview

Ohio State University's (OSU) Office of Academic Affairs (OAA) provides direct support through four core shared service areas: fiscal services, HR, IT, and communication. The staff within these areas support internal operations and key partnerships throughout the university, increasing efficiencies through faster processing and service request response rates.

Goals/Drivers

OSU sought shared services to leverage greater economies of scale, realize meaningful cost savings, mitigate compliance risk, and improve career progression options for employees.

Key Takeaways

- Shared Service Centers can be cross-functional in nature
- Niche compliance can be better maintained via centers of expertise rather than broader shared service centers

About the University



Enrollment	Faculty	Staff
~60,000	6,500	35,000
Budget	Control	Carnegie Class
\$3.2 billion	Public	Doctoral

University of California, Berkeley

Overview

In 2015, the University of California, Berkeley implemented shared services to replace their highly decentralized model. Berkeley launched a single regional center providing HR, IT, research administration, and finance support for the units. The University saved approximately \$15M after the centers were fully implemented.

Goals/Drivers

The University sought shared services to reduce redundancy, increase staff development opportunities, streamline rogue policies and procedures, and clarify staff roles.

Key Takeaways

- Implementation support services are critical in supporting departments in any necessary internal reorganization
- Financial incentives at the unit level increased buy-in and support

About the University



Enrollment	Faculty	Staff
~42,000	3,000	12,000
Budget	Control	Carnegie Class
\$3 billion	Public	Doctoral

University of California System

Overview

The University of California System (UC System) has implemented numerous shared service centers that range in scope and function. Some shared services are limited to their local institution while some support the entire ten campus system. The UiPath Center manages payroll and HR across the system, UC Santa Cruz has their own IT SSC, and UC Recruit supports faculty recruitment across the system.

Goals/Drivers

The UC System sought shared services to develop more efficient, cost saving processes that would result in better collaboration both at the institution and system level.

Key Takeaways

- Implementing shared services at the institution level serves as an effective “test-run” for the system-level integration
- Systemwide common business process create new opportunities

About the University System



Enrollment	Faculty	Staff
~280,000	20,000	106,000
Budget	Control	Carnegie Class
\$41.6 billion	Public	N/A

University of Missouri System

Overview

The University of Missouri System implemented shared services to support their finance and procurement functional areas, with a specific focus on Accounts Payable. These services provide transactional processing support across the four campuses that make up the state system. Such transactions include PO vouchers, Non-PO vouchers, travel and expense, and suppliers.

Goals/Drivers

Shared services were sought to provide human capital and systems that ensure payments are made in a timely, accurate, and compliant manner so that the System's departments can focus on mission-driven work.

Key Takeaways

- Providing an estimated time frame for specific transactions assists with buy-in from stakeholders
- 'FAQs' and 'How To' aids avoid customer frustration and confusion

About the University System



Enrollment	Faculty	Staff
~80,000	3,200	160,000
Budget	Control	Carnegie Class
\$1.8 billion	Public	N/A

Connecticut State Colleges & Universities

Overview

The Connecticut State Colleges and Universities (CCSU) delivers HR via shared services across its 17 recently merged community colleges and four-year institutions. More specifically, the services focus on providing the following HR services: onsite assistance to employees, labor relation guidance and development, classifications, compensations, benefits, and recruitment and talent acquisition.

Goals/Drivers

The shared services are delivered through a Center of Excellence (COE) model, with a focus on driving operational improvements and promoting a culture of continuous growth and development.

Key Takeaways

- Standardization of policies and processes assists with maintaining cultural balance across diverse institutions
- Clear and efficient service delivery ensures understanding

About the University System



Enrollment	Faculty	Staff
~105,000	2,000	10,000
Budget	Control	Carnegie Class
\$1.3 billion	Public	N/A

University of Illinois System

Overview

The University of Illinois System established a Business Shared Service Center that provides a pool of staff with expertise on administrative areas. The areas of service within the SSC include business/finance solutions, instructional design, ability LMS support, online conference and events, change management, communications, project management, and process improvement.

Goals/Drivers

The goal of the services was to provide expertise that surpasses what is available within the units, establish a support structure, and provide processes and methods that have been proven in the environment.

Key Takeaways

- External expertise ensures that processes are efficient and reliable across the system
- Shared resources can elevate service delivery universally

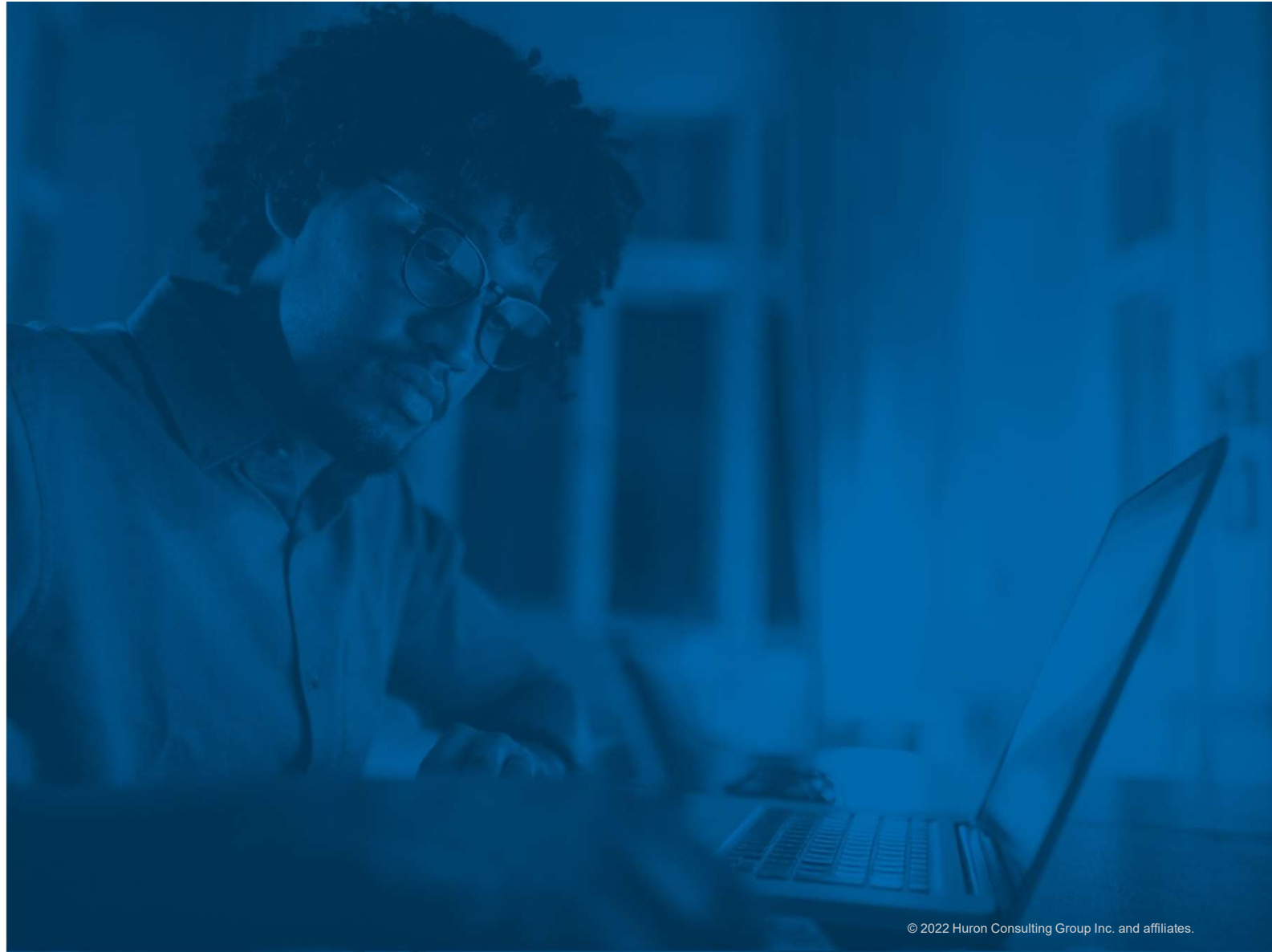
About the University System



Enrollment	Faculty	Staff
~100,000	5,000	27,000
Budget	Control	Carnegie Class
\$4.4 billion	Public	N/A

B

Appendix B: Phase 1 Report








Project Updates

As of December 2021, Huron is winding down data collection and pivoting fully into opportunity development, inclusive of workgroup engagement.

- **HAAS Completion:** HAAS has officially been completed across all institutions, with a systemwide response rate of 76%
- **Workgroup Progress:** Huron has facilitated discussions with 13 distinct workgroups across the system, focusing on opportunities within specific functional areas (ex: benefits administration)
- **Opportunity Development:** With all core data collected, the project team is now fully focused on opportunity development and analysis

Activities Overview

The first phase involved a set of activities that aimed to provide a clearer understanding of systemwide operations and better contextualized the Study's purpose with institutional leaders.

				
<p>DATA REQUEST Operational and functional data was requested from all institutions to support Study findings</p>	<p>HAAS HAAS was deployed to collect data on how employees spend their time on everyday activities</p>	<p>INTERVIEWS Huron conducted 115 interviews across all 16 institutions and their corresponding functional areas</p>	<p>PROJECT WEBSITE A website was developed to provide an overview of the project and create a space to submit feedback</p>	<p>OFI SURVEY The Opportunities for Improvement survey helped identify which activities have the greatest potential for improvement</p>

HAAS Overview




The Huron Administrative Activity Study will provide detail for opportunity areas by quantifying the scale, distribution, fragmentation, and consistency of administrative effort.

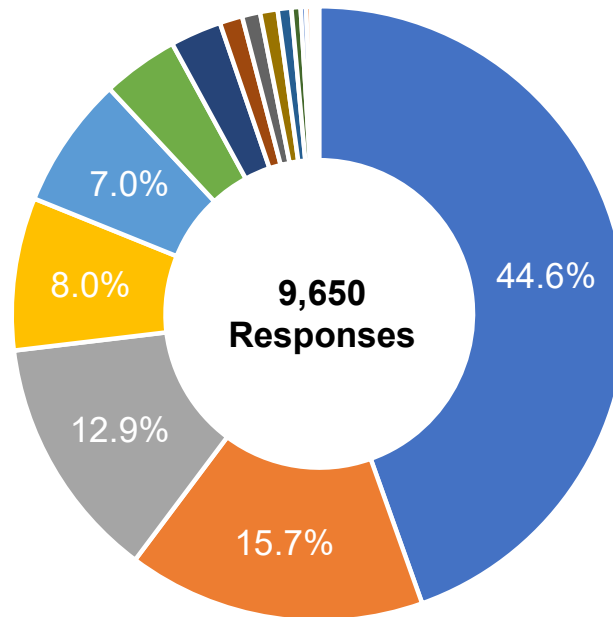
16 Functional Categories	SCALE	What is the effort and financial investment of activities relative to the level of service?
150 Activities	DISTRIBUTION	How is work distributed across the System?
~\$817.8M Administrative Compensation	FRAGMENTATION	Where can we improve professionalization vs. "wearing many hats" delivery models?
~9,194.4 Administrative FTE	CONSISTENCY	How consistent are roles that perform the same activities?

Study Response Overview

The Administrative Activity Study gathered data from stakeholders across all 16 institutions to develop a comprehensive view of activity across the entire USHE System.

Response by Institution

-  16 presidential communications
-  300+ webinar viewings
-  76% completion

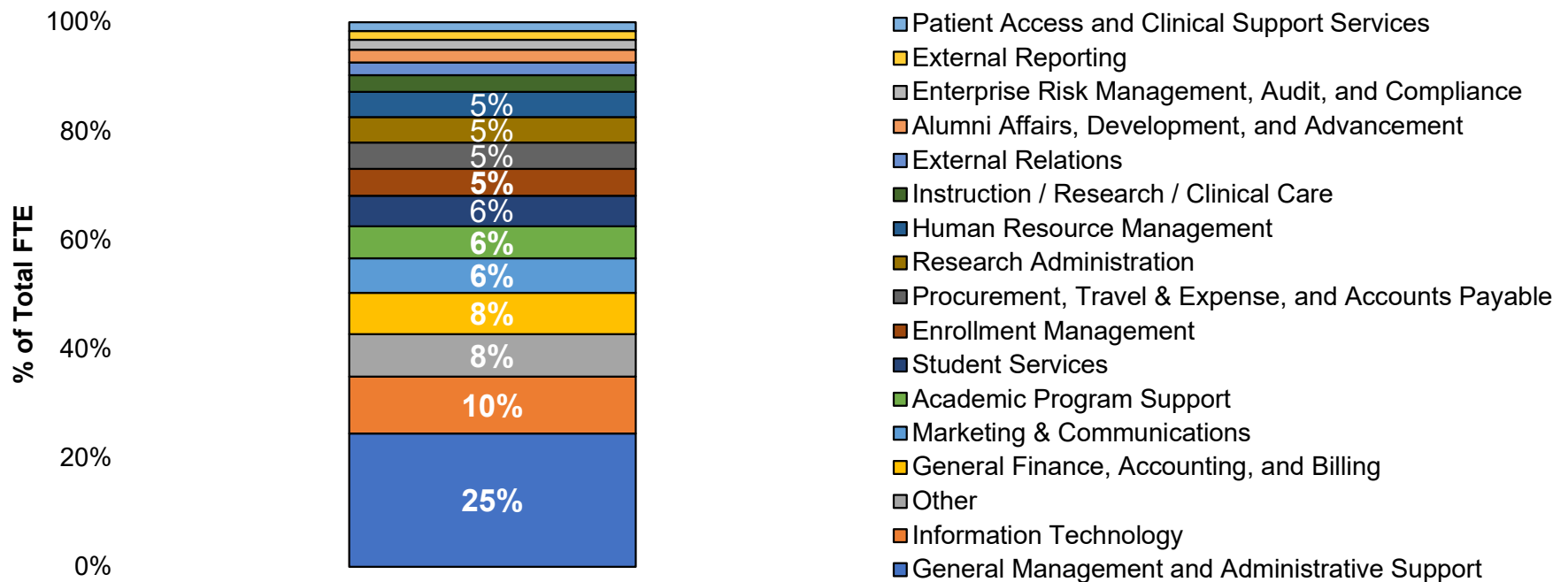


- University of Utah
- Utah State University
- Utah Valley University
- Weber State University
- Salt Lake Community College
- Southern Utah University
- Dixie State University
- Snow College
- Mountainland Technical College
- Davis Technical College
- Bridgerland Technical College
- Ogden-Weber Technical College
- Southwest Technical College
- Tooele Technical College
- Dixie Tech
- Uintah Basin Technical College

USHE Activity Distribution

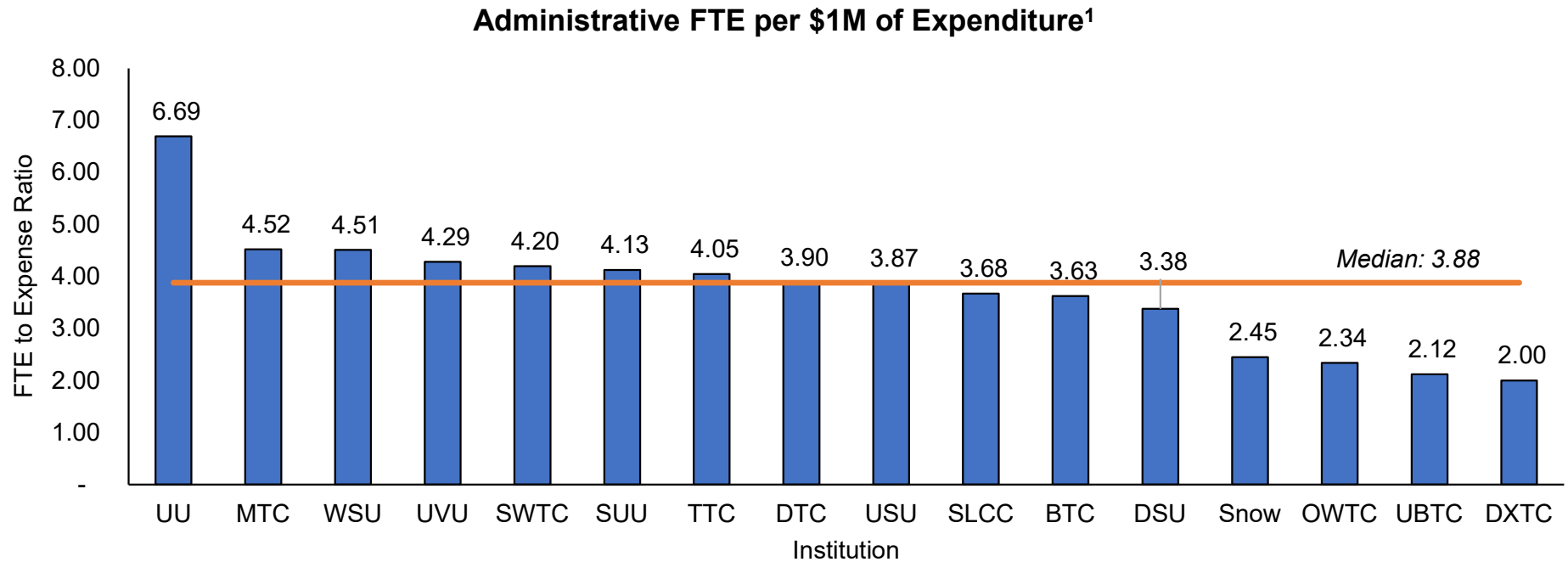
The cumulative effort for the Administrative Activity Study respondents represents ~\$817.8M in compensation and 9,194 FTE across 16 functions.

Total FTE Investment in Administrative Activity: All Institutions



Institutional Administrative Scale

The level of administrative support varies across institutions, and institutional categories, which highlights opportunities for more granular assessments of administrative efficiency.



¹Source: Expenditure is FY2020 annual expenditure per [USHE Institutional Data Resources](#)

Institutional Operating Profiles

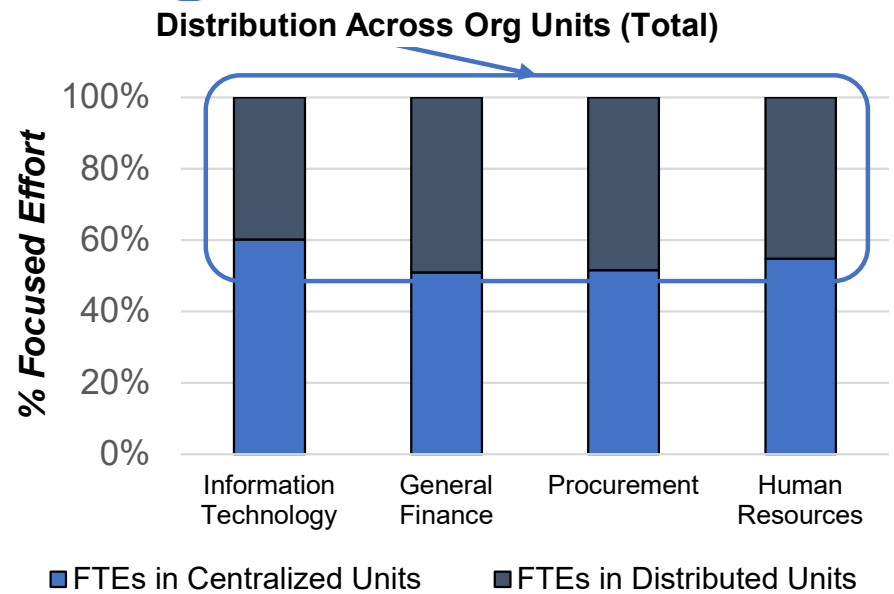
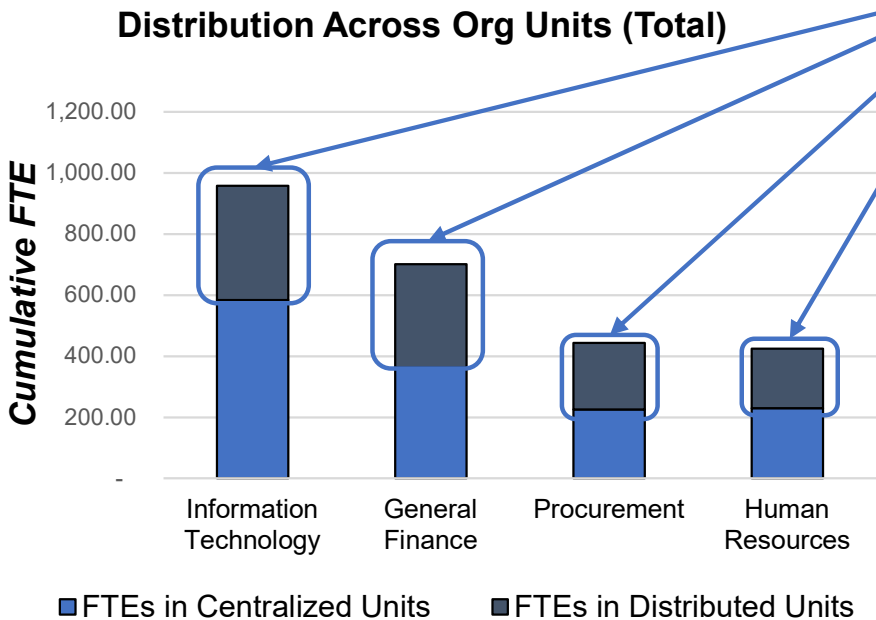
USHE institutions operate with unique operating profiles with varying levels of support developed organically through growth.

Institution Type	General Finance	Human Resources	Information Technology	Procurement
Total Four-Year FTE	630.5	378.6	905.1	402.3
Range of FTE across the 7 Four-Year Institutions	8.5 – 338.1	7.7- 191.2	11.3 – 501.9	5.7 – 190.3
Total Two-Year FTE	71.4	46.4	52.7	41.9
Range of FTE across the 9 Two-Year Institutions	1.0 – 41.1	1.4 – 31.2	1.6 – 22.5	1.0 – 23.4
TOTAL FTE	701.9	425.0	957.8	444.2

Centralization vs Distributed Activity

USHE institutions often provide centralized services and allow units to create parallel operations for the same services, a business practice that can create inefficiencies and increase risk.

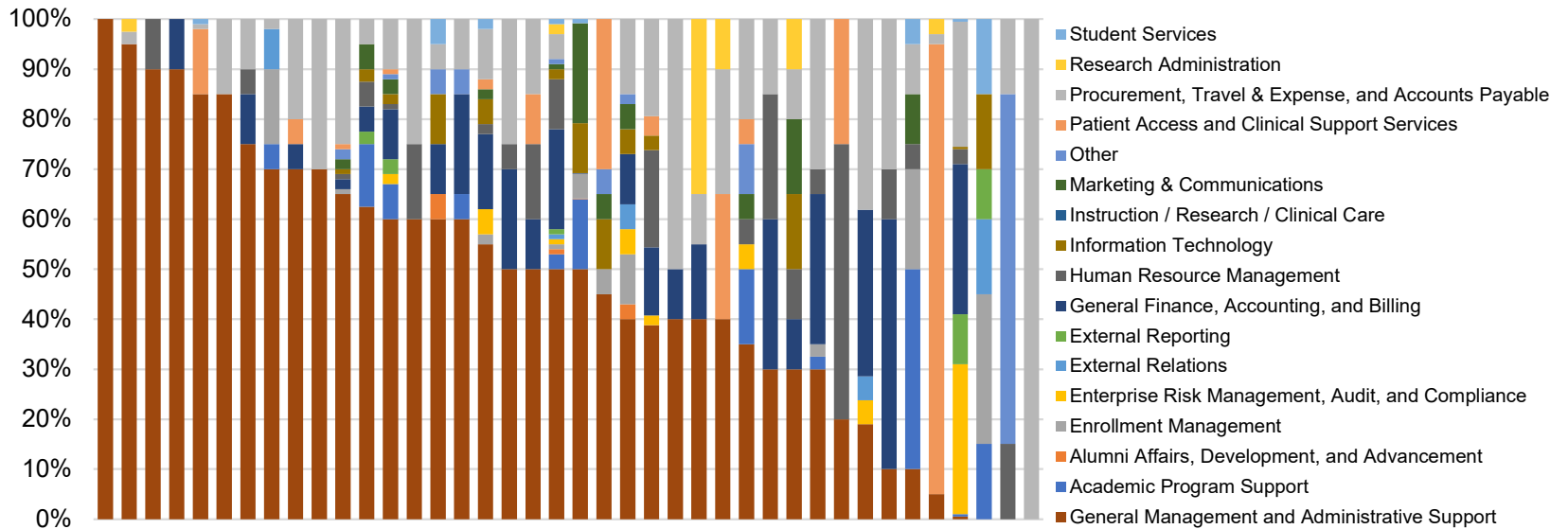
Approximately even allocations of activity and specialists between central and distributed units suggests duplication of operations



Fragmentation and Consistency: University of Utah

Administrative assistants at the UU “wear many hats” and have inconsistent job duties, which can create inconsistencies in compensation and equity practices. This finding is mirrored systemwide.

**Role Comparison (by Function):
Sample of UU Administrative Assistant Job Code**



This analysis includes 40 of 116 Administrative Assistant positions.

Interview Quote:
“We are lacking resources and often find ourselves asking our people to become multidisciplinary.”

Glossary of Terms

Below is a glossary of terms to utilize as a reference point when reviewing outputs/insights generated via the Huron Administrative Activity Study analysis.

Term	Definition
Functional Area	One of sixteen categories for work performed by employees
Distribution	The extent to which a given functional area is spread across contributing areas
Fragmentation	The extent to which a given employee's effort is allocated across different functional areas
Specialized Employee	An employee that spends 50% or more of their effort in one functional area
Generalist Employee	An employee that does not spend 50% or more of their effort in a functional area
Centralized Unit	Administrative units with reporting lines to their respective functional lead. An example is a finance unit reporting up to a CFO
Distributed Unit	Units that may perform some level of administrative work that do not report to the corresponding functional lead. For example, units in academic affairs are largely considered distributed



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UTAH SYSTEM OF
HIGHER EDUCATION

Phase 3 Report

USHE Shared Services Study



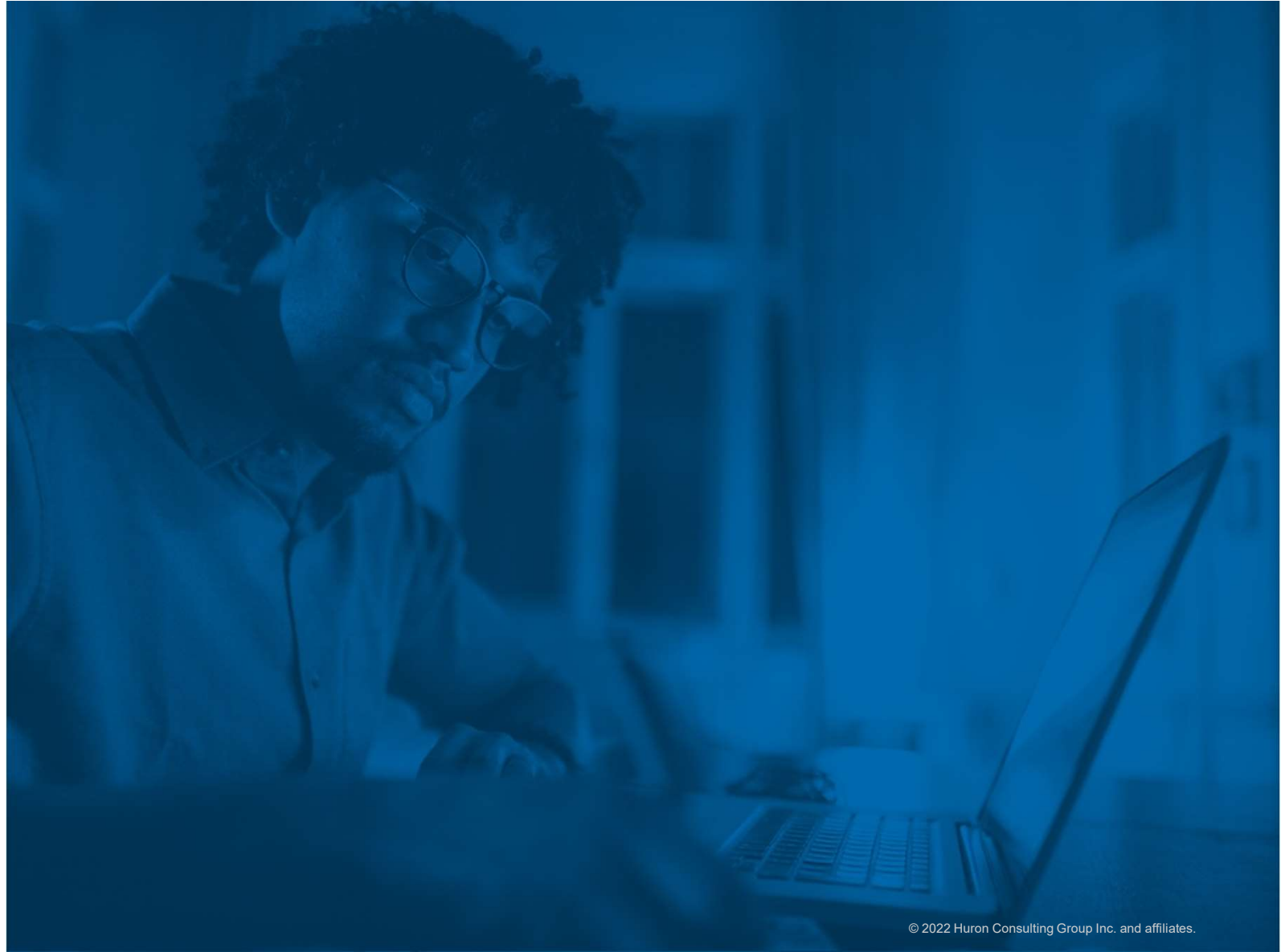
huronconsultinggroup.com

Agenda

1. Executive Summary
2. Core Enablers of Shared Services
3. Business Cases

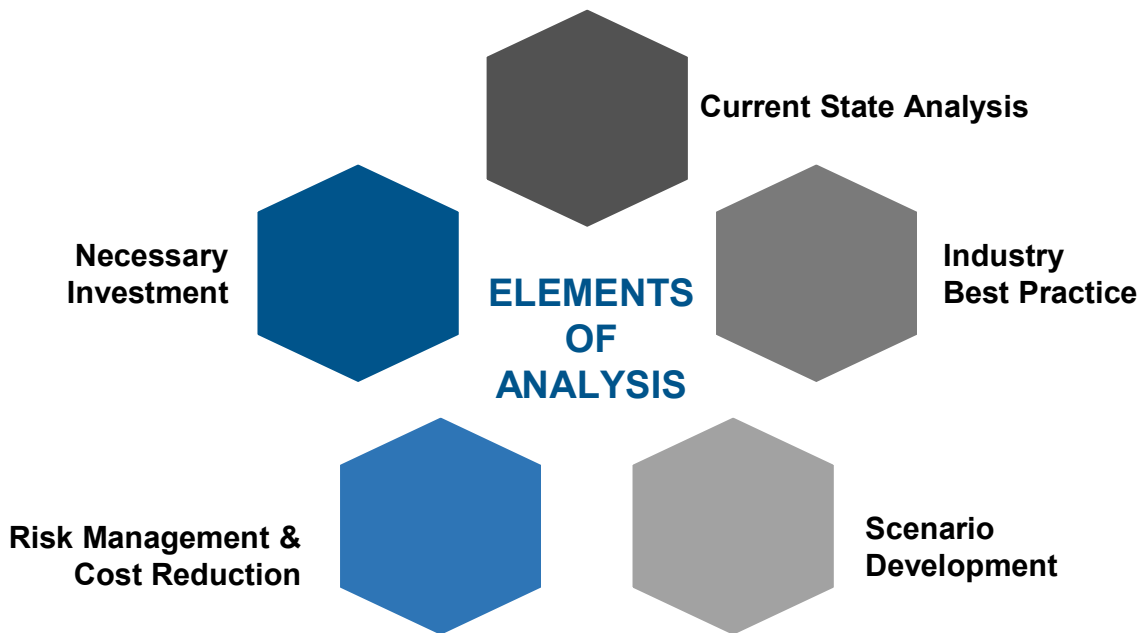
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Executive Summary



Phase 3 Overview

Phase 3 analyses have integrated additional data elements, information gathering, and scenario development to provide a foundation for decision-making and further stakeholder discussion.



Phase 3 presents a comprehensive assessment of the key elements that USHE should consider as it begins to make decisions around further design and implementation of desired opportunities.

Business Cases

In partnership with USHE leadership, Huron has developed 7 business cases, each detailing a unique, impactful recommendation for the System to consider.

Business Case
1) Security Operations Center
2) Procurement Operating Model
3) Payroll
4) Compensation & Classification
5) Shared Benefits Administration
6) Employment Law
7) Talent Acquisition

USHE Insights

Through the Study's stakeholder engagement and analysis, Huron has identified a set of insights that help describe USHE's current perspective on change and have informed the Phase 3 opportunities.

Staff Capacity

1. Limited Staff Capacity

- In stakeholder discussions, USHE staff noted that capacity is particularly tight, and resources are strained
- Limited capacity can create obstacles to change efforts, both in terms of having available resources to support 'the work' and maintaining the cultural commitment to implementing the change

Shared Structures

2. Gaps in Collaborative Infrastructure

- While there are select examples of shared, systemwide infrastructure, USHE stakeholders noted that there is still a need for more mature, integrated governance to manage systemwide efforts
- A lack of clear ownership and collaboration can impact transparent accountability for change efforts

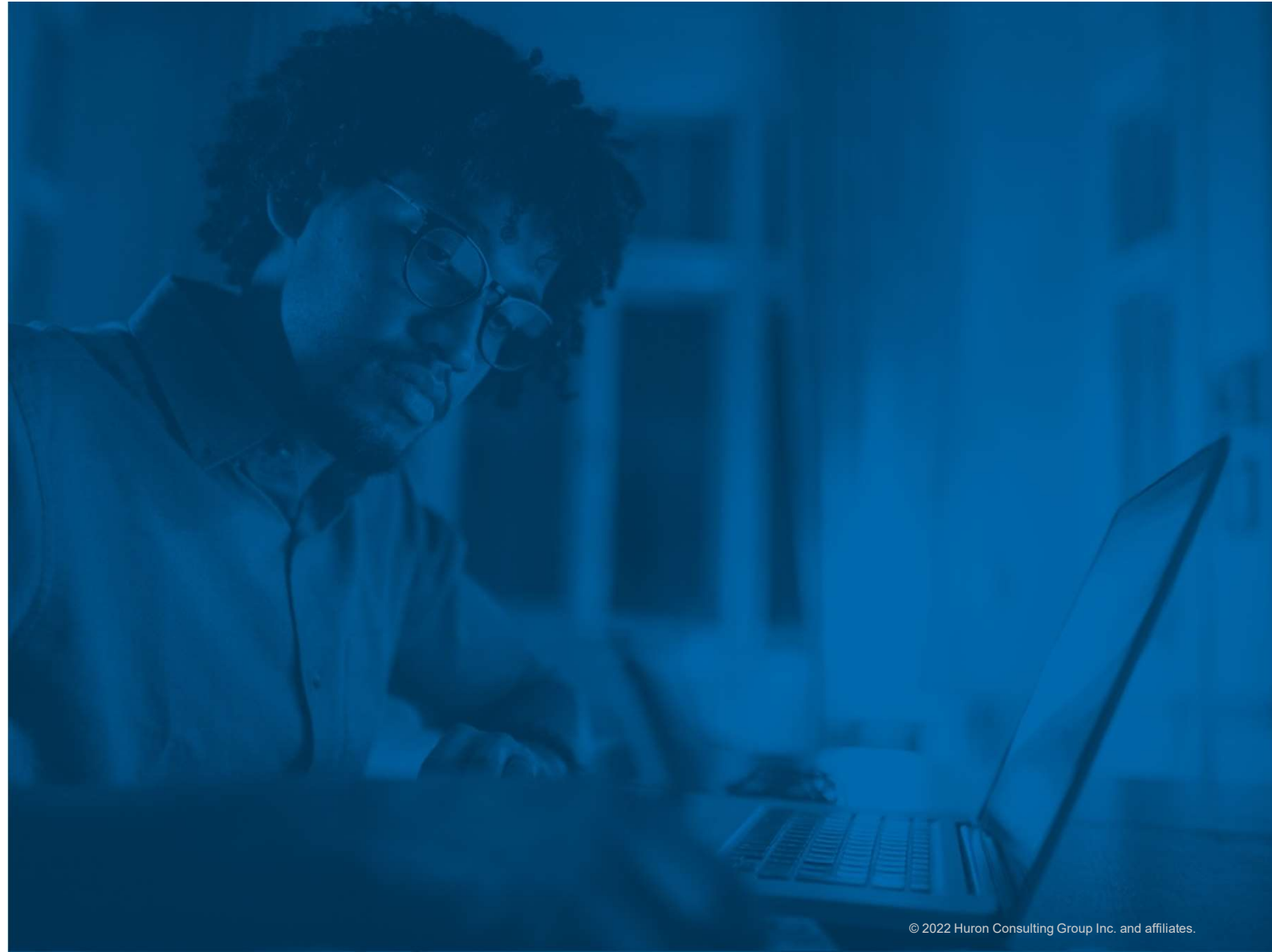
Distinct Cultures

3. Strong Institutional Cultures

- USHE stakeholders highlighted that there are strong institutional cultures but not necessarily a consistent systemwide culture that spans multiple institutions
- For multi-institution efforts, it is critical to build a shared culture that can serve as the core vision of the initiative

2

Core Enablers of Shared Services



Overview

In order to successfully implement multi-institutional opportunities, USHE must engage in a set of foundational activities that enable institutions to share resources & services effectively.



SYSTEM GOVERNANCE

Defining mechanisms for collaboration and establishing an infrastructure to drive & oversee change



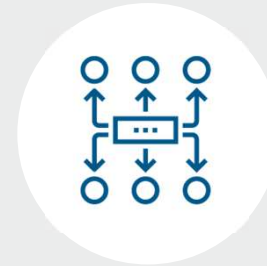
POLICY STANDARDIZATION

Develop a consistent policy infrastructure to allow for a foundation of compliance and procedure



TECHNOLOGICAL CONSISTENCY

Identify key technologies to adopt systemwide, enabling increased data sharing and support

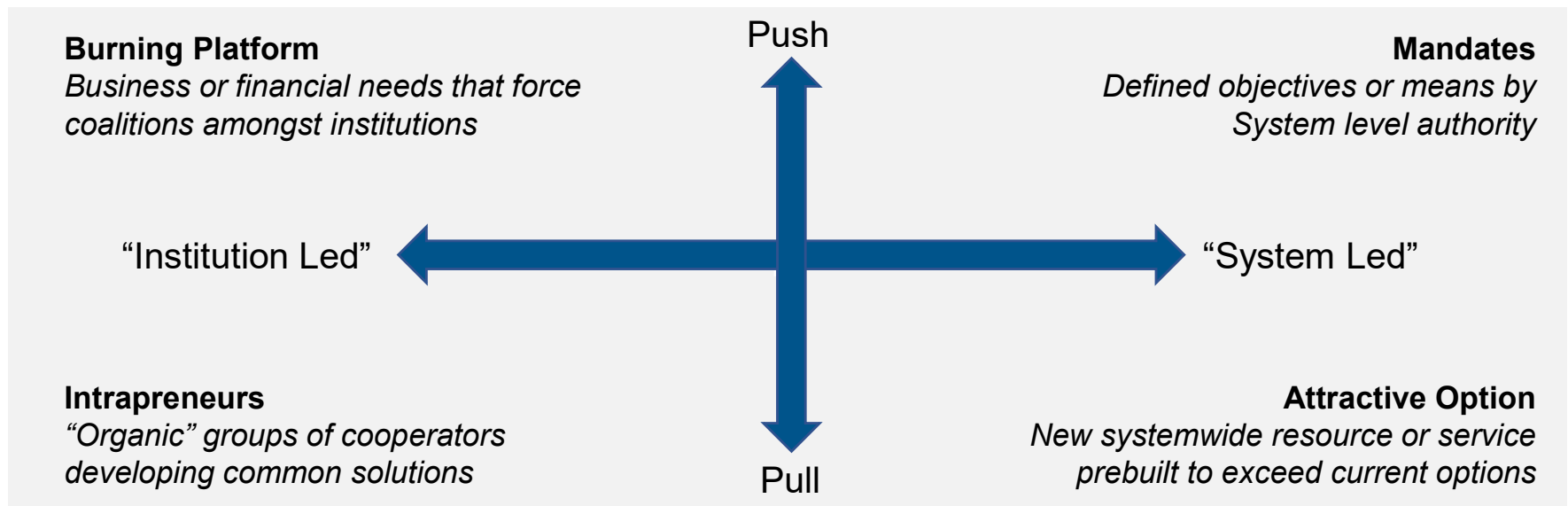


PROCESS REDESIGN

Standardize processes around shared resources to create efficiency in service

System Governance

USHE's governance emphasizes institutional independence, making the outcomes of coordinated initiatives highly dependent upon governance and the mechanism for creating collaboration.

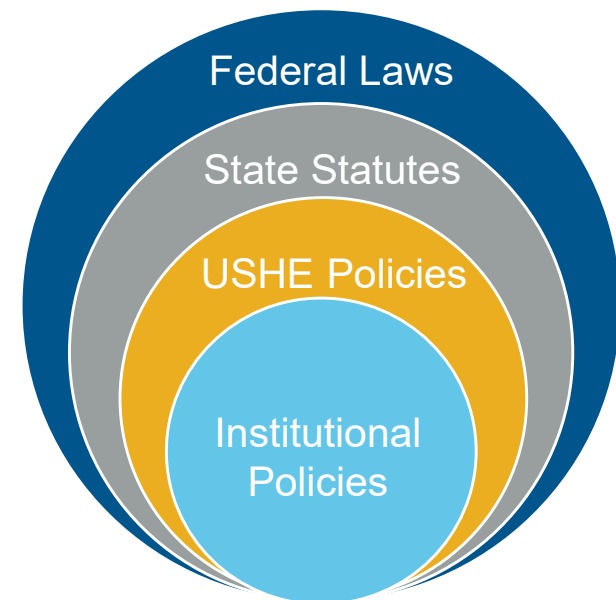


Collaboration across institutions will require a defined strategy, supported by formalized governance, around how USHE will manage change.

Policy Standardization

Productive partnership across USHE institutions is reliant on the standardization of policies in order to eliminate the confusion that comes from institutional gaps and contradictory compliance expectations.

- Current USHE operations depict **varying policies across the System**, which has led to difficulty in systemwide engagements.
- Before standardization can happen at the System level, select institutions will have to first **standardize at the local level**.
- Without clear delineation of policy, systemwide technology and processes will be challenged to progress which will **result in decreased efficiency**.
- Policies that vary across institutions present potential risks for perceptions of unfairness which **harms employee morale**.

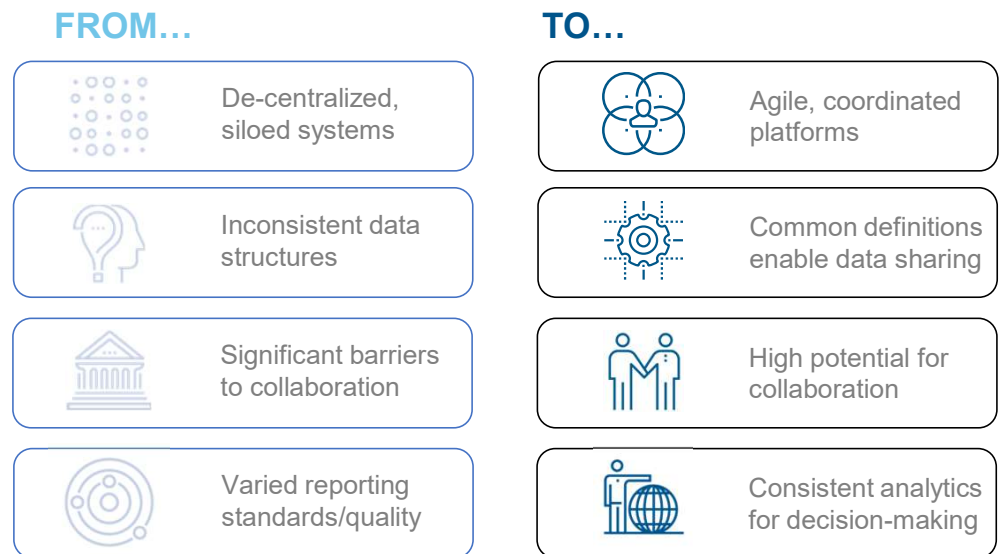


Multi-institutional opportunities will require alignment and standardization of policies to ensure that shared operations can apply consistent and equitable standards.

Technology Consistency

USHE utilizes a wide variety of technological platforms across in-scope functional areas. For select opportunities, shared services will require adoption of a singular platform across USHE institutions.

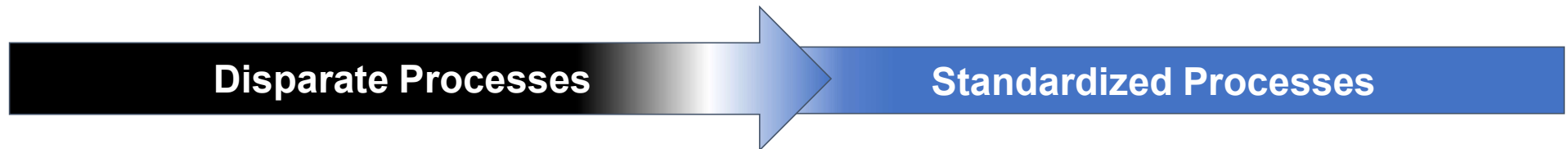
- Technology dictates process, required resources, and foundational data structure
- Shared services with non-standard platforms necessitates layers of translation/integration, which greatly decreases efficiency
- Singular technology allows for cost savings via increased buying power



Significant multi-institutional collaboration across USHE must be grounded in a move towards consistency in technological platforms.

Process Redesign & Standardization

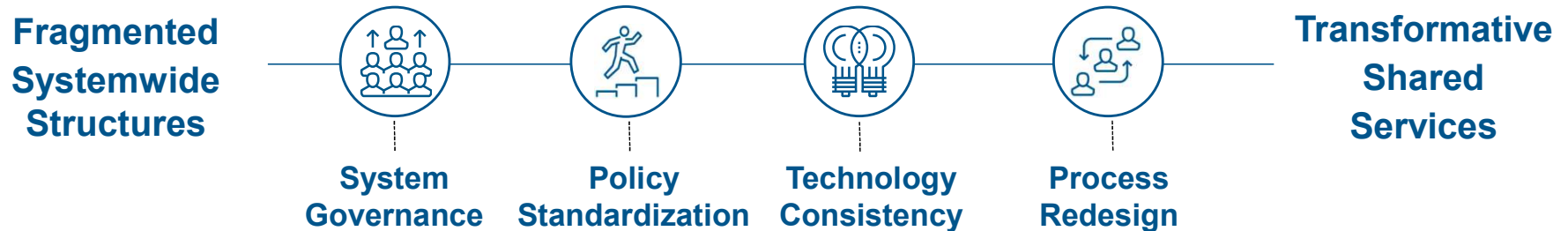
Multi-institutional shared services require standardized processes and procedures in order to create consistency of services and enable collaboration across distinct USHE institutions.



- 1 Process redesign is grounded on detailed mapping of current state processes in order to understand current state workflow and identify areas where units/populations require unique or exception-based processes (e.g., research)
- 2 Engage a set of systemwide subject matter experts to redesign processes around future state structures, leveraging industry best practice and technology to increase efficiency and develop consistency in service
- 3 Design and deploy a process transition plan, including communication and engagement with impacted populations, role-based training curricula, and the development of job aids/support pathways to support adoption

Process standardization will be a required element for USHE shared services, ensuring that distinct institutions align on workflow for shared resources and structures.

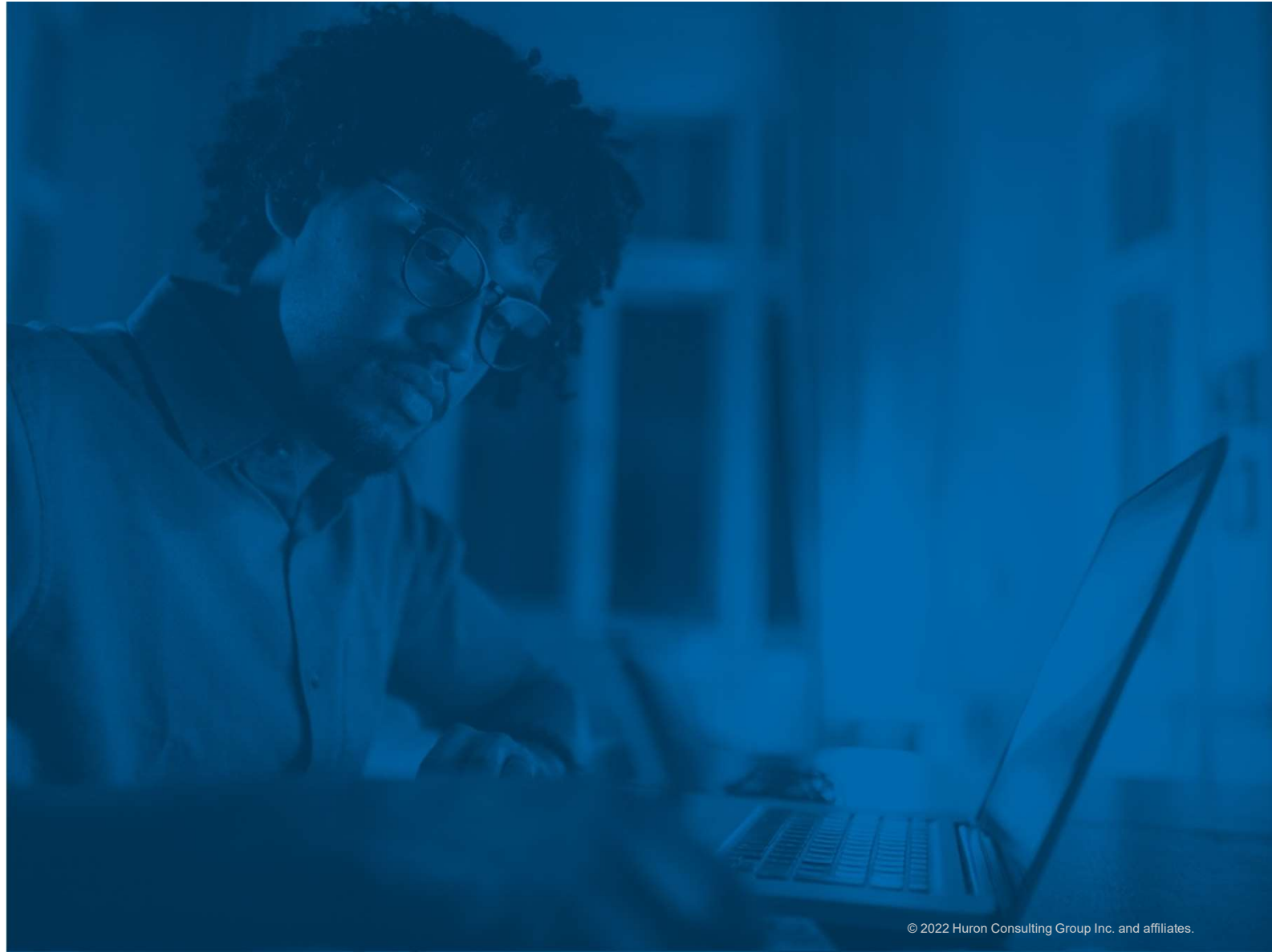
Roadmap to Systemwide Shared Services



These steps towards transformative shared services are **core enablers** of the opportunities outlined in subsequent slides, playing critical roles in USHE's ability to **successfully implement** the opportunity, the level of **efficiency gained**, and the potential for **cost reduction and risk mitigation**.

3

Security Operations Center

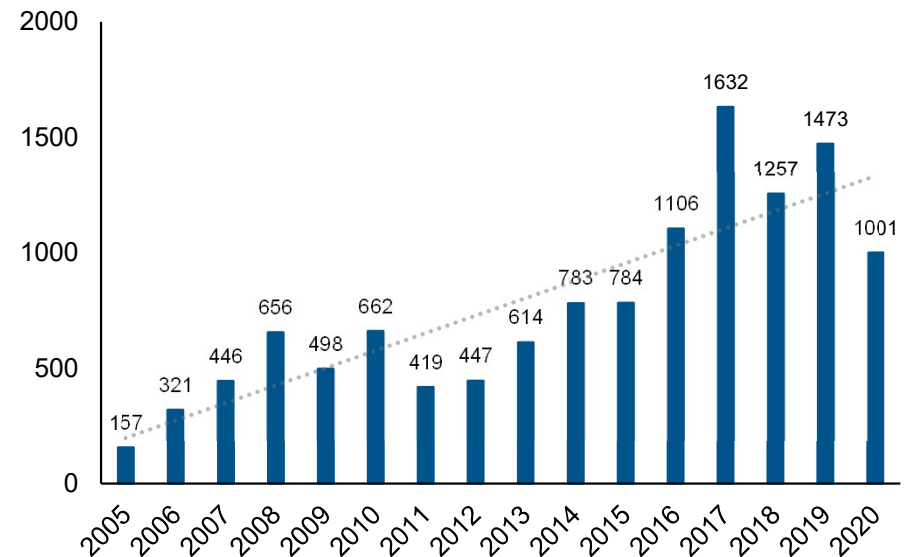


Overview of Opportunity

During interviews with IT stakeholders across the System, concern around cybersecurity was a strong theme. To address this concern, USHE can develop a systemwide Security Operations Center.

- Cybersecurity threats loom large in the minds of IT leadership across the entire System
- There are regulatory pressures to safeguard personally identifiable information (FERPA/HIPAA)
- Insurance companies are requiring greater security measures be in place in order to grant a policy
- Expertise in IT security is expensive while breaches can be even more expensive
- Vigilance necessitates a consistently high level of performance executing the fundamentals

U.S. Data Breaches per Year¹



Despite variances in the overall trend, data breaches in the U.S. are climbing. The threat across the System will be best mitigated with a coordinated effort lead by a Security Operations Center.

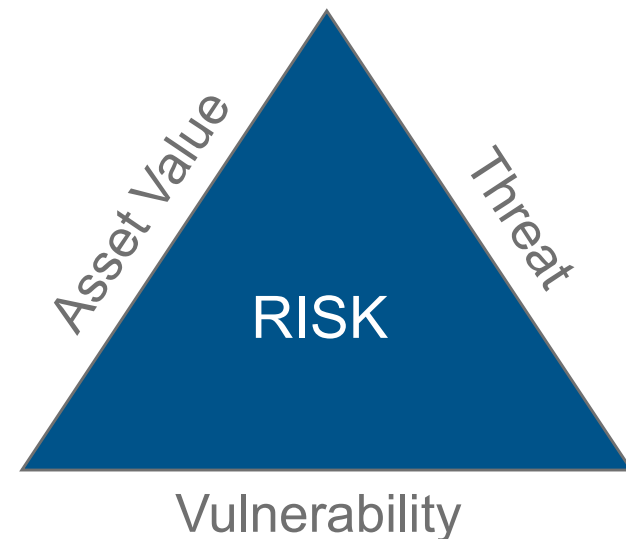
Source: ¹ Statista, 2022.

Risk Factors

Risk is a function of the value of the assets being protected, the level of the threat, and the vulnerability of the institution.² Of these three, the one that can be most directly targeted is vulnerability.

- A 2020 study by IBM indicated that the average total cost per breach specifically in the education sector was \$3.9M
- Attackers can fail countless times but only need to succeed once
- Having insurance does not release the insured from maintaining security controls¹ and may not cover breaches that result from social engineering schemes
- The threat environment has been growing and evolving, with no sign of slowing down or reversing

$$\text{Risk} = \text{Assets} \times \text{Threat} \times \text{Vulnerability}$$



The most direct way to manage the risk of a data breach is to minimize vulnerabilities.

Source: ¹ <https://www.gbainsurance.com/avoiding-cyber-claim-denials>

² EDUCAUSE "Effective Security Metrics: A Guide to Effective Security Metrics"

Exploring the Components of Risk

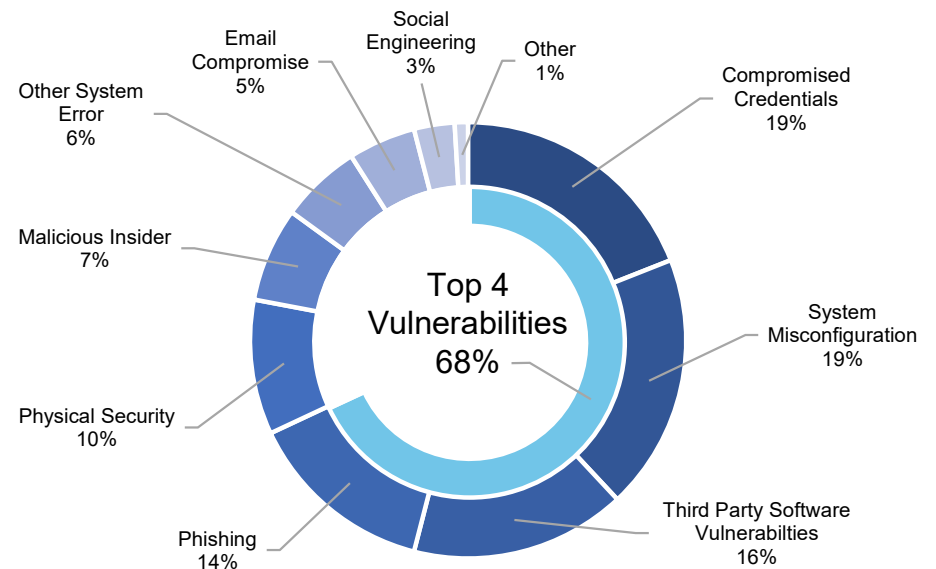
In order to quantify the amount of risk that can be mitigated, it is important to examine the stats that have been published with an eye to those specific to Higher Education when available.

Asset Value

- Adjusting for Higher Ed, the estimated cost of a data breach is \$96 per record¹
- There are tens of millions of records across USHE institutions²

Threat to Higher Ed¹

- Between 2005 – 2020 there were 995 breaches in Higher Ed (24.5M records):
 - 48% Malicious Attacks
 - 26% System Glitch
 - 26% Human Error



Addressing the top four vulnerabilities reduces that element of the risk equation by up to 68%.

Note: The IBM report states a number of \$160 but 40% of that number is attributed to lost revenue. As the higher ed revenue lifecycle is different, we have adjusted this estimate down.

Sources: ¹ Cost of a Data Breach, IBM, 2020 ² At least 35M records just at the 4-year schools, excluding UU.

Costs of Breaches

The costs associated with breaches can be categorized in four discrete types; detection and escalation, notification, post-breach response activities, and lost revenue.¹

Detection & Escalation	Notification	Post-Breach Response	Lost Revenue
<ul style="list-style-type: none">▪ Forensic investigations▪ Auditing▪ Assessment▪ Crisis management▪ Communications with leadership team▪ Development of a communication plan	<ul style="list-style-type: none">▪ Emails, letters, phone calls, and other means of giving notice▪ Meeting regulatory requirements▪ Communications with regulators▪ Engaging outside experts	<ul style="list-style-type: none">▪ Handling queries through a service desk▪ Credit monitoring and identity protection services▪ Legal expenditures▪ Regulatory follow-up▪ Remediation of exploited vulnerabilities	<ul style="list-style-type: none">▪ Business disruption▪ System downtime▪ Reputation loss▪ Diminished goodwill▪ Potential loss of students who choose to enroll elsewhere due to breach

The cost of a breach begins at the time of detection and can continue for a prolonged period depending on the impact of legal and regulatory requirements.

Source: ¹ "Cost of a Data Breach Report," IBM, 2021.

Example of Higher Education Breaches

The largest known breach in higher education occurred at a community college system in Arizona. This incident highlights the threat beyond R1 institutions.



MARICOPA
COMMUNITY COLLEGES

District Characteristics¹

- 10 Community Colleges
- 97,162 Enrolled Students (as of Fall 2020)
- Ratio of 32% Full-time/68% Part-time
- 59% Female, 40% Male
- 91% of Students live in Maricopa County

In April 2013, the Maricopa County Community College District experienced a data breach of approximately 2.5M records which included students, graduates, staff, and vendors spanning 30 years.

As of November 2014, the district board had approved over **\$26M in costs** to address the breach to include legal fees, notification and monitoring services, and consulting fees, while only \$867K had been paid out by insurance.²

Cybersecurity breaches are real threats that are actively impacting institutions across the higher education industry and can result in millions of unplanned expenses.

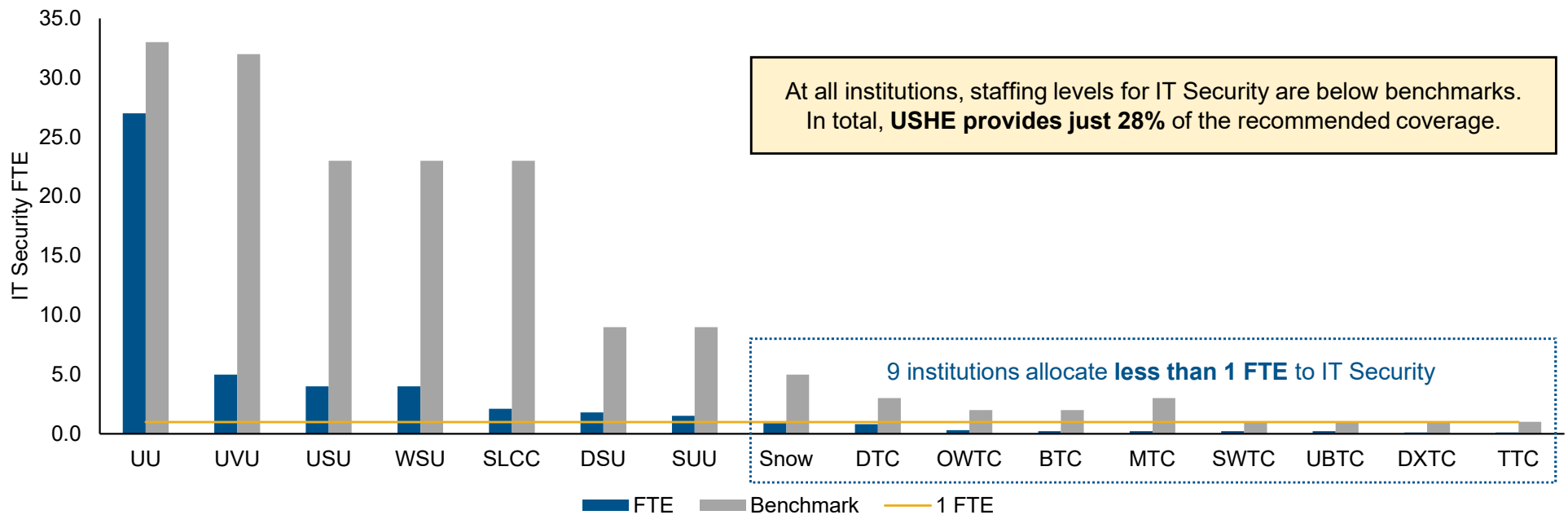
Sources: ¹ <https://www.maricopa.edu/about/institutional-data/dashboards/fast-facts>

² <https://www.azcentral.com/story/news/local/phoenix/2014/12/17/costs-repair-massive-mcccd-computer-hack-top-million/20539491/>

IT Security Staffing Analysis

Using a benchmark for the number of users per IT security staff member within the government and nonprofit sector, only UU has a staffing level that is close to that metric.

IT Security Staffing vs. Benchmark¹

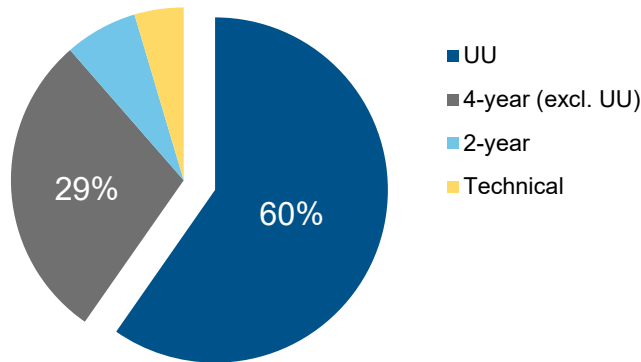


¹Source: IT Staffing Ratios, Computer Economics, 2019.

Current Information Security Cost Analysis

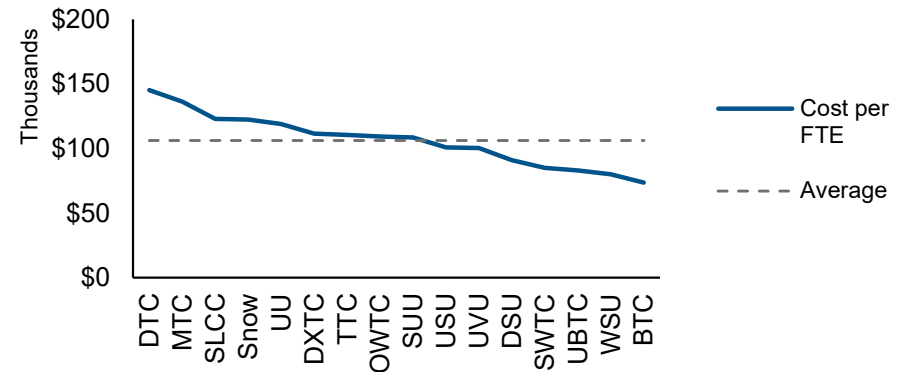
USHE's current information spend is heavily centered on four-year institutions, with cost per FTE ratios having a wide variance at the institutional level.

IT Security Spend Distribution



- The majority of the spending on Information Security labor occurs at UU (60%)
- The 4-year institutions together make up 89% of the spend on Information Security

IT Security Cost per FTE



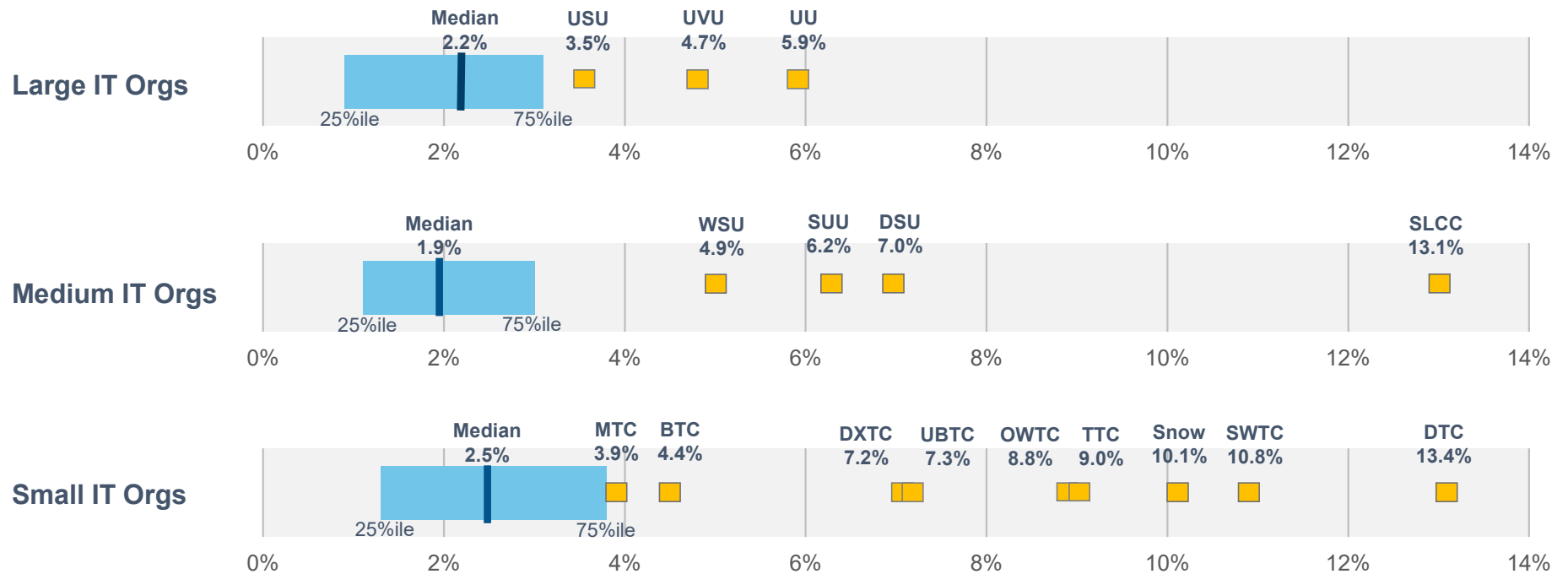
- The range of the per FTE cost for Information Security labor is between \$74K and \$136K¹
- The average is \$106K per FTE which helps explain why 56% of institutions commit < 1 FTE to security

Source: ¹ Huron Administrative Activity Study, 2021.

Note: FTEs were common-sized based on the reported activity from the USHE HAAS study.

IT Security as Percent of IT Budget

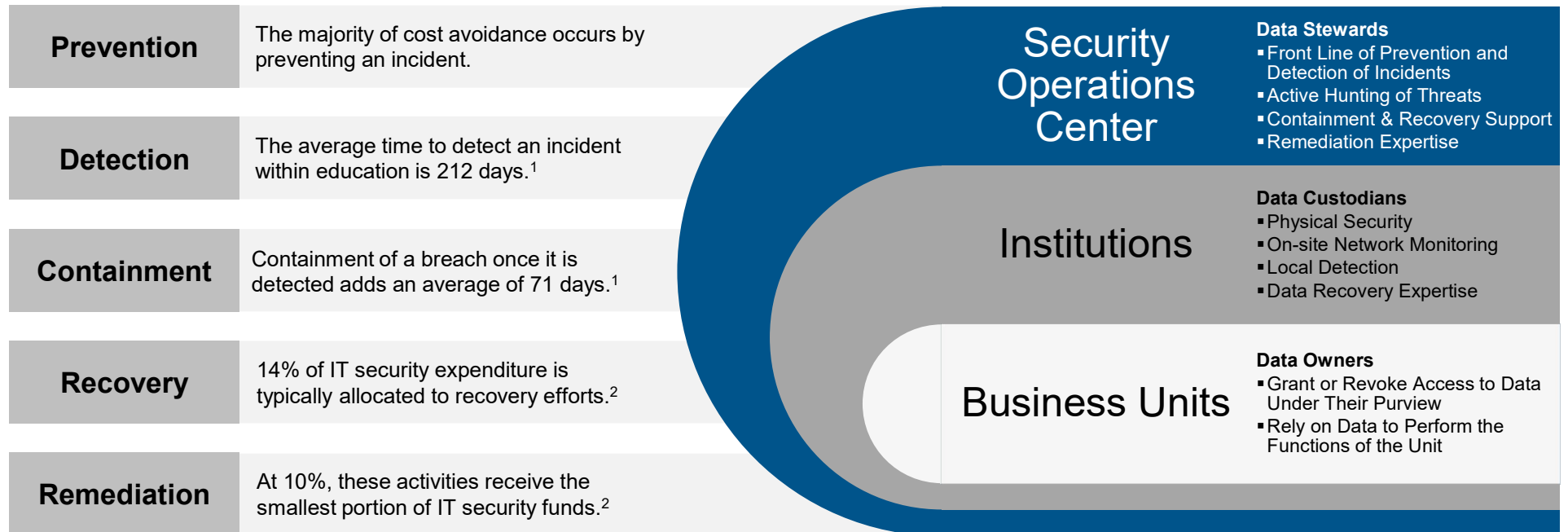
As IT budgets shrink, the percentage of that budget that goes to security appears disproportionate. This disparity across USHE institutions with similar-sized IT orgs suggests inconsistent prioritization.



Sources: USHE IT Security labor spending from Huron Administrative Activity Study, 2021.
Data for IT Org spending by org size from Computer Economics, 2020

A Layered Model of Security

A SOC serves as the first line of defense which eases the burden on the individual institutions. As the outermost layer, the most value the SOC provides is in stopping adverse events.




A Security Operations center provides a first line of defense and provides expertise on all five phases of the cybersecurity lifecycle: prevention, detection, containment, recovery, and remediation.

Sources: ¹ "Cost of a Data Breach Report", IBM Security, 2020.

² "The Economic Value of Prevention in the Cybersecurity Lifecycle," Ponemon Institute, 2020.

Example Security Operations Center

There are precedents for SOC's supporting state-wide university systems. For example, The Texas A&M University System operates a SOC that provides services to 10 institutions.

 <p>THE TEXAS A&M UNIVERSITY SYSTEM</p> <p>SOC Characteristics¹</p> <ul style="list-style-type: none">▪ Stops an estimated 1M attacks per month▪ Staff:<ul style="list-style-type: none">6 full-time Security Analysts2 System Administrators1 Business Admin10 Student Technicians1 Executive Director	<p>Security Operation Center Services²</p> <ul style="list-style-type: none">▪ Domain Name System Filtering▪ Threat Detection and Monitoring▪ Software Contracting and Evaluation▪ Vulnerability Scanning▪ Penetration Tests▪ Training & Awareness▪ Security Consulting
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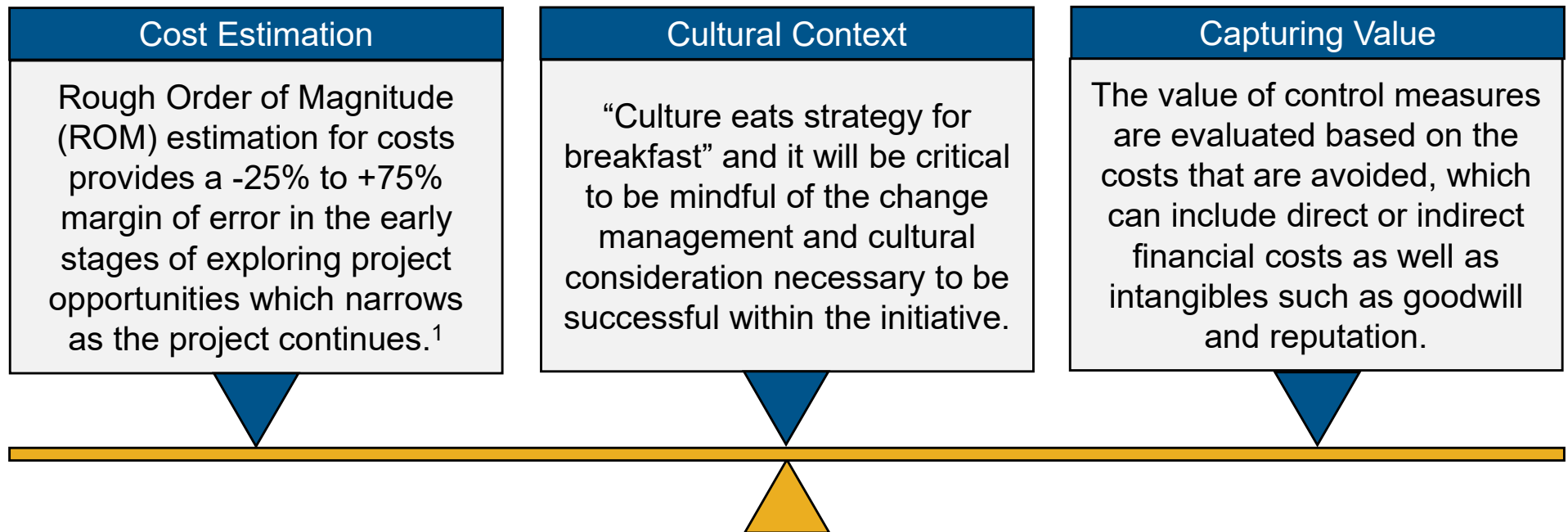
Texas A&M's SOC simplifies processes, standardizes on specific tools, and consolidates resources.

Sources: ¹<https://cybersecurity.tamu.edu/texas-am-university-system-touts-cybersecurity-efforts/>

² <https://it.tamus.edu/cybersecurity/soc/>

Key Factors in Scenario Development

Cost, culture, and benefit are key components in scenario development. However, each factor is inherently complex and the specific approach to an SOC will be driven by USHE decision-making.



Source: ¹ Project Management Institute, PMBOK, 7th Edition

Scenario 1: Extend Current Services

The first proposed scenario involves adding 5 staff in order to extend the current informal services to the technical colleges while maintaining the two-year cycle to visit each campus.

Summary

- Add 5 FTE decentralized Security Analysts, with home institutions based on need, who will broaden the pool of resources for traveling to campuses for security evaluations
- While this scenario is the closest to the baseline and represents the smallest degree of cultural change, the amount of risk that is mitigated is also the least
- This scenario represents ‘low hanging fruit’

Benefits

- Building on current successful shared services improves the chances of success
- Can be implemented as a first stage of a larger plan
- Anticipated reduction in vulnerability of between 5% and 15%

Limitations

- Staff that are added will likely be required to perform other IT functions in addition to security which will minimize their impact
- While impactful, this only represents an incremental improvement to the current state

Costs

Title	Qty	Salary	40% Fringe	Subtotal
Security Analyst	5	\$530,000	\$212,000	\$742,000
Annual Labor:				\$742,000

“Security is the #1 thing that keeps me up at night.”

Scenario 2: Address Security FTE Levels

This scenario allocates 1 FTE to the 9 institutions that currently have < 1 FTE of IT Security activity, as well as to SLCC which has the largest deficit in IT Security FTE relative to its number of users.

Summary

- Additional staff broaden the pool who can then add intervention implementation and security consulting services to current on-site testing
- Addresses gaps in IT security personnel as compared to the number of users served at the institution level
- Supports and educates on-site staff as well as providing temporary staffing for security projects for those institutions that choose to opt in

Benefits

- Increases security staff FTE to all institutions that are currently below 1 FTE for security activities
- Balances institutional cultures and System need
- Anticipated reduction in vulnerability is between 20% and 30%

Limitations

- Adds more responsibilities to staff who will still need to attend to their home institutions
- Risks sending mixed messages with respect to future IT security plans
- Lacks a true shared infrastructure

Costs

Title	Qty	Salary	40% Fringe	Subtotal
Security Analyst	10	\$1,060,000	\$424,000	\$1,484,000
Annual Labor:				\$1,484,000

“We cannot all afford to fund our own security people.”

Scenario 3: Build a Security Operations Center

This scenario calls for a transformative change in the approach to security across all USHE institutions in order to meet the persistent threat of the costs associated with breaches.

Summary

- The SOC is the first line of defense for the entire System and leads the effort to align around common defenses.
- Provides coordinated monitoring, incident response, and threat hunting coupled with user education and policy leadership.
- Hardware and software costs are highly variable, and a definitive estimate will depend on the implementation details.

“If a SOC is just logging and forwarding those logs, that’s not going to be helpful.”

Cost

Title	Qty	Salary	40% Fringe	Labor Subtotal
Security Analyst	4	\$90,000	\$36,000	\$504,000
Sr. Security Analyst	4	\$115,000	\$46,000	\$644,000
System Admin	3	\$80,000	\$32,000	\$336,000
Business Admin	1	\$65,000	\$26,000	\$91,000
Student Technician	12	\$15,000	-	\$180,000
Executive Director	1	\$150,000	\$60,000	\$210,000
Annual Labor:				\$1,965,000
Category				Cost Estimate
Labor				\$1,965,000
Hardware and Software Licenses				\$805,000*
Budgeted Annual Cost:				\$2,770,000

A scan of the industry found claims of \$1.4M in hardware and software costs associated with a SOC over a three-year period. By annualizing and adjusting by +75% to get the upper bound of the ROM estimate range, the cost is about \$805K per year.

Scenario 3: SOC Benefits and Limitations

The benefits and limitations of building a SOC represent the greatest possible gains through a shared service while recognizing that implementation will be more complex.

Benefits

- Allows for the most coordinated and aligned effort to be directed at cybersecurity across the System on top of the individual efforts occurring at each institution
- Alignment of security tools will provide equitable protection to institutions that may not have the resources to fund the costs associated with best-in-class cybersecurity tools
- Provide hands-on experience and internship opportunities for students to develop skills
- Anticipated reduction in vulnerability is between 40% and 60%

Limitations

- This scenario necessitates a high level of operational collaboration and data integration across the System, and will require navigation of culture, policy, and technology
- Lack of standard tools, such as endpoint protection, across the System will limit the efficiency of the SOC, as the personnel will be required to have expertise on all products
- As proposed, the Security Operations Center would not be a 24/7 operation. In order to have around the clock coverage, the minimal staffing required would be 12-14 people in security analyst roles

Calculating Cost Avoided

Cost avoided can be measured given the anticipated number of incidents per year, the average cost of an incident, the cost of the scenario, and an estimate of the reduction in vulnerability.¹

- The average total cost of a data breach in the education industry is \$3.90M²
- While there is often a high number of overall ‘attacks’, a very conservative estimate is to assume there to be at least 6 novel, credible ‘incidents’ per year at operations of USHE’s size
- As a System, USHE spends an average of \$106K per annualized FTE on security
- The average cost of a SOC is \$2.68M per year³
- Estimates in the reduction in vulnerability for each scenario should be conservative

Reduction in Risk

= *Anticipated incidents per year*

× *Cost per incident*

× *Reduction in vulnerability with scenario*

Risk Reduction ROI

=
$$\frac{(\text{Reduction in Risk} - \text{Cost of scenario})}{\text{Cost of scenario}}$$

Cost Avoided

= *Cost of scenario* × *Risk Reduction ROI*

Measuring the cost avoided by implementing differing security control measures is the best way to make a data-driven decision about which options meet the needs of the System.

Sources: ¹ <https://www.cisecurity.org/blog/the-one-equation-you-need-to-calculate-risk-reduction-roi/>

² “Cost of a Data Breach Report,” IBM, 2020.

³ “The Economics of Security Operations Centers: What is the True Cost for Effective Results?,” Ponemon Institute, 2020.

Comparing Scenarios

Assuming there are six novel, credible threats per year systemwide and that each one has the potential to cost \$3.9M, the potential cost avoided by the three scenarios presented is detailed below.

#	Scenario	Estimated Cost	Anticipated Reduction in Vulnerability	Reduction in Risk	Risk Reduction ROI	Potential Cost Avoided
1	Add 5 FTE	\$742,000	10%	\$2,340,000	215%	\$1,598,000
2	Add 10 FTE	\$1,484,000	25%	\$5,850,000	294%	\$4,366,000
3	Build a SOC	\$2,770,000	50%	\$11,700,000	322%	\$8,930,000
4	Scenarios 2+3	\$4,249,000	75%	\$17,550,000	313%	\$13,296,000

Adding FTEs without gaining the benefit of the shared operational efforts will limit the potential for avoiding costs and reduce the potential for risk mitigation.

Notes: Estimates provided are rough order of magnitude and can be -25% to +75%

Next Steps and Risk Management

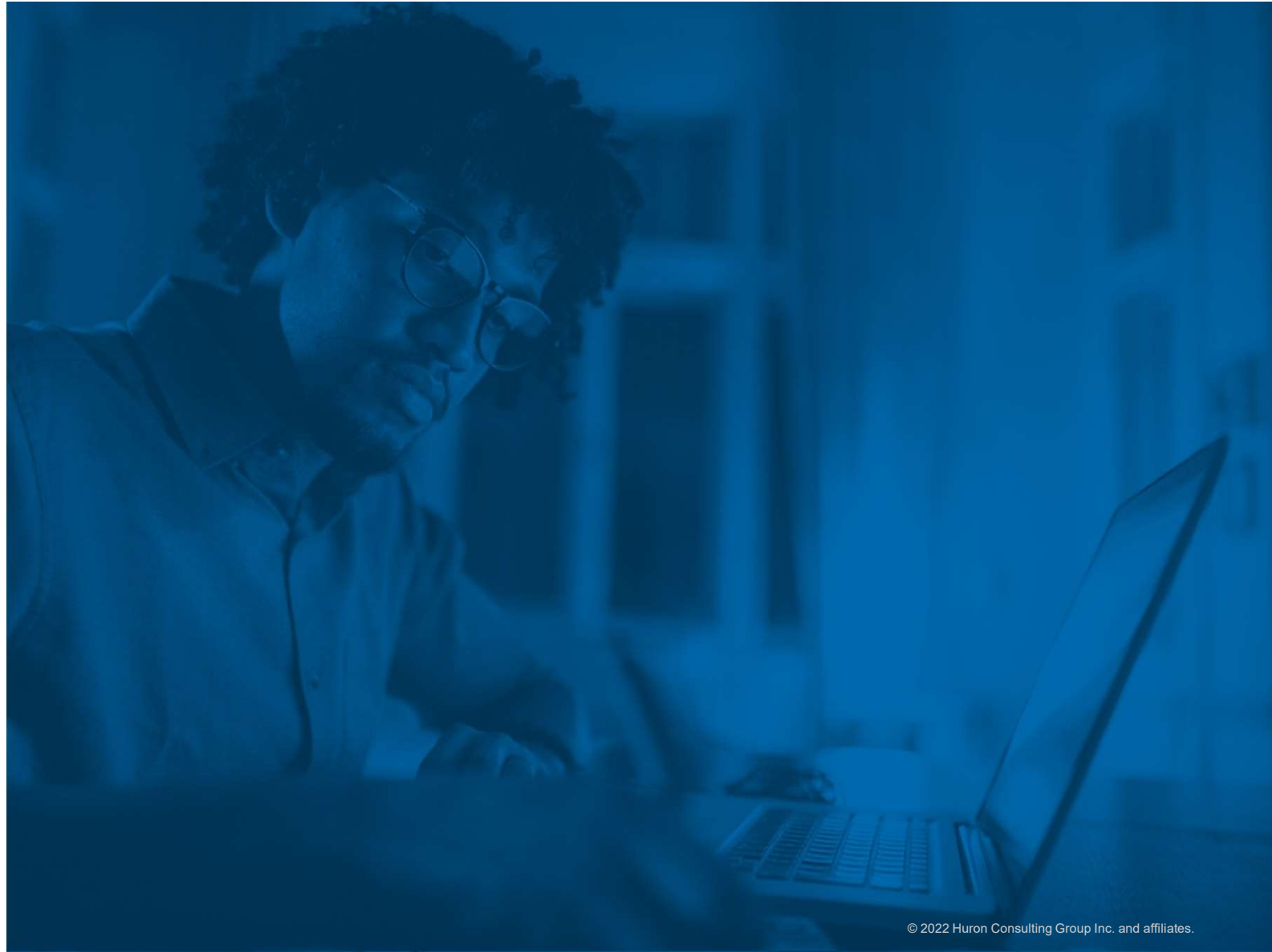
While next steps are highly dependent on specific approach, Huron has outlined the core activities and timelines that will be required to fully develop a USHE Security Operations Center.

Phase	PLANNING	DESIGN	IMPLEMENTATION
Timeline	Month 0 to 3	Month 4 to 12	Month 13 to 24
Key Activities	<p>Decide on the characteristics of the SOC, levels of service, and obtain buy-in from key stakeholders</p> <p>Conduct RFIs to help fill gaps in planning</p> <p>Plan the budgetary aspects and secure commitments for funding</p>	<p>Prepare the site for any on-premises offices</p> <p>Begin hiring SOC personnel</p> <p>Begin RFP processes and vendor selection for SOC-specific hardware, software, and services</p>	<p>Communicate regularly with stakeholders across all institutions</p> <p>Monitor progress and measure performance</p> <p>Begin ongoing cycle of feedback and improvement</p>
Key Risks	<p>Cultural Shift: The SOC will be operating in an ecosystem of highly diverse institutions with respect to how priorities are operationalized. Success will require varying degrees of cultural shifts to prioritize security systemwide.</p> <p>Capturing Success: Since success will be measured by the absence of adverse events, justifying the ongoing expense will require diligence.</p> <p>Adequate Resourcing: Clearly defined roles and responsibilities, with sufficient resource allocation will be key to a successful implementation.¹</p>		

Note: Burnout and high turnover rates were reported as key risks for under-resourced SOC. See "Second Annual Study of Security Operations Centers: What is the True Cost for Effective Results?" Ponemon Institute, 2020.

4

Procurement Operating Models



Overview of Opportunity

Procurement's value-proposition can be enhanced by focusing on increased collaboration, improved data visibility, leveraging System-wide spend, and reducing redundant workload between institutions.

Executive Summary

- **Rationale:** A revised operating model would lead to an improvement in managed spend across institutions. This would increase procurement collaboration, leading to cost savings, improved service for end users, enhanced data visibility and quality, and reduction of redundant work.
- **Peer Practice:** The University of Colorado System implemented a center-led procurement operating model that has one CPO and service center for all the schools in the System, which is responsible for setting strategies, providing tools and contracts, managing transactions, enforcing policy, etc.
- **Prerequisites:** Currently, institutions have varying procurement systems. Moving to a common procurement system would need to occur before implementing a new operating model, depending on which model is selected.

Operating Model Options



EVENT FOCUS

USHE system office helps identify collaboration opportunities and planning for consolidated sourcing events.

Institutions have the structure to collaborate on sourcing events as needed.



CATEGORY LEADERSHIP

USHE office provides category management services for institutions in high spend areas. Institutions manage all other categories.

Flexible approach with centrally managed strategy and autonomy for institutions to manage the non-center led spend categories and all transactional activities.





































































CONSOLIDATED

Centralized function aggregates all procurement activities into a single USHE managed service center.

USHE service center is responsible for managing all purchasing and contracting activities.

Procurement Operating Model Scenarios

	Description	Resource Efficiency	Process Efficiency	Tech Efficiency	Service Increase	Spend Savings	Change Mgmt.	Implementation Cost	Tech Cost	FTE Cost	Overall Impact
 SCENARIO 1	USHE-wide sourcing/contracting collaboration on select categories, with potential for some shared enabling technologies. Institutions manage all other procurement categories and activities.										
 SCENARIO 2	USHE office responsible for category strategies, managing contracts and sourcing for select high spend categories. Institutions manage all other categories and all transactions.										
 SCENARIO 3	Leverage existing university procurement teams by designating different institutions to manage various categories across USHE. Institutions manage all other categories and all transactions.										
 SCENARIO 4	USHE service center has full ownership and direct oversight of all contracting and purchasing activities, providing technologies, enforcing policy, etc.										
 SCENARIO 5	USHE office has full ownership and direct oversight of all contracting and purchasing activities, except University of Utah and Utah State; UofU and USU would still collaborate with the System office.										
 SCENARIO 6	Group procurement operations into a few service centers based on commonality among institutions (large university vs smaller technical colleges) or based on region.										

Note: Red Harvey Ball represents reduced cost

Scenario 1: Event Focus Collaboration



SCENARIO 1

Overview

Bottom Line:

Choose this model if you want collaboration for individual sourcing events and low impact to existing procurement practices.

Description:

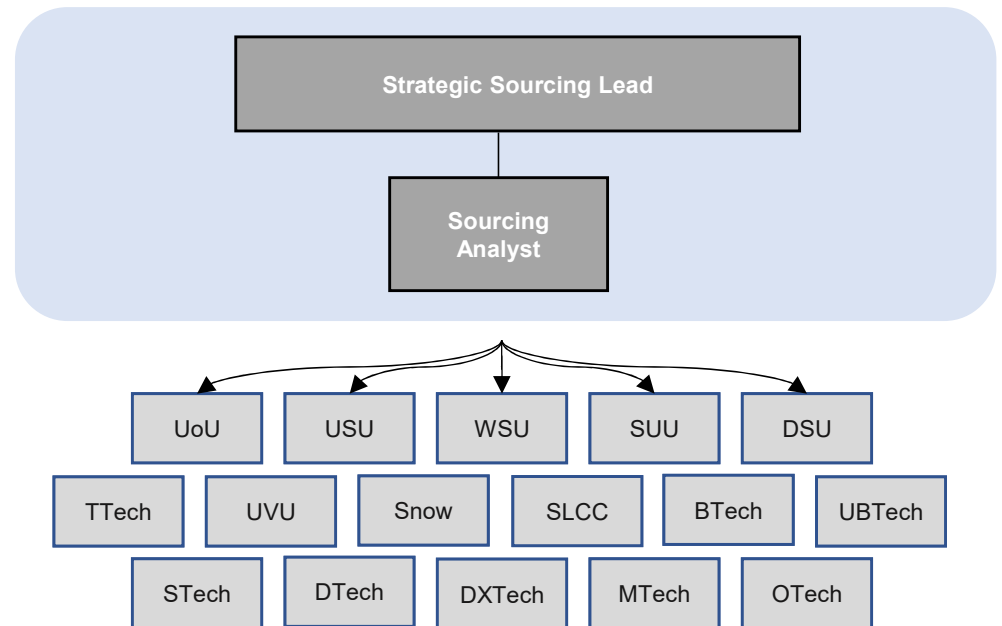
USHE to establish procurement support, facilitating collaboration on select sourcing events identified by the support team on behalf of the participating institutions.

As this is a sourcing event-based model only, all other procurement activities including requisitions and purchase order transactions would remain at the institutions. Additionally, the institutions would continue to manage all other procurement categories.

Higher Education Example:

The IUC Purchasing Group of Ohio (IUC-PG) is a purchasing consortium that supports the state institutions of higher education. The IUC-PG coordinates shared sourcing events and creates purchasing agreements for use by its 87 members (the 14 state universities, 15 community colleges, 8 technical colleges and 51 independent educational institutions).

USHE Illustrative Model



Scenario 1: Event Focus Collaboration



Operating Model Considerations																																																																	
	Considerations	Impact	Comments																																																														
Resource	FTE efficiency opportunity	🕒	<ul style="list-style-type: none"> Institutions will have centralized support on select sourcing events. 																																																														
Process	Standardized procurement processes	🕒	<ul style="list-style-type: none"> Standardized sourcing and contracts approach for all select sourcing events, reducing duplicated efforts across institutions and more fully leveraging spend on these categories. 																																																														
Technology	Standardized procurement tools	🕒	<ul style="list-style-type: none"> No standardized tools (could share sourcing/contract management tools) 																																																														
	Spend reporting	🕒	<ul style="list-style-type: none"> No additional reporting capabilities 																																																														
Service	Improved service to campus	🕒	<ul style="list-style-type: none"> Approval and purchasing process enhanced using negotiated agreements. 																																																														
	Needs of each campus tailored	🕒	<ul style="list-style-type: none"> Institutions would provide input on requirements for select sourcing events. 																																																														
Spend Savings	Sourcing savings opportunities	🕒	<ul style="list-style-type: none"> Only for select sourcing events, estimated \$1M - \$2M in savings. 																																																														
	Collaboration	🕒	<ul style="list-style-type: none"> Participation from institutions on select sourcing events. 																																																														
Change Management	Communicate and implement change	🕒	<ul style="list-style-type: none"> Low effort as this is a minor shift from current practices. 																																																														
Implementation Cost and Timeline	JAGGAER license cost	🕒	<ul style="list-style-type: none"> Not applicable 																																																														
	Implementation cost	🕒	<ul style="list-style-type: none"> Not applicable 																																																														
	FTE cost impact	🕒	<ul style="list-style-type: none"> Two additional FTE resources are estimated including a Strategic Sourcing Lead and a Data Analyst to facilitate USHE-wide sourcing events. 																																																														
	Implementation timeline	🕒	<table border="1"> <thead> <tr> <th rowspan="2">KEY ACTIVITIES</th> <th colspan="2">FY22</th> <th colspan="4">FY23</th> <th>FY24</th> </tr> <tr> <th>Q3</th> <th>Q4</th> <th>Q1</th> <th>Q2</th> <th>Q3</th> <th>Q4</th> <th>Q1</th> </tr> </thead> <tbody> <tr> <td>Finalize model</td> <td colspan="2">█</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Identify resources</td> <td></td> <td>█</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Develop operating procedures</td> <td></td> <td></td> <td colspan="2">█</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Implement enabling technology (N/A)</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Training</td> <td></td> <td></td> <td colspan="2">█</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Deployment</td> <td></td> <td></td> <td></td> <td colspan="2">█</td> <td></td> <td></td> </tr> </tbody> </table>	KEY ACTIVITIES	FY22		FY23				FY24	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Finalize model	█							Identify resources		█						Develop operating procedures			█					Implement enabling technology (N/A)								Training			█					Deployment				█		
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Scenario 2: Centralized Support for Key Categories



SCENARIO 2

Overview

Bottom Line:

Choose this model if you want collaboration and more proactive category strategies and expertise on designated spend categories, driving increased savings opportunities across the institutions.

Description:

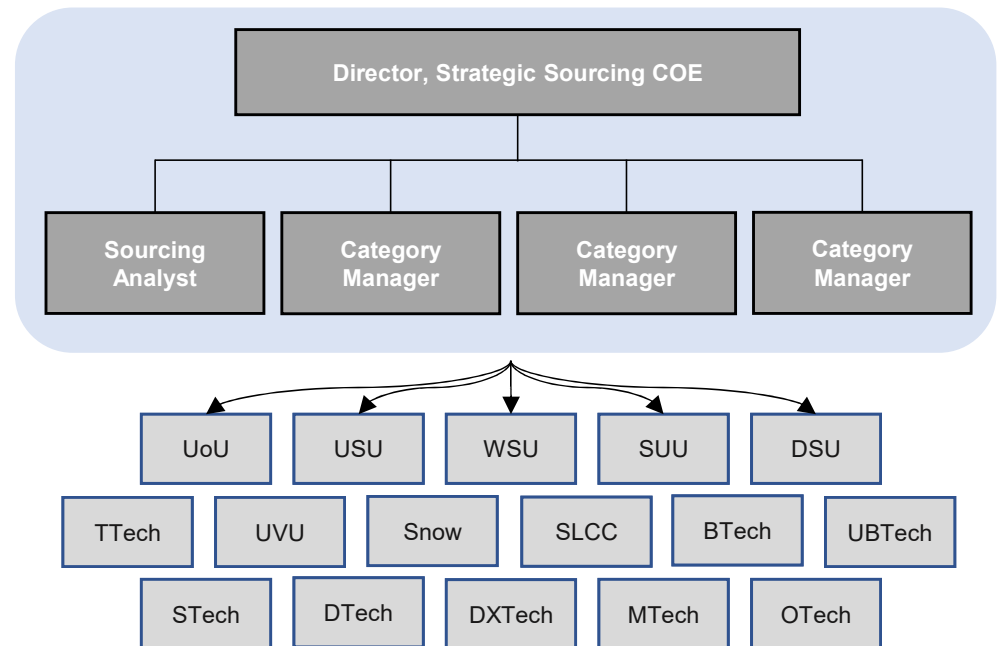
USHE to establish a procurement center of excellence for the system. The procurement COE would work across the system to establish systemwide category strategies and agreements for goods and services that are commonly purchased across the System institutions.

The establishment of category strategies and contracts are in scope for select categories, but all other categories and procurement activities and transactions would remain at the institutions.

Higher Education Example:

The University of California (UC) System Procurement uses strategic and collaborative sourcing methods to optimize spend on key categories across the UC system, creating significant savings for the University. UC Procurement partners with campus procurement teams to leverage spend across the selected categories.

USHE Illustrative Model



Scenario 2: Centralized Support for Key Categories



		Operating Model Considerations																																																																			
		Considerations	Impact	Comments																																																																	
Resource	FTE efficiency opportunity		🕒	<ul style="list-style-type: none"> Additional resources responsible for centralized spend categories. Existing university resources would remain the same, but leverage system category expertise. 																																																																	
	Process	Standardized procurement processes		🕒	<ul style="list-style-type: none"> Standardized sourcing and contracts approach for select spend categories. Reduced duplication of efforts. 																																																																
Technology	Standardized procurement tools		🕒	<ul style="list-style-type: none"> Common system using JAGGAER for Sourcing and Contracts for all institutions, increased automation and collaboration. 																																																																	
	Spend reporting		🕒	<ul style="list-style-type: none"> Increased spend visibility for institutions across select categories. 																																																																	
Service	Improved service to campus		🕒	<ul style="list-style-type: none"> Approval and purchasing process enhanced using negotiated agreements. 																																																																	
	Needs of each campus tailored		🕒	<ul style="list-style-type: none"> Institutions provide input on needs for centralized categories and maintain independence on all other categories. 																																																																	
Spend Savings	Sourcing savings opportunities		🕒	<ul style="list-style-type: none"> Enhanced purchasing power and proactive category strategies within select categories, estimated \$3M - \$7M in sourcing savings. 																																																																	
	Collaboration		🕒	<ul style="list-style-type: none"> Drives participation on select spend categories among all institutions. 																																																																	
Change Management	Communicate and implement change		🕒	<ul style="list-style-type: none"> Moderate effort as this is a shift from current practices at the spend category level. 																																																																	
Implementation Cost and Timeline	JAGGAER license cost		🕒	<ul style="list-style-type: none"> \$175K - \$225K estimated annual system costs for Sourcing and Contracts based on a 5-year term. Existing customers to extend their contracts accordingly. 																																																																	
	Implementation cost		🕒	<ul style="list-style-type: none"> Cost range to be determined, includes technology and model implementation efforts. 																																																																	
	FTE cost impact		🕒	<ul style="list-style-type: none"> The COE is estimated to include five (5) resources, three (3) of which would be responsible for category strategy and RFP execution. 																																																																	
	Implementation timeline		🕒	<table border="1"> <thead> <tr> <th rowspan="2">KEY ACTIVITIES</th> <th colspan="2">FY22</th> <th colspan="4">FY23</th> <th>FY24</th> </tr> <tr> <th>Q3</th> <th>Q4</th> <th>Q1</th> <th>Q2</th> <th>Q3</th> <th>Q4</th> <th>Q1</th> </tr> </thead> <tbody> <tr> <td>Finalize model</td> <td colspan="2">█</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Identify resources</td> <td></td> <td colspan="2">█</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Develop operating procedures</td> <td></td> <td></td> <td colspan="2">█</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Implement enabling technology</td> <td></td> <td></td> <td colspan="3">█</td> <td></td> <td></td> </tr> <tr> <td>Training</td> <td></td> <td></td> <td></td> <td></td> <td colspan="2">█</td> <td></td> </tr> <tr> <td>Deployment</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td colspan="2">█</td> </tr> </tbody> </table>				KEY ACTIVITIES	FY22		FY23				FY24	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Finalize model	█							Identify resources		█						Develop operating procedures			█					Implement enabling technology			█					Training					█			Deployment						█
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Scenario 3: Institution Support for Key Categories



SCENARIO 3

Overview

Bottom Line:

Choose this model if you want collaboration and more proactive category strategies and expertise on designated spend categories, but do not want to put in place a separate centralized infrastructure.

Description:

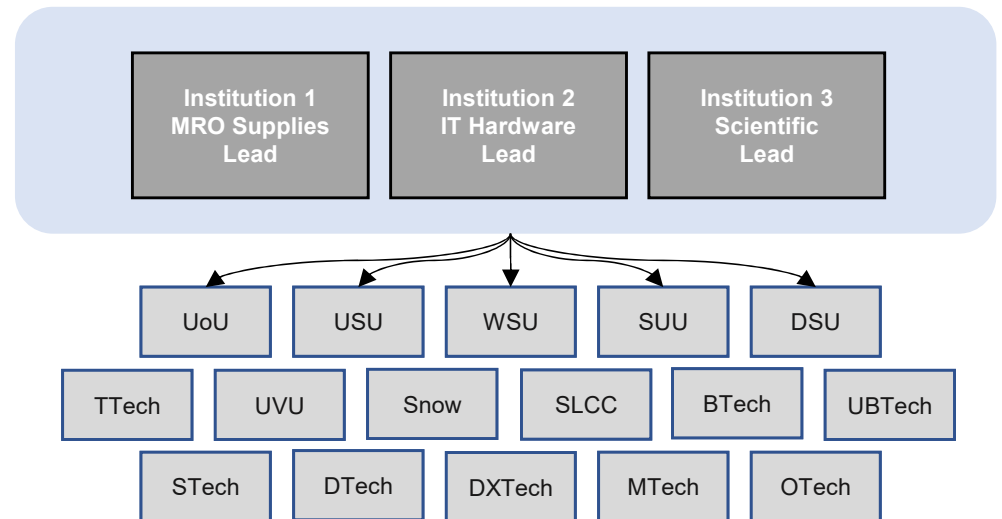
Similar to Scenario 2, this model focuses on leveraging system-wide spend within select categories. However, different institutions within USHE would be tasked with managing these category strategies and sourcing/contracting initiatives on behalf of the System from a sourcing and contracting perspective.

The establishment of category strategies and contracts are in scope for select categories, but all other categories and procurement activities and transactions would remain at the institutions.

Higher Education Example:

This is an alternative option which is a variation of Scenario 2.

USHE Illustrative Model



Scenario 3: Institution Support for Key Categories



Operating Model Considerations																																																																					
	Considerations	Impact	Comments																																																																		
Resource	FTE efficiency opportunity	🕒	<ul style="list-style-type: none"> Leverages existing spend category expertise across all other institutions. 																																																																		
Process	Standardized procurement processes	🕒	<ul style="list-style-type: none"> Standardized sourcing and contracts approach for select spend categories. No duplicated efforts would occur within the select categories. 																																																																		
Technology	Standardized procurement tools	🕒	<ul style="list-style-type: none"> Common system using JAGGAER for Sourcing and Contracts for all institutions, increased automation and collaboration. 																																																																		
	Spend reporting	🕒	<ul style="list-style-type: none"> Increased spend visibility for institutions across select categories. 																																																																		
Service	Improved service to campus	🕒	<ul style="list-style-type: none"> Approval and purchasing process enhanced using negotiated agreements. 																																																																		
	Needs of each campus tailored	🕒	<ul style="list-style-type: none"> Institutions provide input on needs for categories led by other institutions, but concerns may exist that their needs take a back seat to the lead institutions.. 																																																																		
Spend Savings	Sourcing savings opportunities	🕒	<ul style="list-style-type: none"> Enhanced purchasing power and proactive category strategies within select categories, estimated \$3M - \$7M in sourcing savings. 																																																																		
	Collaboration	🕒	<ul style="list-style-type: none"> Participation from institutions on designated spend categories. 																																																																		
Change Management	Communicate and implement change	🕒	<ul style="list-style-type: none"> Moderate effort as this is a shift from current practices at the category level. 																																																																		
Implementation Cost and Timeline	JAGGAER license cost	🕒	<ul style="list-style-type: none"> \$175K - \$225K estimated annual system costs for Sourcing and Contracts based on a 5-year term. Existing customers to extend their contracts accordingly. 																																																																		
	Implementation cost	🕒	<ul style="list-style-type: none"> Cost range to be determined, includes technology and model implementation efforts. 																																																																		
	FTE cost impact	🕒	<ul style="list-style-type: none"> Likely need to provide additional FTE to support larger spend, requirements gathering and facilitation across all institutions in select categories, and potential backfill of other roles. 																																																																		
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Scenario 4: Complete Consolidation



SCENARIO 4

Overview

Bottom Line:

Choose this model if you want a fully consolidated procurement organization serving all institutions, maximizing opportunities for savings, service, and risk reduction.

Description:

Strategic Sourcing: Responsible for managing supplier relationships, category optimization/strategy, and supporting departmental needs for all institutions. Utilizes data to find opportunities for enterprise-wide agreements.

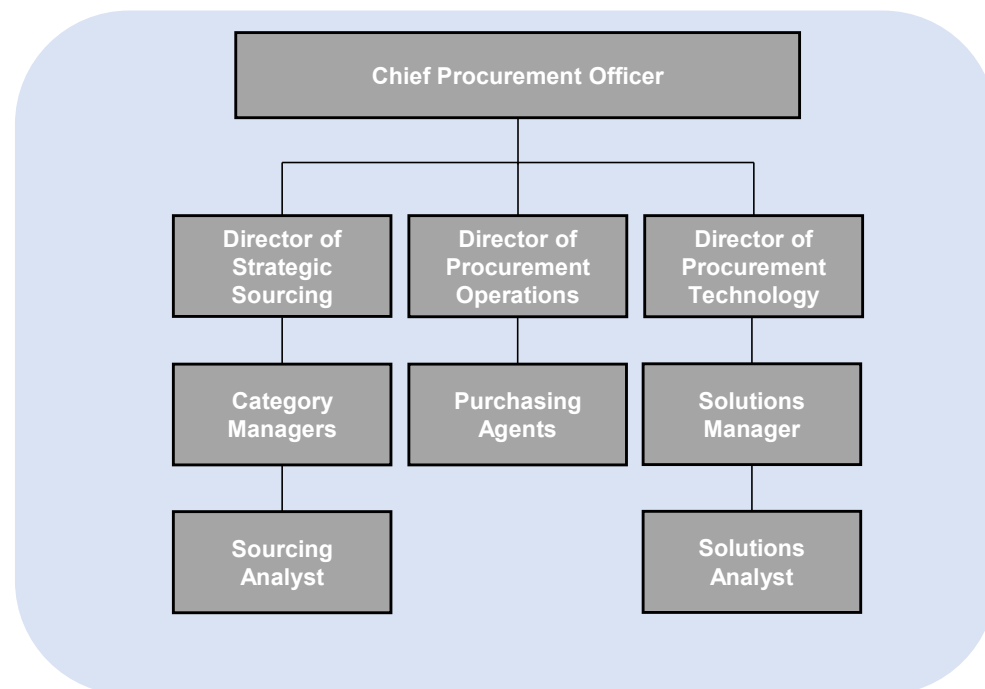
Procurement Operations: Provides customer service and support to departments and suppliers, supports purchases for all categories.

Procurement Technology: Support ongoing administration of procurement technology platforms, lead and support projects designed to implement changes or add functionality to the procurement technology platforms and support ongoing training efforts.

Higher Education Example:

The University of Colorado System Procurement Service Center (PSC) provides services related to spend management, contracting, procure-to-pay, and travel management activities.

USHE Illustrative Model



Scenario 4: Complete Consolidation



		Operating Model Considerations																																																																				
		Considerations	Impact	Comments																																																																		
Resource	FTE efficiency opportunity		●	<ul style="list-style-type: none"> Centralized resources responsible for entire consolidation of system spend providing labor efficiencies through standardization efforts. 																																																																		
	Process	Standardized procurement processes		●	<ul style="list-style-type: none"> Standardized sourcing and contracts approach for all spend categories. No duplicated efforts would occur through consistent standards and controls. 																																																																	
Technology	Standardized procurement tools		●	<ul style="list-style-type: none"> All institutions to use JAGGAER onto a shared instance (leveraging Multi-Business Unit functionality). 																																																																		
	Spend reporting		●	<ul style="list-style-type: none"> Increased spend visibility across the system. 																																																																		
Service	Improved service to campus		◐	<ul style="list-style-type: none"> Approval and purchasing process enhanced using negotiated agreements and enhanced technology solution and provides greater category expertise. 																																																																		
	Needs of each campus tailored		◐	<ul style="list-style-type: none"> Individual institutions would have less independence, but service center would focus on understanding and supporting their needs. 																																																																		
Spend Savings	Sourcing savings opportunities		●	<ul style="list-style-type: none"> Maximizes purchasing power, estimated \$6M - \$12M in sourcing savings. 																																																																		
	Collaboration		●	<ul style="list-style-type: none"> Participation from all institutions on spend categories and procurement operations. 																																																																		
Change Management	Communicate and implement change		●	<ul style="list-style-type: none"> Large effort as this is a major shift from current practices. 																																																																		
Implementation Cost and Timeline	JAGGAER license cost		●	<ul style="list-style-type: none"> \$850K - \$900K additional annual cost to existing license fees for all institutions to join a shared instance. Based on a 5-year term, requiring existing customers to extend their contracts. 																																																																		
	Implementation cost		●	<ul style="list-style-type: none"> Cost range to be determined, includes technology and model implementation efforts. 																																																																		
	FTE cost impact		●	<ul style="list-style-type: none"> Estimated 30-60% total reduction of procurement resources through efficiencies gained as the model matures. 																																																																		
	Implementation timeline		●	<table border="1"> <thead> <tr> <th rowspan="2">KEY ACTIVITIES</th> <th colspan="2">FY22</th> <th colspan="4">FY23</th> <th>FY24</th> </tr> <tr> <th>Q3</th> <th>Q4</th> <th>Q1</th> <th>Q2</th> <th>Q3</th> <th>Q4</th> <th>Q1</th> </tr> </thead> <tbody> <tr> <td>Finalize model</td> <td colspan="2">██████████</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Identify resources</td> <td></td> <td colspan="2">██████████</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Develop operating procedures</td> <td></td> <td></td> <td colspan="2">██████████</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Implement enabling technology/model</td> <td></td> <td></td> <td></td> <td colspan="3">██████████</td> <td></td> </tr> <tr> <td>Training</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td colspan="2">██████████</td> </tr> <tr> <td>Deployment</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>██████████</td> </tr> </tbody> </table>					KEY ACTIVITIES	FY22		FY23				FY24	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Finalize model	██████████							Identify resources		██████████						Develop operating procedures			██████████					Implement enabling technology/model				██████████				Training						██████████		Deployment						
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Scenario 5: Consolidate with UofU / USU Participation



SCENARIO 5

Overview

Bottom Line:

Choose this model if you want a fully consolidated organization, maximizing opportunities for cost savings and consistency within policies and procedures while allowing for larger institutions, such as University of Utah and Utah State to maintain their internal procurement teams due to their size and needs.

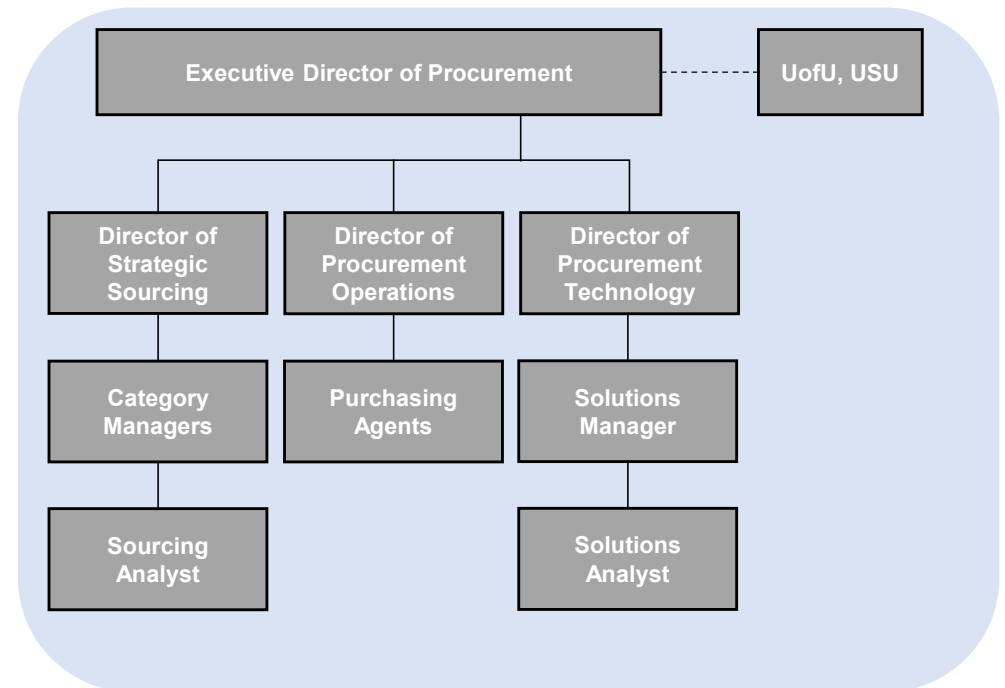
Description:

Service center to support all sourcing, contracting, and procurement activities for all other institutions. Provides and support technology solution, system-wide contracts, training, expert purchasing knowledge across all categories, provides and enforces policies, etc. UofU and USU would maintain its own buying functions but would collaborate closely with the procurement service center.

Higher Education Example:

The University of Wisconsin System office of procurement provides systemwide procurement leadership, guidance, and advocacy. It offers authority on procurement policies and practices for the entire UW System, maximizes procurement resources through collaboration across the UW System and identifies enterprise-wide cost saving and strategic contracting opportunities. UW-Madison and UW-Milwaukee maintain their own purchasing organizations but collaborate with UW System procurement.

USHE Illustrative Model



Scenario 5: Consolidate with UofU / USU Participation



		Operating Model Considerations																																																																				
		Considerations	Impact	Comments																																																																		
Resource	FTE efficiency opportunity		🕒	<ul style="list-style-type: none"> Centralized resources responsible for consolidated system spend, excluding UofU and USU, providing labor efficiencies through standardization efforts. 																																																																		
	Process	Standardized procurement processes		🕒	<ul style="list-style-type: none"> Standardized sourcing and contracts approach for all spend categories. Limited duplication efforts would occur through separate control of UofU and USU processes. 																																																																	
Technology	Standardized procurement tools		🕒	<ul style="list-style-type: none"> All institutions to use JAGGAER onto a shared instance (leveraging Multi-Business Unit functionality). 																																																																		
	Spend reporting		🕒	<ul style="list-style-type: none"> Increased spend visibility across the system. 																																																																		
Service	Improved service to campus		🕒	<ul style="list-style-type: none"> Approval and purchasing process enhanced using negotiated agreements and enhanced technology solution and provides greater category expertise. 																																																																		
	Needs of each campus tailored		🕒	<ul style="list-style-type: none"> Large institutions, such as UofU and USU would maintain a level of independence, although participation in system-wide sourcing efforts is highly encouraged. 																																																																		
Spend Savings	Sourcing savings opportunities		🕒	<ul style="list-style-type: none"> Enhances system purchasing power, estimated \$5M - \$10M in sourcing savings. 																																																																		
	Collaboration		🕒	<ul style="list-style-type: none"> Participation from institutions on spend categories, including UofU and USU. 																																																																		
Change Management	Communicate and implement change		🕒	<ul style="list-style-type: none"> Large effort as this is a major shift from current practices for most institutions. Uof U and USU would be a moderate impact as they would maintain their own procurement resources. 																																																																		
Implementation Cost and Timeline	JAGGAER license cost		🕒	<ul style="list-style-type: none"> \$850K - \$900K additional annual cost to existing license fees for all institutions to join a shared instance. Based on a 5-year term, requiring existing customers to extend their contracts. 																																																																		
	Implementation cost		🕒	<ul style="list-style-type: none"> Cost range to be determined, includes technology and model implementation efforts. 																																																																		
	FTE cost impact		🔴	<ul style="list-style-type: none"> Estimated 20-40% total reduction of procurement resources through efficiencies gained as the model matures. Reduced opportunity from UofU / USU maintaining separate resources. 																																																																		
	Implementation timeline		🕒	<table border="1"> <thead> <tr> <th rowspan="2">KEY ACTIVITIES</th> <th colspan="2">FY22</th> <th colspan="4">FY23</th> <th>FY24</th> </tr> <tr> <th>Q3</th> <th>Q4</th> <th>Q1</th> <th>Q2</th> <th>Q3</th> <th>Q4</th> <th>Q1</th> </tr> </thead> <tbody> <tr> <td>Finalize model</td> <td colspan="2">██████████</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Identify resources</td> <td></td> <td>██████████</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Develop operating procedures</td> <td></td> <td></td> <td>██████████</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Implement enabling technology/model</td> <td></td> <td></td> <td></td> <td>██████████</td> <td>██████████</td> <td></td> <td></td> </tr> <tr> <td>Training</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>██████████</td> <td></td> </tr> <tr> <td>Deployment</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>██████████</td> </tr> </tbody> </table>					KEY ACTIVITIES	FY22		FY23				FY24	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Finalize model	██████████							Identify resources		██████████						Develop operating procedures			██████████					Implement enabling technology/model				██████████	██████████			Training						██████████		Deployment						
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Scenario 6: Consolidate Based on Institution Commonality



SCENARIO 6

Overview

Bottom Line:

Choose this model if you want to consolidate based on commonality among the institutions or based on regions. This allows for collaboration to be tailored to needs of institutions by type while generating savings and gaining process efficiencies.

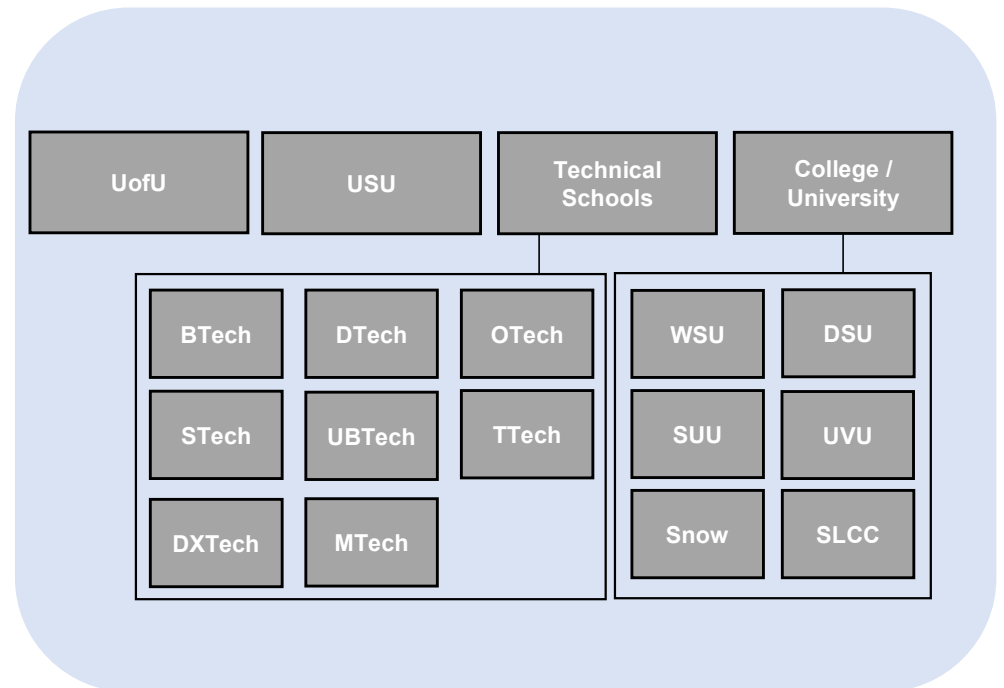
Description:

Establish shared service centers based on institutional grouping, offering collaboration on sourcing, policies and procedures, and contracting within the assigned groups. UofU and USU would maintain their own procurement teams while working jointly with the other schools.

Higher Education Example:

This is an alternate approach to the fully consolidated model.

USHE Illustrative Model









Scenario 6: Consolidate Based on Commonality



Operating Model Considerations																																																																	
Considerations	Impact	Comments																																																															
Resource	FTE efficiency opportunity	●	<ul style="list-style-type: none"> Multiple centralized teams responsible for consolidated system spend, based on institution commonality, providing labor efficiencies through standardization efforts. 																																																														
Process	Standardized procurement processes	●	<ul style="list-style-type: none"> Standardized sourcing and contracts approach for all spend categories. Limited duplication efforts would occur through separate centralized teams and processes. 																																																														
Technology	Standardized procurement tools	●	<ul style="list-style-type: none"> All institutions to use JAGGAER onto a shared instance (leveraging Multi-Business Unit functionality). 																																																														
	Spend reporting	●	<ul style="list-style-type: none"> Increased spend visibility across the system. 																																																														
Service	Improved service to campus	●	<ul style="list-style-type: none"> Approval and purchasing process enhanced using negotiated agreements and enhanced technology solution and provides greater category expertise. 																																																														
	Needs of each campus tailored	●	<ul style="list-style-type: none"> Centralized teams can tailor requirements to the set of designated institutions that are grouped based on commonality. 																																																														
Spend Savings	Sourcing savings opportunities	●	<ul style="list-style-type: none"> Maximizes purchasing power, estimated \$4M - \$8M in sourcing savings. 																																																														
	Collaboration	●	<ul style="list-style-type: none"> Participation within institutional grouping, with cross-collaboration when possible. 																																																														
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Summary: Future State Scenarios

Scenarios	Overall Impact	Benefits	Risks
Scenario 1		<ul style="list-style-type: none"> More control for institutions to work together on sourcing events Low impact to current state 	<ul style="list-style-type: none"> Missed collaboration opportunities Duplicative sourcing and bidding processes Tools are not standardized
Scenario 2		<ul style="list-style-type: none"> Collaboration on designated spend categories, driving increased savings opportunities Common systems for Sourcing and Contracts 	<ul style="list-style-type: none"> Process and category expertise depends on strong direction from USHE Moderate implementation costs and change mgmt.
Scenario 3		<ul style="list-style-type: none"> Collaboration on designated spend categories, driving increased savings opportunities Common systems for Sourcing and Contracts 	<ul style="list-style-type: none"> Process and category expertise depends on strong direction from designated universities, potentially adding workload on existing institutional resources.
Scenario 4		<ul style="list-style-type: none"> Greater ease to develop and maintain unified strategy Center of policies, process, and enforcement; eliminate duplicate tasks; maximize savings; category expertise Shared instance of JAGGAER 	<ul style="list-style-type: none"> Perception of service relationship vs. partner relationship Change management needs for new model Major system and process change Overall cost to implement
Scenario 5		<ul style="list-style-type: none"> Needs of large institutions like UofU and USU covered Center of policies, process, and enforcement Shared instance of JAGGAER Savings opportunities through collaboration 	<ul style="list-style-type: none"> Need strong collaboration between UofU, USU and system Change management needs for new model Major system and process change Overall cost to implement
Scenario 6		<ul style="list-style-type: none"> Tailored to needs of institutions by common type Centers of policies, process, and enforcement Shared instance of JAGGAER Savings opportunities through collaboration by type 	<ul style="list-style-type: none"> Segmenting institutions could lead to duplicative efforts, missed opportunities Change management needs for new model Major system and process change Overall cost to implement

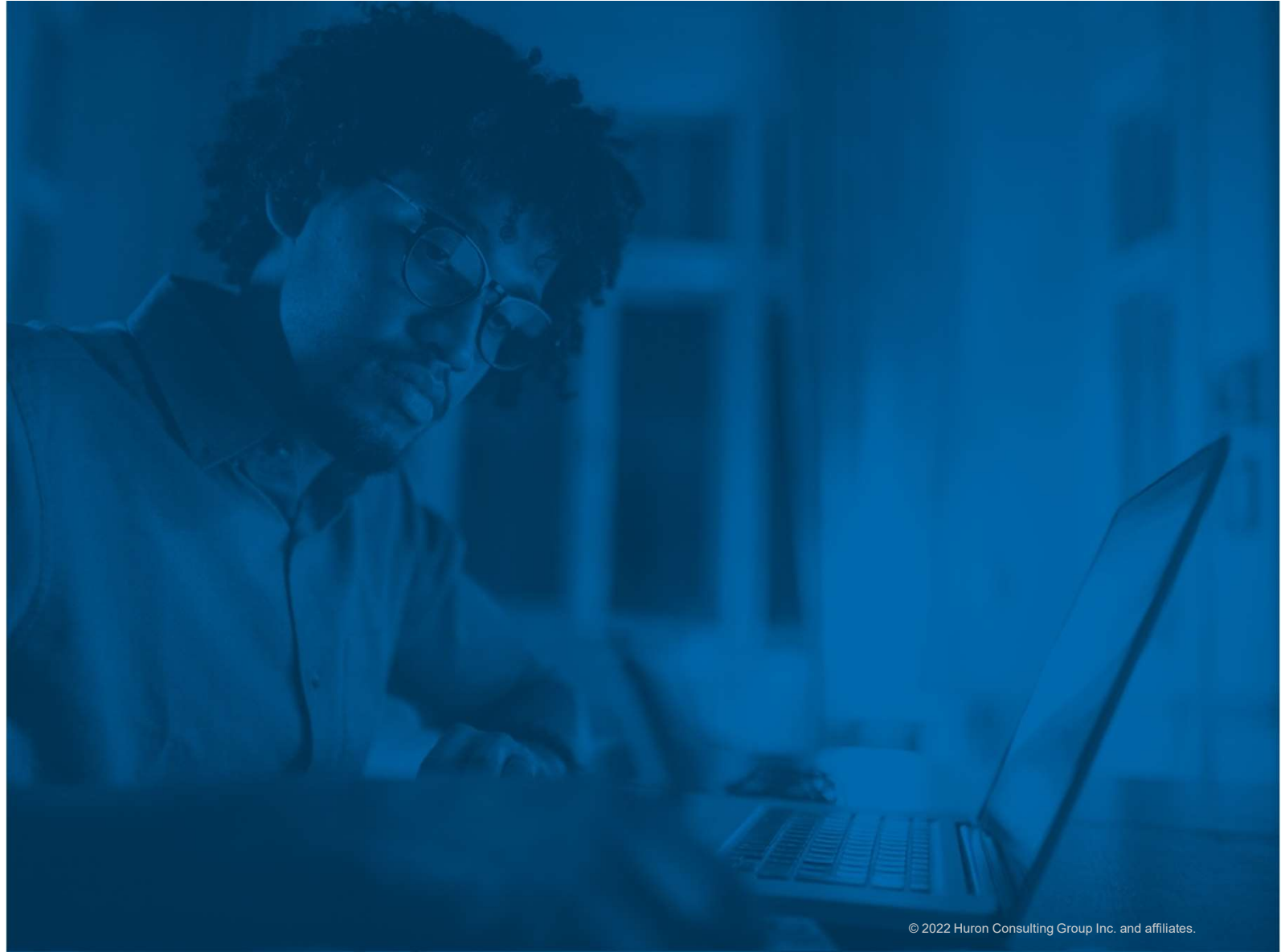
Procurement Model Path Forward

When considering a shift in procurement, USHE must consider a variety of next steps and strategies to plan, select, and implement a new operating model (depending on scenario selected).

Phase	Planning		Selection / Refinement		Implementation / Deployment	
Timeline	Months 1 – 3		Months 4 - 6		Months 7 - 18	
Key Activities	Collaborative working sessions to narrow down model scenarios based on USHE goals Develop conceptual and detailed model designs Determine technology requirements		Select scenario to implement Select technology model Identify resources Develop operating procedures and consolidated policies (depending on model)		Implement technology Shift resources (depending on model) Conduct training Deploy Continuous improvement	
Key Risks	<p>Change management: A large shift in procurement operating models needs connection with stakeholders to promote buy-in by connecting their individual goals with the institutions change goals</p> <p>Related Functions and Processes: Processes including accounts payable, card programs, and travel/expense may be impacted and should be addressed as part of determining and refining the go-forward model prior to implementation</p> <p>Service Quality: A successful transition to a more collaborative procurement model will require reinforcement on procurement’s mission focusing on the value proposition to campuses and establishing service level agreements in a service model</p>					

5

Payroll



Overview of Opportunity

USHE currently pays a premium for payroll services and spends above benchmarks. Payroll services are routine and process-based, making them candidates for outsourcing or shared services.

Executive Summary

- USHE **underperforms key benchmarks**, such as cost per paycheck where USHE **spends 30% more**, which indicates opportunities for improvement
 - These **opportunities are both local and systemwide** with select 4-year institutions having high costs and technical colleges generally being above cost benchmarks
- Institutions have substantially **different operating profiles and systems** for delivering payroll, creating risk and posing challenges for centralization
- The activities of payroll processing make it **a candidate for either shared services or for outsourcing**; many institutions either partially outsource or fully use shared services for payroll

Opportunities Assessed

1

Creating a Technical College Payroll Shared Service Center

Transitioning payroll service delivery to a shared service center would reduce local administrative burden and address service quality challenges

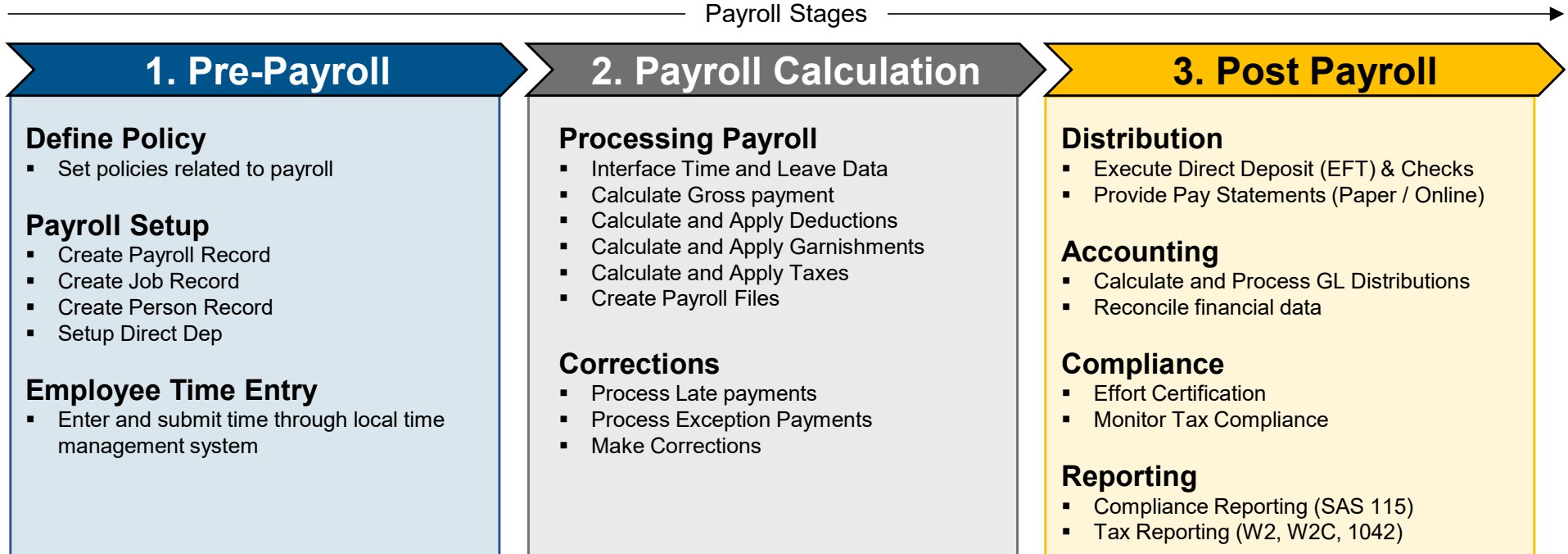
2

Outsource Payroll

Outsourcing all payroll services across USHE would standardize service quality, mitigate risk, create cost savings, and offload the challenging standardization process to an experienced third party

Payroll Life Cycle

The activities listed below are commonly associated the payroll life cycle. Stages 2 and 3, or payroll calculations and post payroll, are well suited for shared services and outsourcing.



Higher Education Payroll Services Comparison

Institutions currently provide most typical services in higher education payroll services, however, the USHE office has little to no involvement with the current campus processes.

Common Services Provided	Institutional Offering?	USHE Involvement?
Shared Services model for Payroll and Employee Service	Few	None
Usage of an ERP system	Most	None
Existence/adoption of online self service tools	Most	None
Relatively complex pay calendar	Most	None
Complex processing around Grants and funding of academic and research appointments	Few	None
Systematic tracking of Time & Labor data and Sick/Vacation balances	Most	None
Usage of Outsourcing for Payroll-related services	Few	None

“We can cut the checks, but that’s about it. We are limited by our lack of IT resources and our manual processes.”

Payroll Systems

USHE institutions operate with a variety of systems to support payroll, creating long-term risks of continued systems, process, and compliance drift, factors which all can increase operating costs.

Institution	Payroll Processing System
Bridgerland Technical College	Jenzabar
Davis Technical College	Outsourced
Dixie State University	Banner
Dixie Technical College	iSolved
Mountainland Technical College	iSolved
Ogden-Weber Technical College	ADP
Salt Lake Community College	Banner
Snow College	Banner + Evisions
Southern Utah University	Banner
Southwest Technical College	Quickbooks
Tooele Technical College	Kony
Uintah Basin Technical College	iSolved
University of Utah	PeopleSoft
Utah State University	Banner
Utah Valley University	Banner
Weber State University	Banner



Systems:

The sixteen USHE institutions use nine unique systems for processing payroll, not including ancillary systems and processes.



Risk Factors:

The variety of payroll systems reduce payroll processing expertise, result in cost inefficiencies from ineffective use of scale, and create challenges in reporting, compliance, and monitoring at the system level.



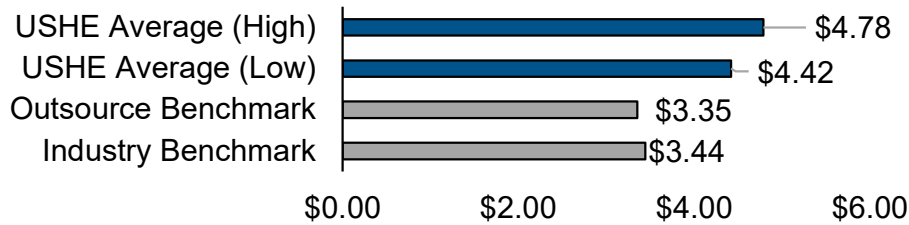
Change Considerations:

Without efforts to standardize, processes and systems are likely to further drift, creating obstacles for future System alignment. This is already evidenced by the technical colleges' six unique systems.

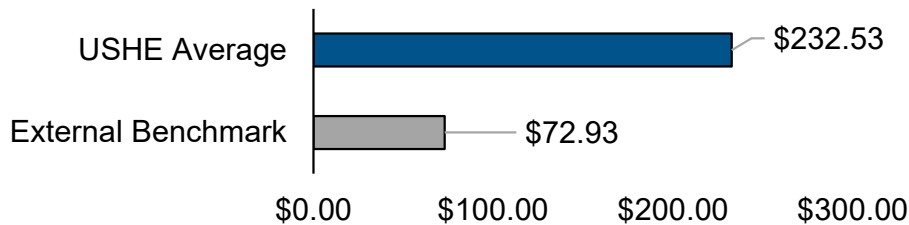
Cost of Payroll Operations

USHE institutions collectively spend \$6.3M annually administering payroll¹. Benchmarks show that USHE operations are more expensive than outsourcing and higher education benchmarks.

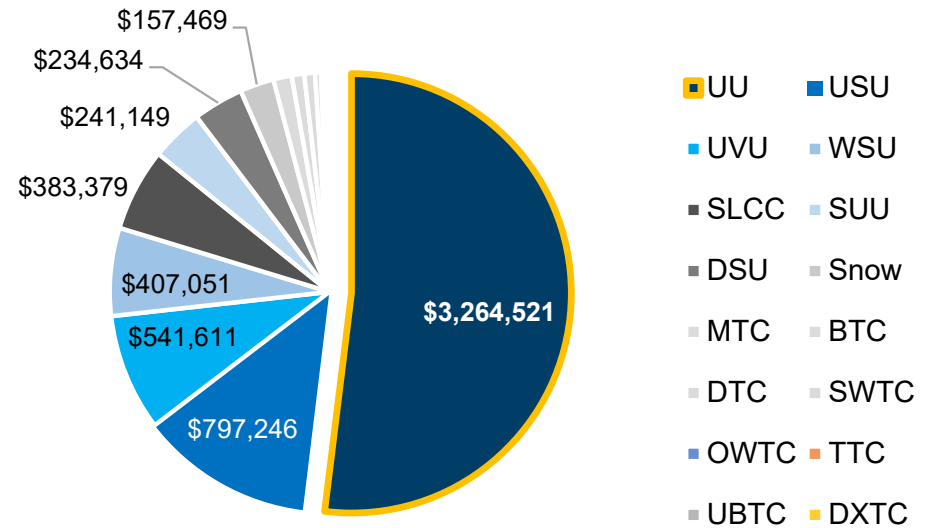
Cost per Payment



Cost per Payee



Cost Contribution by Institution

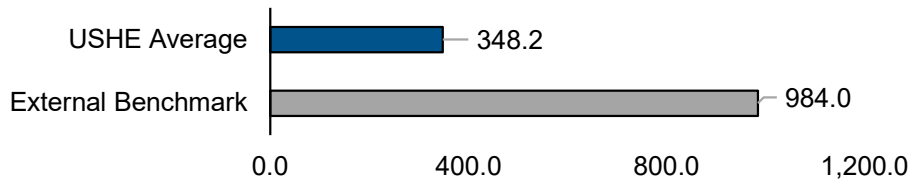


Source(s): Annual payroll spend based on HAAS survey data and does not include overhead or extrapolate for incomplete surveys (25%); ²Benchmarking sources per the American Payroll Association and internal Huron data

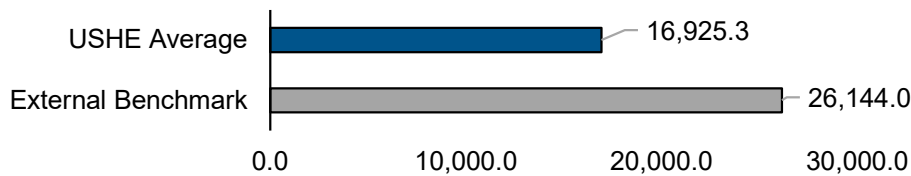
Payroll Efficiency

Payroll efficiency metrics are also below benchmarks, with the range in institutional FTE per payroll FTE ratios showing the relative efficiencies or inefficiencies between USHE institutions.

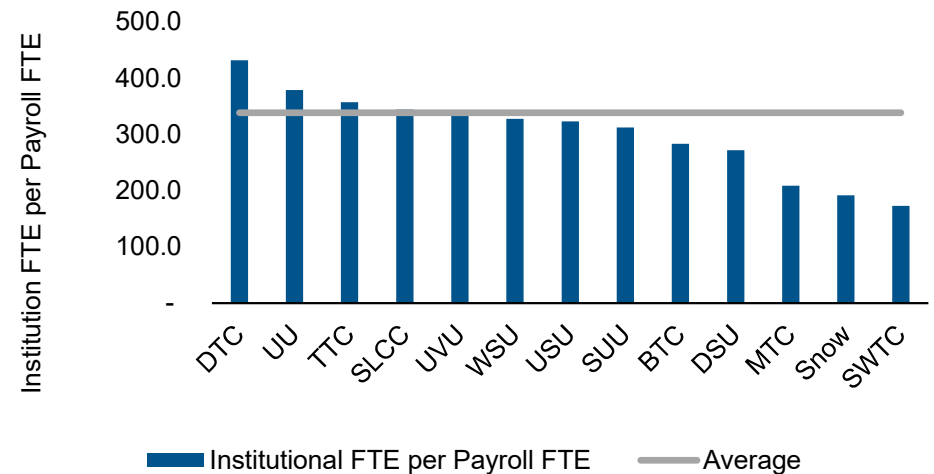
Payees Processed per Payroll FTE



Payments Processed per Payroll FTE



Institutional FTE per Payroll FTE¹

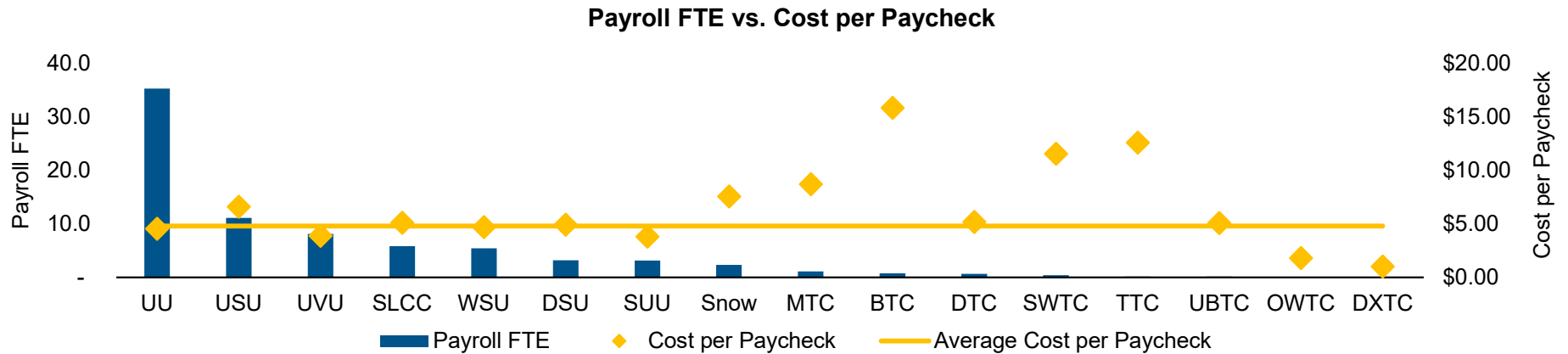


The performance of payments processed per payroll FTE may indicate that USHE institutions are processing more payments than necessary, common for organizations with payroll quality issues.

Note(s): ¹DXTC, UBTC, and OWTC are outlier data points and omitted from graph

Cost and Administrative Support by Institution

Scale of payroll operations vary by institution, with a high of 35.2 FTE and a low of less than 1.0 FTE. Cost per paycheck substantially increases at institutions with smaller operating profiles.

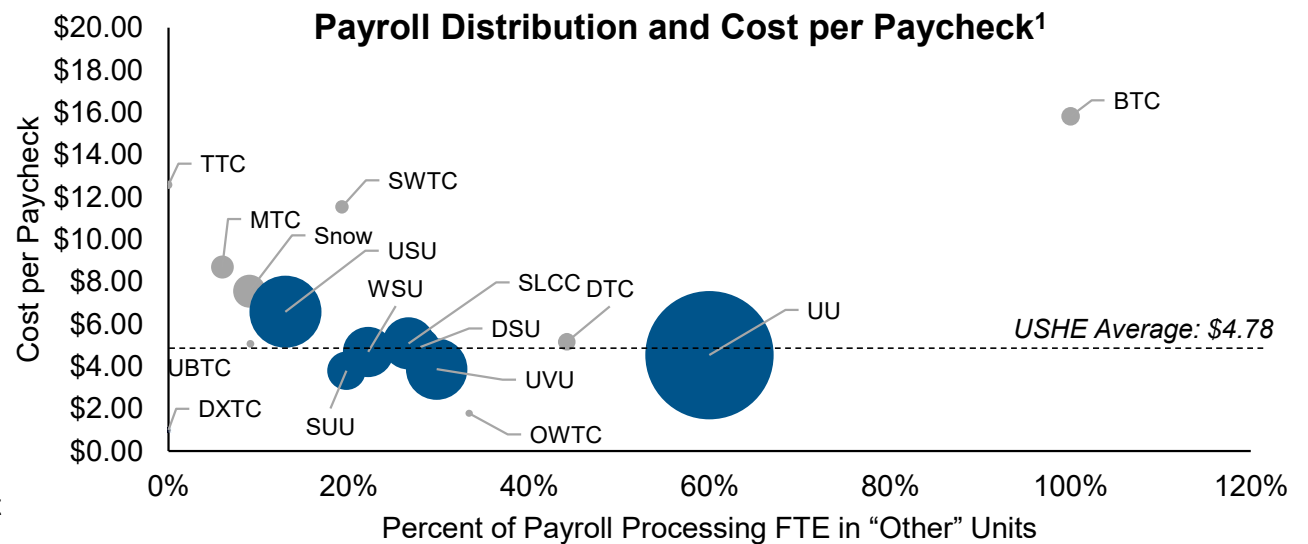
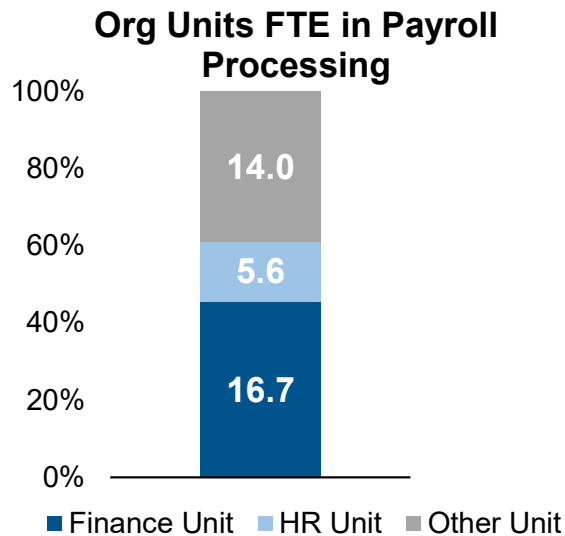


Key Findings

- **14 of 16 institutions spend above the benchmark** for cost per paycheck, showing the opportunity for systemwide improvements
- Technical colleges average cost per paycheck is **\$5.60 while the USHE average is \$4.78** suggesting there is opportunity to improve through scale
- Payroll FTE support is low at the technical colleges
 - The low FTE and high cost is an indicator that **senior staff members are performing basic payroll functions**
- **USU has the highest cost per check of the four-year institutions**, suggesting there is the opportunity for local improvement

Distribution of Payroll Processing Operations

Payroll processing excludes time and leave; only 60% of effort comes from HR and finance units, which are typically the central unit responsible for the activity.



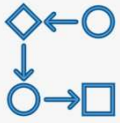

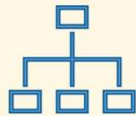


The lower cost per paycheck in more distributed operations shows the impact of payroll complexity, possible inefficiencies with the central units, and risk factors from distributed activity.

Note(s): ¹Bubble size is total payroll FTE

Payroll Themes

Current-state analysis and stakeholder feedback show the opportunity to reduce costs and improve service through operational improvements with the primary barriers being systems and governance,

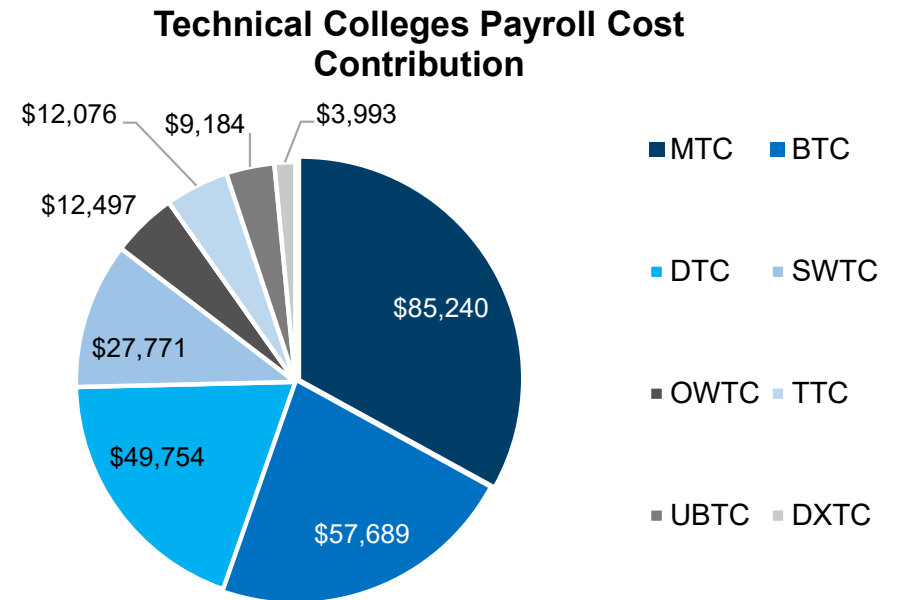
Challenges	<p>1</p>  <p>Cost Premium</p> <ul style="list-style-type: none"> USHE pays above benchmarks for payroll services Six of eight technical colleges are above the USHE average 	<p>2</p>  <p>Inequitable Support</p> <ul style="list-style-type: none"> Payroll staff is not consistent with institution size Service quality varies substantially across institutions 	<p>3</p>  <p>Inefficient Operations</p> <ul style="list-style-type: none"> Support is decentralized Payees processed and payments processed are below benchmarks
	Barriers	<p>4</p>  <p>Multiple Systems</p> <ul style="list-style-type: none"> There is no common payroll system in use across institutions Foundational elements (ex: CoA) are not aligned 	<p>5</p>  <p>Governance</p> <ul style="list-style-type: none"> USHE does not currently have the authority or legal ability to perform essential payroll tasks like check disbursements

Scenario 1: Technical College Shared Service Center

A shared service center that supports the technical colleges could provide an increased level of service while containing future costs.

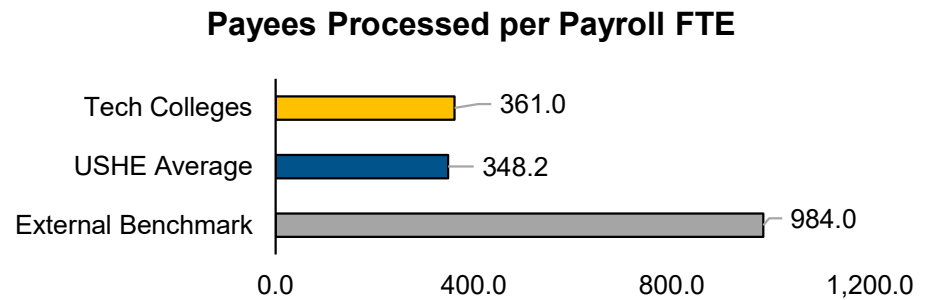
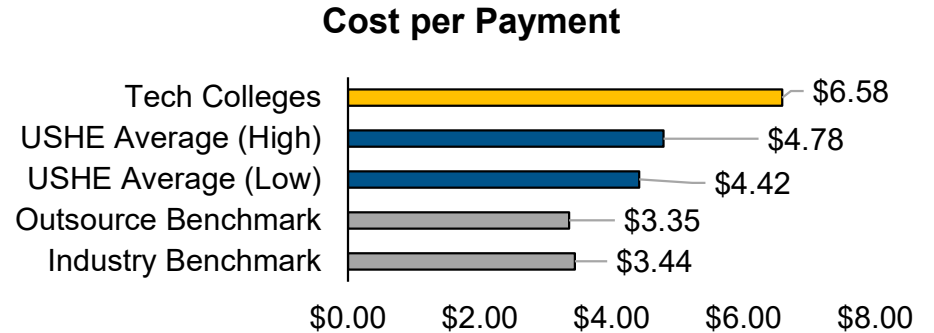
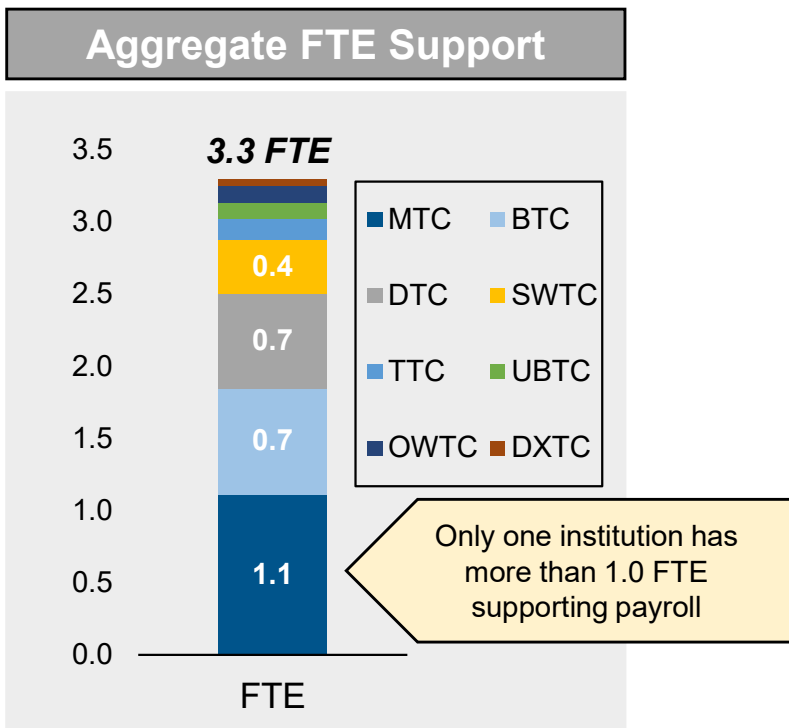
Case for Change

- Technical colleges **do not have enough support and have notable service limitations**, which creates risk
- Despite the low-level of funding, technical colleges **have a higher cost per payment** than the USHE average
- **Functional similarities** between the institutions make them a good fit for sharing services
- A shared service center will **contain costs, improve service quality, and offload administrative work** allowing staff to direct attention to more mission-centric activities



Current-State Payroll Limitations

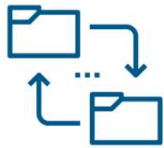
The technical colleges account for \$258.2K of payroll related expense and 3.3 of payroll FTE. They underperform benchmarks with a low level of service, which indicates suboptimal processes.



Benefits of a Payroll Shared Service Center

Shared services addresses issues related to unstandardized processes and improves the level of service at a lower cost than current operations.

Process and Policy Standardization



- The decentralized nature of payroll operations results in instances of **inefficient business processes** and **non-standard policy guidance**
- Centralizing payroll operations would help USHE **reduce and standardize payroll** across the technical colleges

Cost Savings



- Managing payroll operations in-house **with high levels of service** is costly and requires **significant investment at an institutional-level**
- Shifting payroll operations to a shared service center with **payroll expertise can generate cost savings**







Service Quality



- Decentralized payroll operations also can inhibit the ability to provide an **equal level of service** to institutions
- A shared service center will be able to navigate the **complexities and nuances** of payroll, crafting a higher level of service for the institution set

Payroll Shared Service in Higher Education

Providing payroll through shared services is common among higher education institutions and higher education systems. A unified ERP is a common theme and supports efficient processing.

Seal / Logo	Institution Name	Services Provided
	The Texas A&M System	<ul style="list-style-type: none"> Distributions, payroll processing, employment verifications, W-2s, standardized calendars and pay schedules, training, garnishments, Workday tools, payroll and employment related form repository
	The University System of New Hampshire	<ul style="list-style-type: none"> Distributions, corrections, general payroll processing (e.g. calculating and applying deductions, applying taxes etc.), tax reporting, compliance reporting, and reconciliations
	The University System of Georgia	<ul style="list-style-type: none"> Distributions, general payroll processing, employee self service through OneUSG connect, direct deposit forms and maintenance, exceptions log, systemwide policy, integrated service with benefits, and time and leave
	The University of Michigan	<ul style="list-style-type: none"> Payroll processing, distributions, customer service, timekeeping, tax, customer service support, and reporting
	The University of Maine System	<ul style="list-style-type: none"> Distributions, general payroll processing, responsible for accurate and efficient data entry with consistent standardized data entry practices, ensures compliance, W-2s, and manages related policies
	The University System of Illinois	<ul style="list-style-type: none"> Manages payroll schedules, earnings, deductions, taxes, and time reporting; the office also facilitates benefits enrollment of employees on each of the three universities

Shared Service Center Cost Analysis

Cost analysis shows that a shared service center with standard service offerings will provide cost containment and may yield savings while increasing the quality of services.

Estimated Shared Service Center Cost

1,000 FTE for every one payroll FTE¹

\$78.4K average cost per payroll FTE at USHE technical colleges

\$81.0K average cost per payroll FTE at all USHE institutions

3.3K approximate total technical college FTE²

\$258K – \$267K Estimate for annual cost of payroll shared service center for technical colleges

Note(s): ¹Total payroll expenditure increased by 25% from HAAS survey admin cost to account for survey participation (75%) and reduced overhead requirements
Source(s): ¹APA; ²IPEDS

Cost Categories	FTE	Compensation (\$)
Payroll Expenditure		
<i>MTC</i>	1.41	\$107.6K
<i>BTC</i>	0.91	\$72.1K
<i>DTC</i>	0.82	\$62.2K
<i>SWTC</i>	0.48	\$34.7K
<i>OWTC</i>	0.14	\$15.6K
<i>TTC</i>	0.18	\$15.1K
<i>UBTC</i>	0.15	\$11.5K
<i>DXTC</i>	0.04	\$5.0K
Total Technical College Payroll Expenditure	4.12	\$322.8K
Shared Service Center	3.29	\$258K – \$267K
Savings (Investment)	0.83	\$55.8K - \$64.8K

Shared Services Next Steps and Risk Management

During implementation of a shared service center, USHE must consider a variety of next steps and strategies for mitigating any risks.

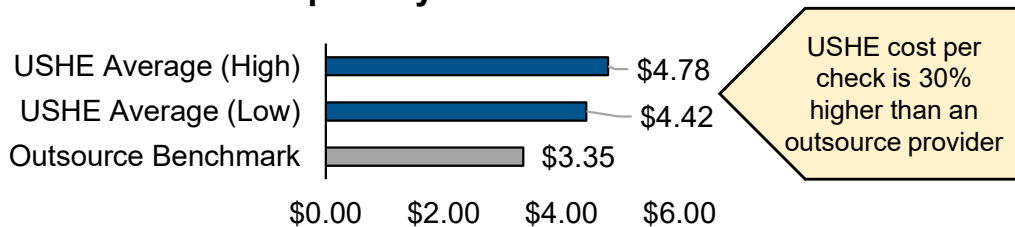
Phase	PLANNING		DESIGN		IMPLEMENTATION	
Timeline	Months 0 - 2		Months 3 - 6		Months 6 - 18	
Key Activities	Conduct activity portfolio Conduct organizational mapping Develop future-state designs		Facilitate workgroups Catalogue recommended outcomes Process mapping Develop transition plan		Hire and onboard employees Communication and change management Systems updates Process transition and implementation	
Key Risks	<p>Systems alignment: Technical colleges will need to be transitioned to the same payroll systems, which has implications for ancillary systems and other structures that intersect with payroll processing</p> <p>Process diversity: The current operating model has a diverse range of processes that would need to be standardized across the institutions</p> <p>Service quality: The quality of payroll related services cannot decrease as a result of the initiative</p>					

Scenario 2: Outsource Payroll

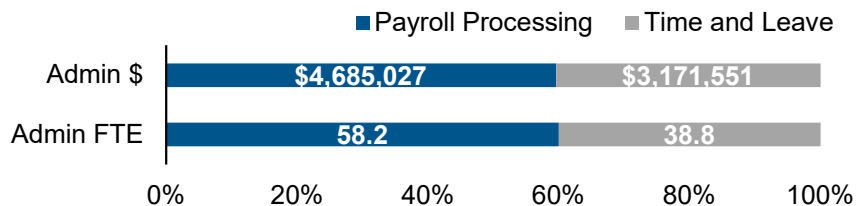
Outsourcing payroll services across all USHE institutions broadly addresses cost issues, releases time and capital for institutional priorities, and contracts expert services for a challenging project.

Benchmark vs. Actuals

Cost per Payment



Capital in Payroll



39.9% of payroll FTE is related to time and leave. Automation technology in the area should be considered

Standardizing Processes

- A primary challenge in standardizing payroll operations will be **navigating the variety of systems, governance, and processes** in place across the sixteen institutions
- The sixteen **USHE institutions use a combined nine unique systems** for processing payroll, not including ancillary systems and processes
 - Stakeholders during interviews said that even when systems are the same, they are so customized to the institution that they are essentially unique
- USHE would require **additional legal and financial authority** as a governing body to disburse employee payments
- Using an **outsourced vendor resolves these complexities** by outsourcing the project work, align institutions on systems or develop work arounds, and does not have any of the associated governance complications with shared services






Outsourcing Benefits

Outsourcing payroll services addresses issues related to unstandardized processes and improves the level of service at a lower cost than current operations.

- **Payroll Expertise:** Outsourced payroll providers work with a variety of clients and have nuanced and specialized expertise in the complexities of payroll processing, taxes, and relevant regulations
- **Standardization:** Shifting payroll responsibilities to an outside organization would create standardization across USHE institutions, allowing for the accurate maintenance of data and the creation of a high level of service
- **Time Saved:** For HR and payroll leaders, the time spent managing complex payroll requirements and time-intensive payroll processes can be diverted to mission-critical activities and institutional priorities
- **Cost Savings:** Outsourcing payroll generates cost savings by shifting away from managing all operations in-house; outsourcing payroll can also generate savings by avoiding any costs associated with acquiring and maintaining technology
- **Mistake Mitigation:** Mitigating mistakes can also generate cost savings and avoid frustration; inability to maintain accurate data can result in overpay, and violating reporting requirements can result in penalties
- **Security:** Outsourced payroll providers offer enhanced security for the confidential and sensitive data associated with payroll activities, providing an additional safeguard against cybersecurity risks
- **Compliance:** A professional payroll provider can help the System stay up to date on governmental regulations, as well as ensure accuracy when tracking employee data and monitoring deductions for federal, state, and local taxes
- **Technology:** Outsourced payroll providers stay up to date with advanced technology that today's employees expect, such as online payroll portals, mobile applications, and a Human Resource Information system

Outsourced Payroll in Higher Education

While many institutions outsource some level of payroll services, higher education has resisted the complete outsourcing of payroll activities.

Seal / Logo	Institution Name	Outsourced Services Description
	Depauw University	<ul style="list-style-type: none"> Access to pay statements, processing, changes to direct deposit information, access to W-2s, address updates, access timecards, register for benefits, and processing
	Bradley University	<ul style="list-style-type: none"> Payroll processing, self-service, W-2s, timecards, paystubs, time management
	Virginia Wesleyan University	<ul style="list-style-type: none"> Payroll processing, employee self service, manger self service
	University of California	<ul style="list-style-type: none"> Employee verification and data management
	Kansas State University	<ul style="list-style-type: none"> Outsourced an automated time and leave function, the project reduced payroll time by 78% and saved \$100K in overhead expenses

Higher Education Themes

- Employee self service is often outsourced
- Service providers offer customized solutions
- Outsourcing of employee documents with minimal customization (e.g., W-2s)

15% of higher education institutions outsource part of payroll services




Recommended Outsourcing Vendor Requirements

Huron recommends outsourced vendors fulfill the requirements below, which are aligned with ensuring comprehensive capacity to support higher education institutions.

Functionality	Requirement Name	Detail
Vendor Requirement	Customer Service Portal	The vendor must have an adequate customer service portal
Vendor Requirement	Vendor Support	The vendor must be able to provide highly responsive support for the System and its employees
Vendor Requirement	Vendor Communication	The vendor must be able to accommodate the following forms of communication
Vendor Requirement	Payroll Compliance	The vendor must be compliant with all payroll rules, regulations, and laws
Vendor Requirement	Industry Experience	The vendor must have experience in higher education
Vendor Requirement	Vendor Location	The vendor must be based or have operations in the United States
Vendor Requirement	Processing Volume	The vendor must be able to process payroll for multiple employees
Vendor Requirement	Years in Business	The vendor must have at least five years in business
Vendor Requirement	Mobile app	The vendor must support a mobile friendly app for employee access
Vendor Requirement	Use of Own Service	The vendor must process their own payroll
Vendor Requirement	Tax Administration	The vendor must be able to handle tax administration
Vendor Requirement	Contingent / Temp Processing Support	The vendor must be able to support processing payroll for contingent and temporary employees
Dedicated Support	Implementation Management	The vendor must provide comprehensive implementation support
Integrations	Banner Integration	The vendor must have the ability to support seamless integration with Banner and other systems
Integrations	Transition & Implementation	The vendor must have the capacity to successfully implement on USHE's desired timeframe

Vendor Scorecard

The vendors below all perform the requisite services for a successful outsourced payroll operation.

			
Tax management and administration	Yes	Yes	Yes
Employee benefit administration	Yes	Yes	Yes
Garnishments and Deductions	Yes	Yes	Yes
Employee Self-Service	Yes	Yes	Yes
Monthly/Quarterly Reporting	Yes	Yes	Yes

Outsource Cost Analysis

Based on internal Huron sources and market analysis, USHE could save between \$284K and \$724K by outsourcing payroll, which represents a three to nine percent decrease in cost for payroll administration.

Cost Categories	FTE	Cost (\$)
Payroll Expenditure		
Total Payroll Expenditure ¹	97.0	\$7.9M
Less Time & Leave Expenditure ²	38.8	\$3.2M
Total Outsourceable Payroll Expenditure	58.2	\$4.7M
Outsource Costs		
Annual Fee	-	\$4.0M – \$4.4M
Training and Implementation Expenses	-	\$1.5M - \$2.3M
Total Outsourcing Costs (Y1)	-	\$5.5M – \$6.7M
Annual Savings³	-	\$284K - \$724K

Annual Fee Calculation
Average Monthly EE: 109,000
Average Cost per EE: \$3.02 - \$3.35
Total Annual Fee: \$3,961,000 – \$4,401,000

Note(s): ¹Total payroll expenditure increased by 25% from HAAS survey admin cost to account for survey participation (75%) and reduced overhead requirements; ²Time & leave category from HAAS adjusted to reallocate payroll processing activity into outsourceable spend; ³Annual savings excludes one-time costs like training and implementation

Outsourcing Considerations and Limitations

Outsourcing payroll services comes with key limitations and considerations, as control is shifted to a private partner. Selecting the right service provider is key to a successful outsourcing initiative.

- **Service Quality:** If the optimal vendor is not selected, ideally one with experience in higher education, the System may experience difficulties in achieving a high level of service for its payroll operations
- **Data Privacy:** In selecting an outsourced payroll provider, the System must consider the organization's requirements for safety and compliance
- **Communication:** While payroll operations may be outsourced, there remains a need for a formal point of communication between USHE and the vendor, and a lack of clarity or attention in this area could result in inefficiencies
- **Identity and Culture:** Employees will have to adjust to service through an outside agency, which may have norms, standards, and processes that are different than an internal payroll structure
- **Loss of Control:** Outsourcing payroll can result in lessened authority over process-oriented decision-making and a narrow group of USHE staff having instant access to full data reporting

Outsourcing Next Steps and Risk Management

When outsourcing payroll services, USHE must consider a variety of next steps and strategies for mitigating any risks.

Phase	PLANNING		DESIGN		IMPLEMENTATION	
Timeline	Months 0 – 3		Months 3 - 6		Months 6 - 18	
Key Activities	Establish which services are best-fit for outsourcing Engage with stakeholders Inventory technologies supporting payroll		Issue RFI Hold informal discussion with vendors Issue RFP Review vendor quotes to decide whether to continue with outsourcing initiative		Determine if implementation partner is needed besides payroll vendor Select payroll outsource vendor and agree on scope of work Begin transition process	
Key Risks	<p>Vendor Selection: Primary consideration should be given to the vendor and potential transition partner, as the project represents a long-term relationship with high employee impact</p> <p>Related Processes: Processes that may appear unrelated to payroll may connect with the service in some way; USHE should identify these in order to minimize implementation disruptions</p> <p>Service Quality: Maintaining a high quality of service is essential for a successful payroll transition; service quality cannot decline</p>					

Summary Recommendations



1 Create a Payroll Shared Service Center

Transition payroll service delivery to a shared service center for the technical colleges

Impact	Benefit
Service	High
Savings	\$55.8K - \$64.8K



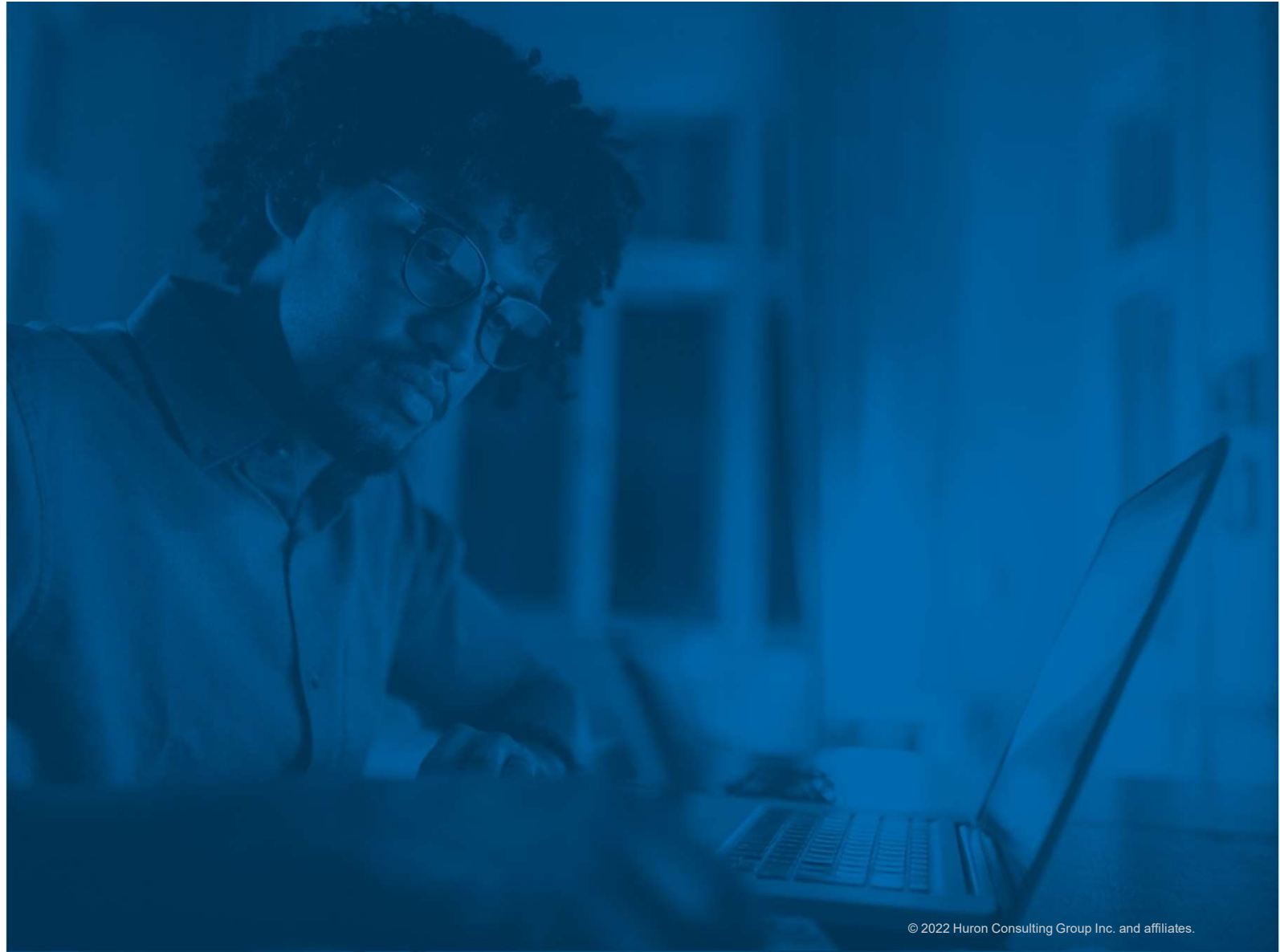
2 Outsource Payroll Across USHE Institutions

Transition payroll service delivery to an outsourced vendor for specified payroll activities

Impact	Benefit
Service	Moderate
Savings	\$284K - \$724K

6

Compensation & Classification



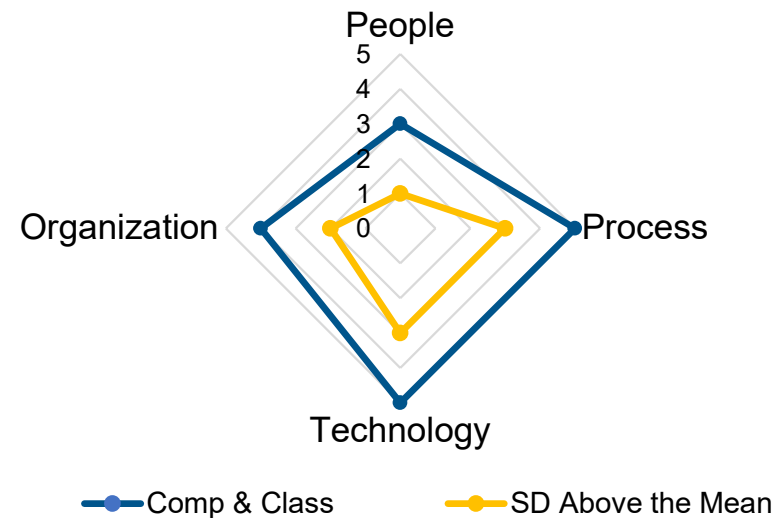
Overview of Opportunity

USHE provides minimal central policy, oversight, or guidance related to compensation and classification to institutions. A compensation and classification study would yield informative to transformative results.

Executive Summary

- High-level analysis of select institutions reveal **that the same positions can have varied role responsibilities** and compensation levels
 - There is **title proliferation** within institutions, creating challenges for HR units
- **The current structure carries risk** factors, such as litigation; nationally, the EEOC¹ has increased payouts and higher education has faced several high profile, million dollars lawsuits
- A compensation and classification study would **proactively seek to understand where improvements can be made to reduce risk and improve retention** and support establishing processes and structures for long-term success

OFI Survey Results



OFI respondents reported “comp & class.” as the area with the most room for improvement.

Current-State Sample Analysis Disclaimers

The following sample analysis of USHE's current-state are high-level reviews meant to show potential areas for future considerations and assessment. Analysis mainly focuses on UU for consistency.

The following analysis is:

- Meant to facilitate conversation regarding classification and compensation
- Based on actual census data
- Limited to select positions and analysis

The following analysis is not:

- Comprehensive of a complete compensation and classification study
- Fully inclusive of institutional nuance
- Meant to represent recommendations



Current-State Sample Analysis: Title Proliferation

Position title counts compared to employee IDs indicate title proliferation at USHE institutions. This can create challenges for oversight of position performance and systemwide HR initiatives.

Institution	Position Titles	Employee IDs
BTC	63	67
DTC	81	90
DSU	250	261
DXTC	17	20
MTC	60	93
OWTC	44	47
SLCC	436	678
Snow	96	115
SUU	346	391
SWTCH	26	27
TTC	21	26
UBTC	21	23
UU	1,680	4,309
USU	399	1,513

Institution	Position Titles	Employee IDs
UVU	1,031	1,247
WSU	574	778
Total (In-Scope Only)	4,955	9,685
Total (All Positions)	10,095	50,382

Analysis Observations

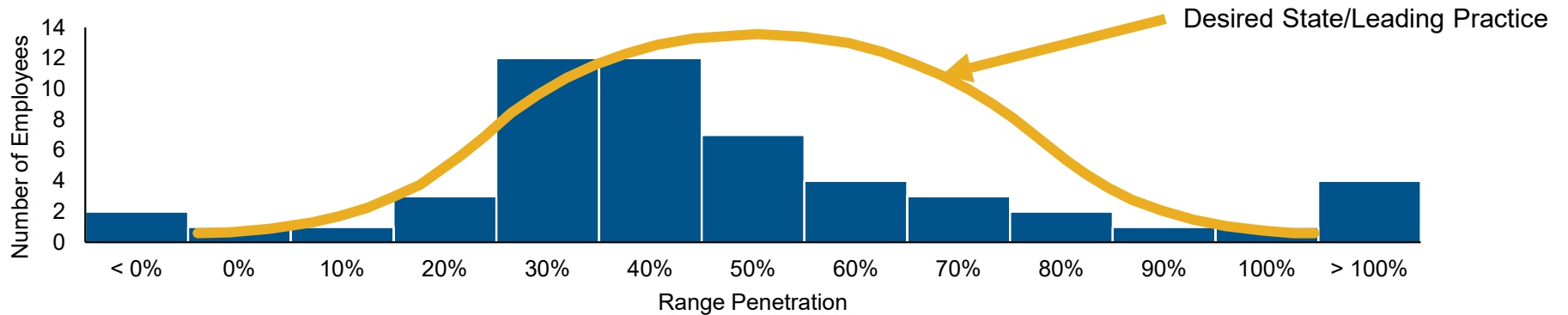
- Surveyed employees show **high-levels of title proliferation**; for every ten employees there are **5.1** titles
- The results are supported by census wide data, where **for every ten employees there are two titles**, and the increase is mainly attributable to faculty and adjunct positions

Note(s): "In-Scope Only" titles refers to employees surveyed. All positions total refers to all positions included in the provided HR census information

Current-State Sample Analysis: Position Pay

Misalignment between grade penetration and a normal distribution may demonstrate inequity as well as an additional need for pay program consistency.

UU Systems Administrators with Range Penetration of x%



Observations

- The grade penetration for Systems Administrators at UU **do not align** with leading practices
- Select employees are **outside of the policy range**, being either below 0% of the grade penetration or above 100%
- Additional analysis could show if UU should reassess the position band

Methodology

- Range penetration is the **percent through the salary range at a given employees compensation**;
 - Example: an employee earning \$75K in a range of \$50K – \$100K has a penetration of 50% $(\$75K - \$50K) / (\$100K - \$50K)$
- Systems Administrators assumed to have salary grade “F”¹

Source(s): 1: Position grade per [HR job code table](#) and grade bands per [HR salary schedule](#)

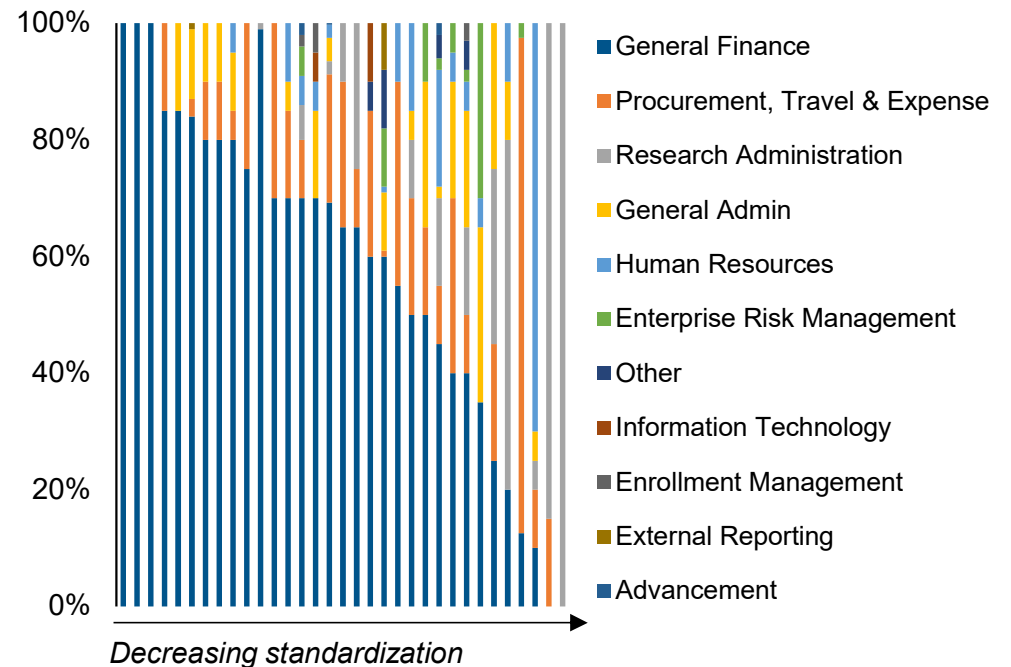
Current-State Sample Analysis: Role Fragmentation

Sr. Accountants at UU reported fragmented and inconsistent job responsibilities, which can create challenges related to career pathways, equitable pay, and hiring.

Observations

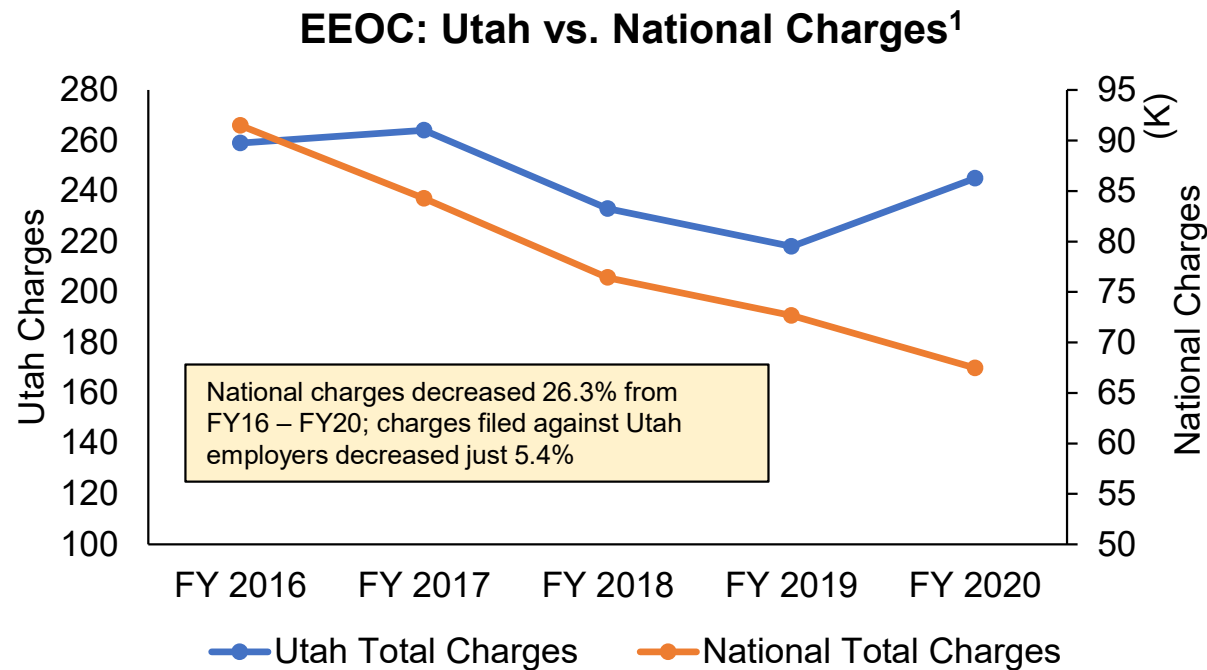
- Position titles such as “Sr. Accountant” often have consistent responsibilities aligned with their functional area; however, **HAAS survey data from 33 UU Sr. Accountants shows that work is fragmented and inconsistent** with activity occurring in eleven different functional areas
- Job responsibilities have a wide range; **Sr. Accountants vary from highly specialized finance employees to generalists** spread across several functional areas
- The analysis is consistent with other position function distributions**, such as administrative assistants and academic advisors, suggesting potential issues with how job titles are assigned

Sr. Accountant Comparison (UU)






Market Risk Trends

Inconsistent pay practices can be litigation risks. While related litigation has decreased, factors related to Utah, financial settlements, and higher education warrant an analysis of compensation practices.



Market Risk Trends

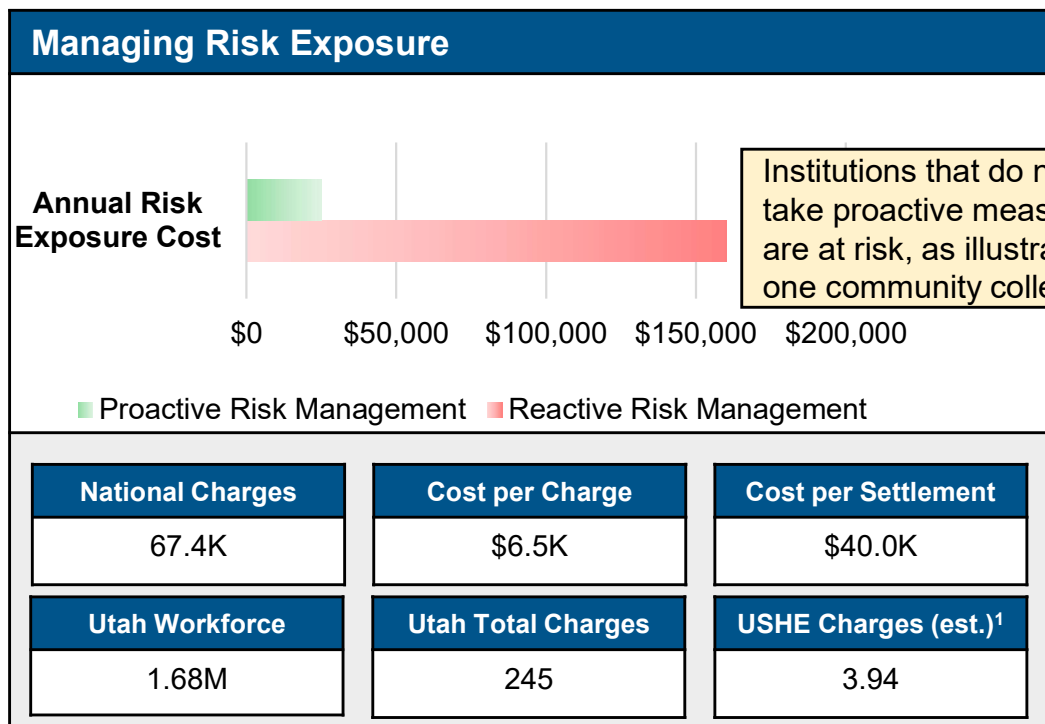
- 
National vs. State
 Utah has diverged from the national decrease, creating risk for Utah employers
- 
Increased Payouts
 Total recoveries increased from \$400M to \$605M over five years
- 
Higher Education
 Several high-profile lawsuits are in higher ed (see following business case)

Note(s): ¹A charge of discrimination is a signed statement asserting that an employer, union or labor organization engaged in employment discrimination

Source(s): ¹EEOC Data; ²[Community college to pay employee \\$1.4M](#)

Managing Risk Exposure

Based on national, state, and peer trends, USHE should expect some number of charges each year. The most effective way to mitigate this risk and cost is to proactively ensure that those charges are meritless.



Note(s): ¹USHE estimate is based on applying average Utah charge rates to the number of USHE employees

Source(s): ¹[Des Moines Area Community College Case Study](#)

Case Study:






Des Moines Area Community College



- Des Moines Area Community College, a six-campus institution, was **sued for pay discrimination on the basis of gender** in 2020
- The lawsuit was brought forward by an applications support analyst who **alleged she had been paid “tens of thousands of dollars less”** than a male colleague **despite having the same title and responsibilities**
- In just ten days, **the jury sided with the plaintiff**, ordering the community college to pay over **\$220K in back pay, \$986K for emotional distress, plus interest, for a total of \$1.38M**
- Additionally, the institution incurred legal, reputational, and cultural costs from the case

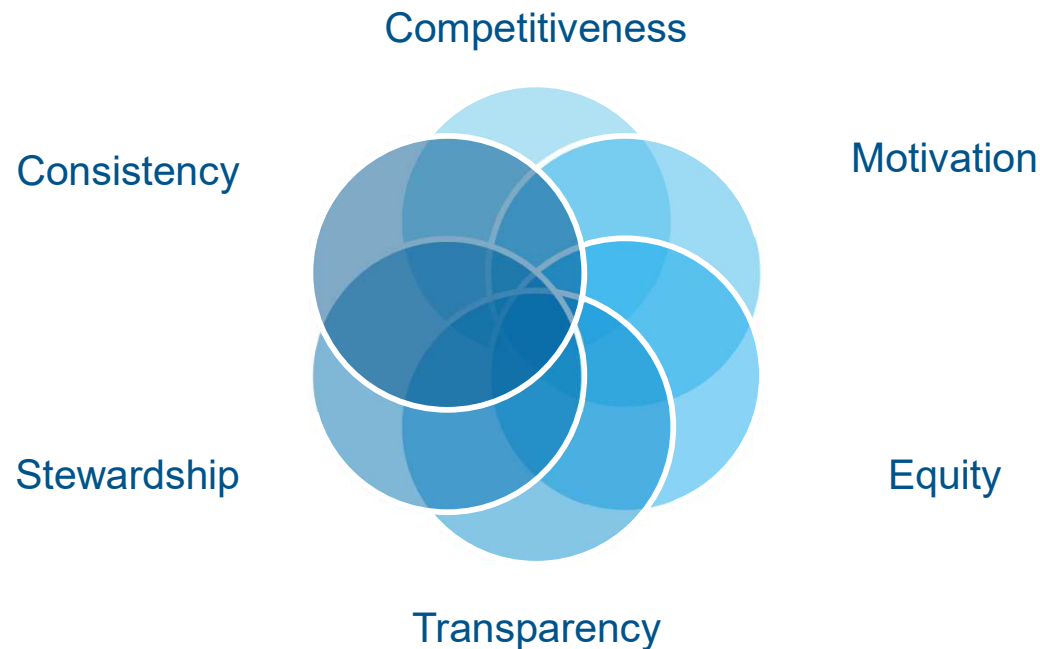
Peer Examples

Many systems conduct compensation and classification studies in order to better administer position management from the system office.

Seal / Logo	System	Initiative	Description and Benefits
	University of Tennessee System	System Compensation Project	<ul style="list-style-type: none"> Improved hiring form to more accurately describe jobs, updated job families, created a statewide human resources team, currently studying gaps in pay and benefits on the updated position descriptions and revised job families
	The Texas A&M System	The Texas A&M System-wide Pay Plan	<ul style="list-style-type: none"> Standardized, systemwide pay plan classifications with associated job title, title code, salary pay grade, FLSA exemption status, and job family for positions Overseen at the System level
	University System of Georgia	The BCAT Project	<ul style="list-style-type: none"> Updated the centralized job classification and compensation structure Eliminated obsolete, mandatory job titles Supported consistent legal compliance and reporting across 34 institutions Created flexibility & reduces shadow systems at the campus level
	University of California	Career Tracks & Series Concepts	<ul style="list-style-type: none"> Career Tracks enables UC to define job titles consistently within each location and across the university. It offers standardized job classifications, career paths, compensation that is aligned with the market, and professional development. UC plan to integrate all its institutions with career tracks
	University of North Texas System	UNT World Staff Market Analysis	<ul style="list-style-type: none"> Consolidated differing pay structures of four institutions into a single unified pay plan Created consistency in job analysis across institutions and streamlined pay grades

Compensation Study Transformative Goals

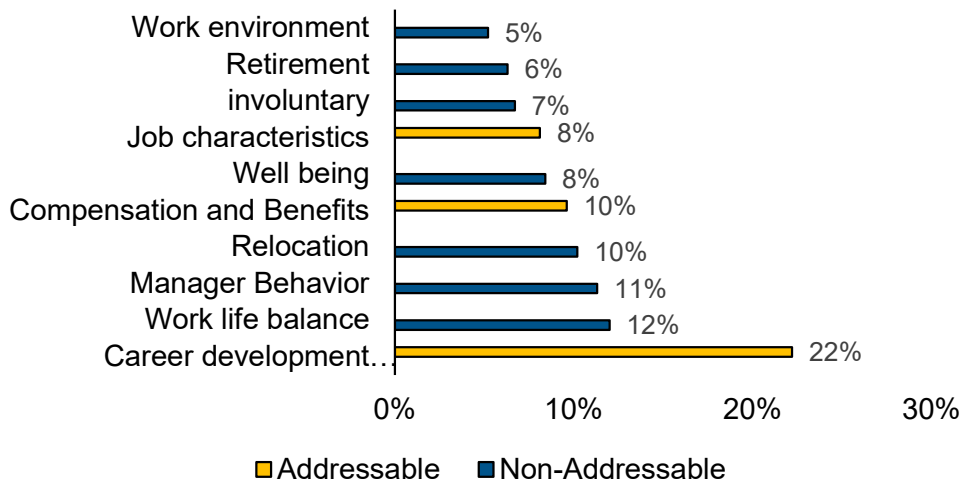
Depending on project scope, the goals of a compensation study are to create the information, processes, and organizational structures necessary to harmonize key factors for improving position management.



Effective Employee Management and Turnover

Turnover is a way to measure the effectiveness of employee management. Initiatives such as a compensation and classification study reduce workplace turnover creating financial benefit.

Why Employees Quit¹



40% of employee turnover is addressable through better position management.

Source(s): ¹The Work Institute; ²HEP inc.; ³Internal Huron sources

Estimated USHE Turnover Cost

34% annual turnover of higher ed administrators in 2021
(up from 12% in 2018)²

1.33 x Salary conservative estimate for the cost of turnover³

\$820M Conservative estimate for USHE administrative position spend (HAAS data)





\$131 – \$371M Conservative estimate for annual cost of turnover at USHE institutions

Scenario 1: Conduct a Study

Conducting a compensation and classification study across the System will give USHE institutions information about the current-state of compensation and leave implementation to each institution.

Scenario Description	Areas of Insight
----------------------	------------------

- The study would analyze compensation and classifications across the System, **evaluating internal campus structures, intra USHE comparisons, and market best-practices and benchmarks** for areas of risk and opportunities for optimization
- While the study would provide meaningful and useful information, **it may not generate positive change**, as there is no charge for institutions themselves to act
- Study is comparable to R811 3.3. Market Surveys, where **OCHE is charged with conducting market surveys for non-exempt personnel**; but there may be gaps in frequency or comprehensiveness

	Pay inequities and risk analysis
	Market competition
	Best-practice analysis
	Intra-USHE comparisons

Addressable Turnover Reduction	Savings (Low)	Savings (High)
0-1%	-	\$524K

Scenario 2: Create Common Job Classification Structures

After completing the initial study, USHE can establish common job classification structures in order to address potential risks, inequities, and other areas of importance across the entire System.

Scenario Description	Creating Common Job Structures						
<ul style="list-style-type: none"> Common job classification structures across a System represent standardized job families, jobs, positions, pay grades and salary ranges Utilizing common job classification structures streamlines employee transfers across institutions, establishes career pathways within institutions, facilitates institutional equity analysis, supports consistent legal compliance and reporting, and other benefits Designing job classifications requires extensive stakeholder engagement, market analysis, and change management in order to succeed <ul style="list-style-type: none"> For mandatory adoption of the classifications, USHE would need additional governance authority 							
	<table border="1"> <thead> <tr> <th data-bbox="1058 1216 1524 1265">Addressable Turnover Reduction</th> <th data-bbox="1528 1216 1759 1265">Savings (Low)</th> <th data-bbox="1764 1216 1995 1265">Savings (High)</th> </tr> </thead> <tbody> <tr> <td data-bbox="1058 1268 1524 1317">1-3%</td> <td data-bbox="1528 1268 1759 1317">\$524K</td> <td data-bbox="1764 1268 1995 1317">\$1.6M</td> </tr> </tbody> </table>	Addressable Turnover Reduction	Savings (Low)	Savings (High)	1-3%	\$524K	\$1.6M
Addressable Turnover Reduction	Savings (Low)	Savings (High)					
1-3%	\$524K	\$1.6M					

Scenario 3: Create System Office Governance

To maintain continuous improvement, USHE can create a unit within the System Office that is responsible for overseeing compensation and classification across the System.

Scenario Description	Example Governance Structure			
<ul style="list-style-type: none"> After the completion of the study and development of standardize job classifications to support equity and career development, establishing a unit with the System Office will support continuous improvement and increase the likelihood of savings attainment <ul style="list-style-type: none"> The establishment of such a unit may require governance revisions The unit would be responsible for monitoring comp and class, updating structures as needed, and supporting institutions leverage the new system These system administered units are industry best-practice, with several systems using similar structures 	<pre> graph TD A[Institutions] --- B[Inst. HR] C[USHE HR] -.- B </pre>			
Roles and Responsibilities				
USHE HR: Oversees systemwide compensation and classification initiatives and supports compliance with institutions				
Institutions: Oversee campus HR and coordinate with USHE as needed				
Institutional HR: Direct reporting to respective institution with dotted line reporting to USHE HR for compensation and classification areas				
Addressable Turnover Reduction			Savings (Low)	Savings (High)
3-5%			\$1.6M	\$2.6M

Scenario Summary

Below presents the summary range from least to most transformational. Each scenario is builds on the previous one.



Scenario 1: Conduct a Study

Employee Impact	Risk Prevention	Cost Impact
Low	Moderate	\$0-524K

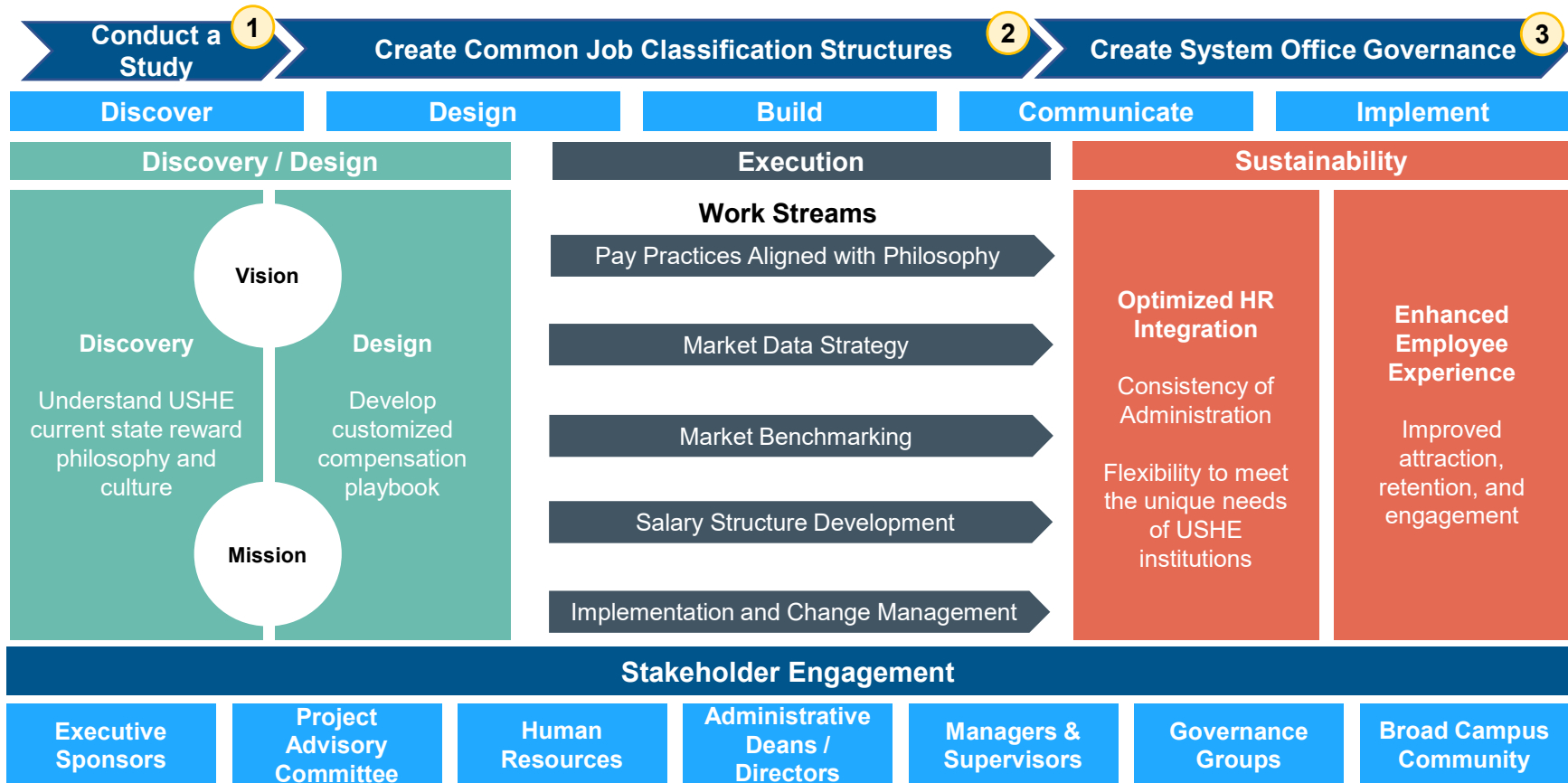
Scenario 2: Create Common Job Classification Structures

Employee Impact	Risk Prevention	Cost Impact
High	Moderate	\$524K-1.6M

Scenario 3: Create System Office Governance

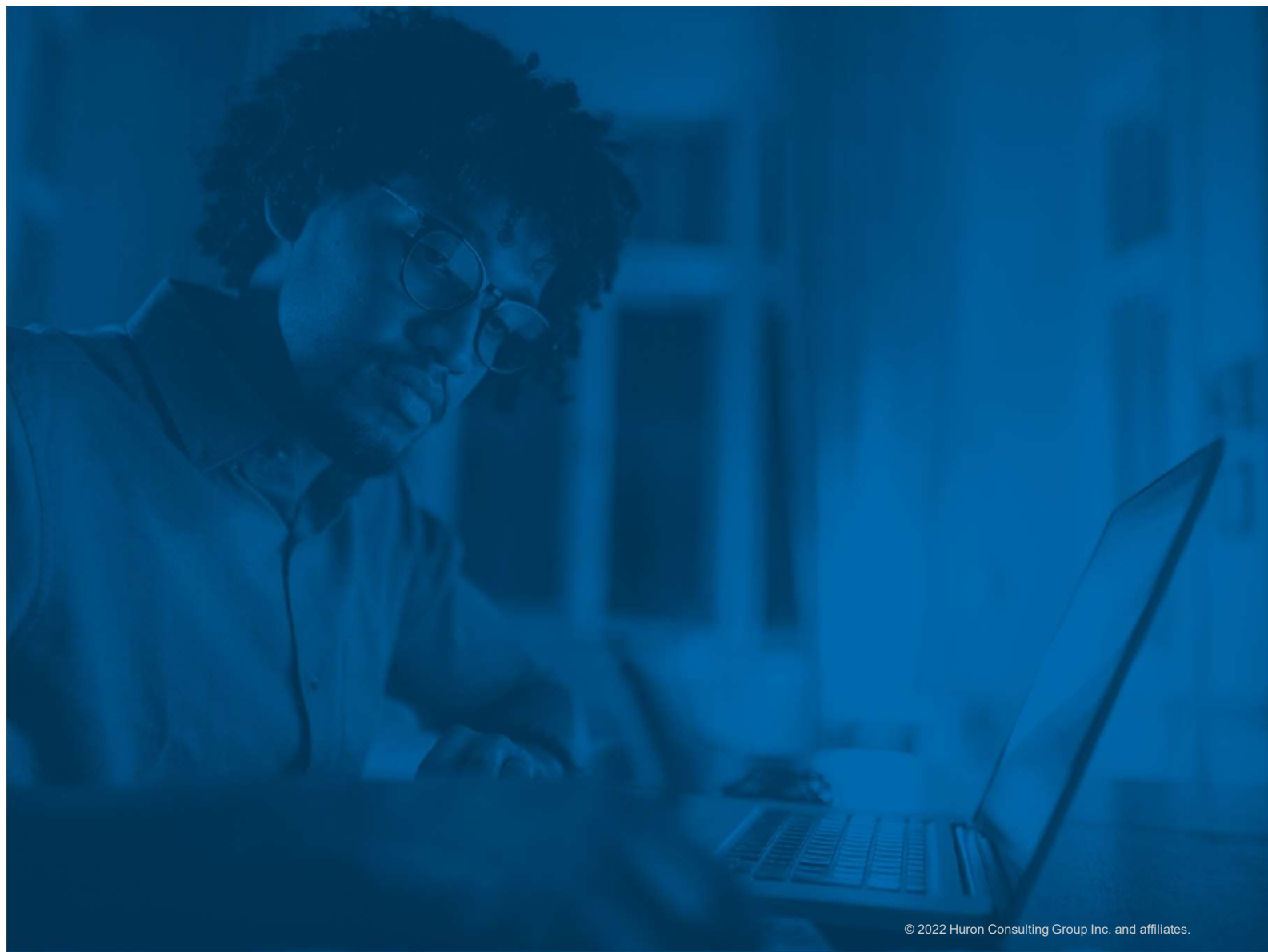
Employee Impact	Risk Prevention	Cost Impact
High	High	\$1.6-2.6M

Implementation Approach



7

Shared Benefits Administration



Overview of Opportunity

Establishing shared benefits and shared benefits administration leverages USHE's size to improve bargaining power and reduces redundant administrative work at the institution level.

Benefits Overview

- Each institution is currently responsible for their benefits operations, which has created **several different operating models** and limits the advantages and abilities to collectively negotiate and support benefits administration
- USHE's current governance structure:
 - Does allow for **shared administrative support** of benefits
 - Does **not allow for systemwide shared benefits**
- The diverse range of current benefit administration and plan makes **the alignment of benefit plans, processes, and policies a prerequisite for realizing savings** from shared services

Key Metrics¹

\$451.3M annual USHE spend on employee benefits

70% the increase in benefits spend from 2012

\$1.2M annual spend on benefits administration

Source(s): ¹Data from USHE Data resources and HAAS data

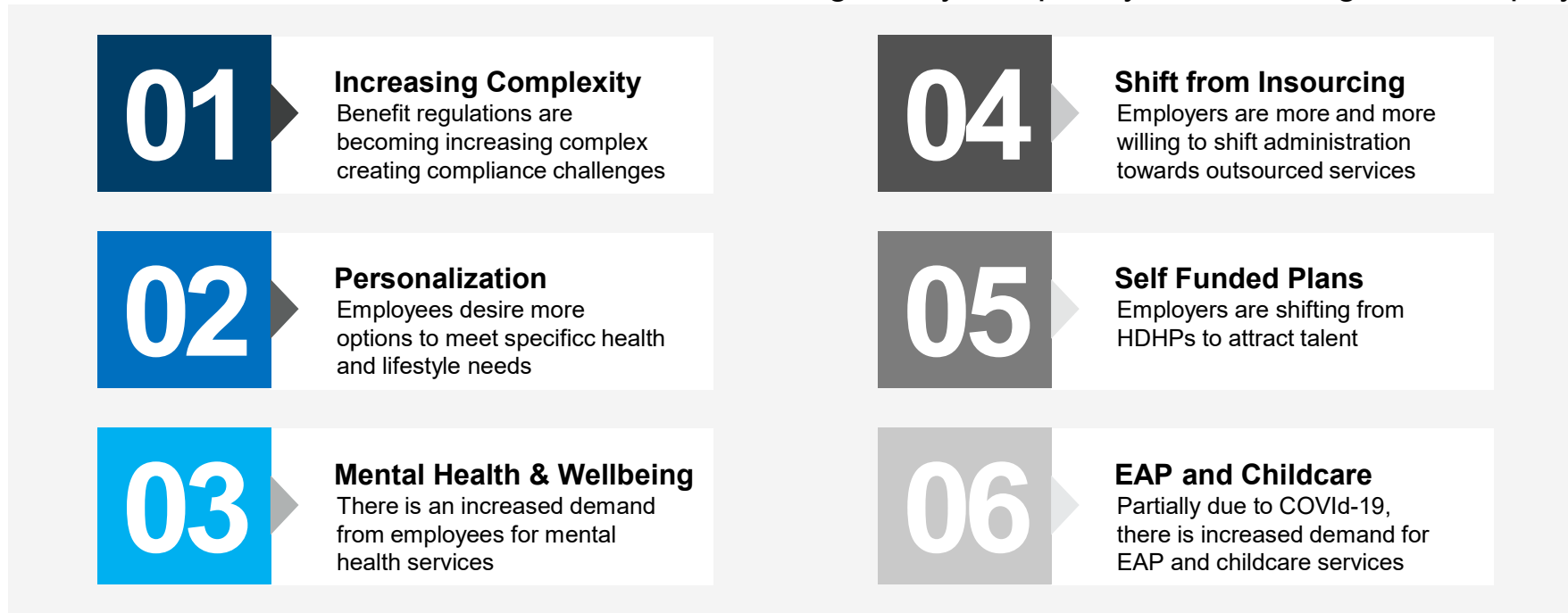
Benefit Administration Tasks and Responsibilities

Benefit administration encompasses processing, customer support, and strategic support that facilitate enrollment and offering of benefit packages at an optimal price point.

Processing	Performing benefits related processing	Documenting administrative procedures for benefits processes	Processing claims and invoices
Customer Support	Supporting employee enrollment in benefits	Employee education on benefits related needs	
Strategic Expertise	Advising on institutional benefit plan selections	Working with brokers and negotiating optimal arrangements	Support choosing best benefit provider and options for institution
	Ensuring regulatory compliance		

Trends in Benefit Administration






Employees seek nuanced services personalized to their needs, while also seeking lower premiums and deductibles. These shifts, combined with increased regulatory complexity, are challenges for employers.



Source(s): ¹[ADP Benefits Study](#); ²[SHRM Trends in Benefit Administration](#)

Higher Education Benefits Administration

Many higher education state systems centrally manage and administer benefits to their constituent institutions.

Seal / Logo	System Name	System Provided Benefits
	The Texas A&M University System	<ul style="list-style-type: none"> The system office offers health and welfare insurance plans, optional retirement savings opportunities, negotiates contracts with carriers for insurance. and provides employee customer service
	The University System of Georgia	<ul style="list-style-type: none"> The system offers and administers a comprehensive suit of benefits including retirement plans, group health insurance, group life insurance, disability insurance, and more
	The University of Maine System	<ul style="list-style-type: none"> Maine offers a centralized, one-stop resource for benefits enrollment, information and assistance; the system is responsible for the administration of employee benefits
	The University of Texas System	<ul style="list-style-type: none"> UTS centrally administers and provides medical insurance with prescription drug coverage, dental, vision, life, AD&D, disability insurance, wellness resources, retirement plans, and FSA
	The University System of Maryland	<ul style="list-style-type: none"> Maryland provides health benefits, prescription drug coverage, retirement plans, life insurance, long-term disability insurance, EAP and wellness resources

Benefit Administration: USHE Overview

In contrast with other state systems, each USHE institution chooses their own providers and is responsible for the administrative support. Governance is a key enabler for opportunities.



Medical Benefits Overview:

- USHE institutions use several providers and a mix of self insured and fully insured options
- PEHP is a state option that covers most benefit areas

Medical Benefits Examples:

- Health coverage, prescription drug coverage, COBRA, etc.



Retirement Benefits:

- USHE institutions each use their own retirement plan providers
- Legacy Utah employees are eligible for the URS pension; new employees are not allowed to participate

Retirement Benefit Examples:

- Pensions, 401(a), 401(k), 403(b), etc.



Supplemental Benefits:

- Supplemental benefits cover a range of benefit areas
- The institutional impact is lower and is an opportunity for incremental USHE involvement

Supplemental Benefit Examples:

- Vision, childcare, life insurance, EAP, etc.

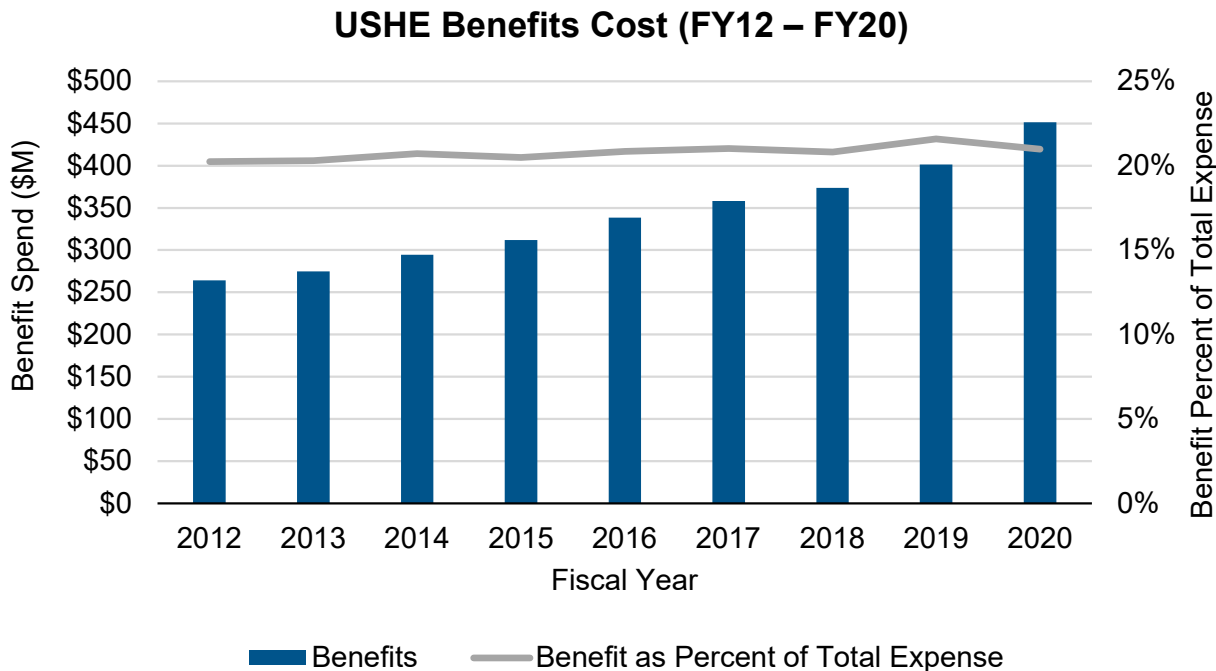


Administration & Governance :

- Each institution oversees its own plans and administration
- In the current-state, USHE is not able to offer shared benefits
- USHE can provide administration, however, without plan alignment, central administration may be ineffective

Benefit Expenditure Trends

USHE spend on benefits has steadily increased while remaining a constant percent of total expenditure, indicating that USHE can better leverage its increasing scale to reduce benefit costs.



Source(s): [USHE Data Resources](#)

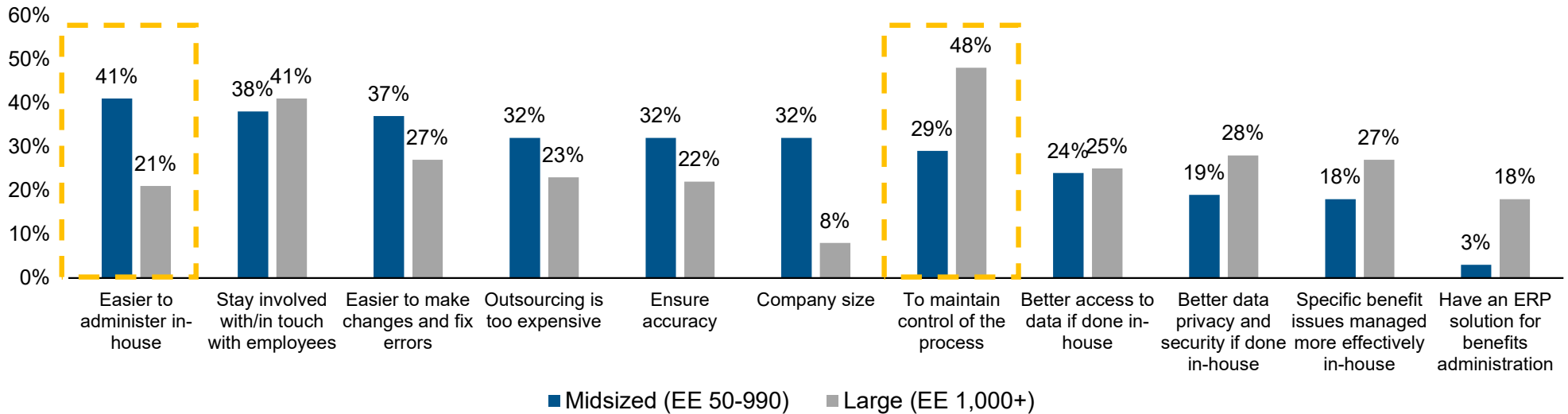
Findings

- Benefit expenditures **have increased by 70%** from FY12 to FY20
- **Benefits do not represent a growing share of expenses**, maintaining a range of 20% – 21% of total expenditures
- USHE can reduce and **contain benefit costs by working as a collective** to take advantage of the increase in USHE institution scale

USHE Stakeholder Considerations

When asked about the need to maintain in-house benefit administration, large and midsized organizations report different needs, an important consideration for USHE’s diverse constituency.

Reasons for Maintaining In-House Benefits Administration



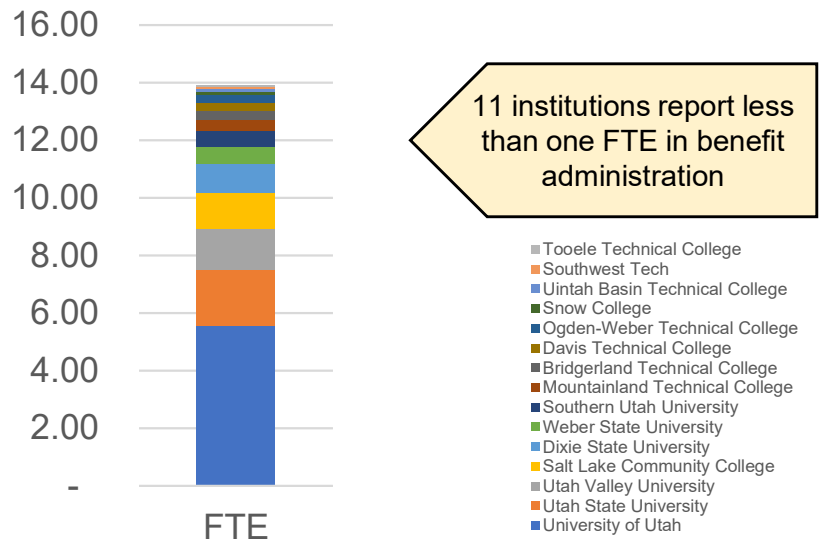
Large organizations report ease of administration as being a factor at half the rate as midsized organizations, indicating potential advantages of scale for USHE.

Source(s): [ADP benefits survey](#)

Benefit Administration: Administrative Support

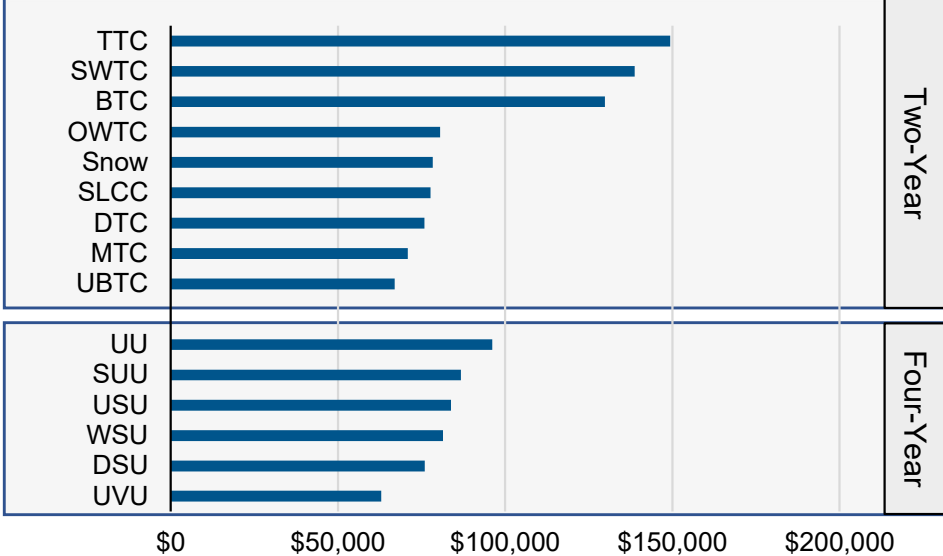
USHE spends 13.9 FTE and \$1.2M on support benefit administration per year. Through centralized support and specialization, this area could see efficiencies through centralized administration.

Benefit Administration Admin Support



Low support creates compliance risks, which can be reduced through routine audits.

Benefit Admin Cost Per FTE



Smaller institutions generally have higher costs per FTE, a sign of operational inefficiency.

Shared Benefits Change Considerations

USHE should prioritize areas with low barriers for implementation and develop governance structures needed to address operational inefficiencies with benefits and benefits administration.

Governance Barriers

- USHE does not have a governance structure that allows it to provide shared benefits
- USHE does not have an enforcement mechanism to require participation in shared services

Operational Inefficiencies

- Redundant retirement plan providers
- Ineffective leveraging of scale
- Multiple plan administrators
- Risks from low FTE support institutions

Lack of Burning Platform

- Stakeholders were generally positive about their benefit offerings and their administration
- Benefit expenses are not increasing as a percent of operating expenditures

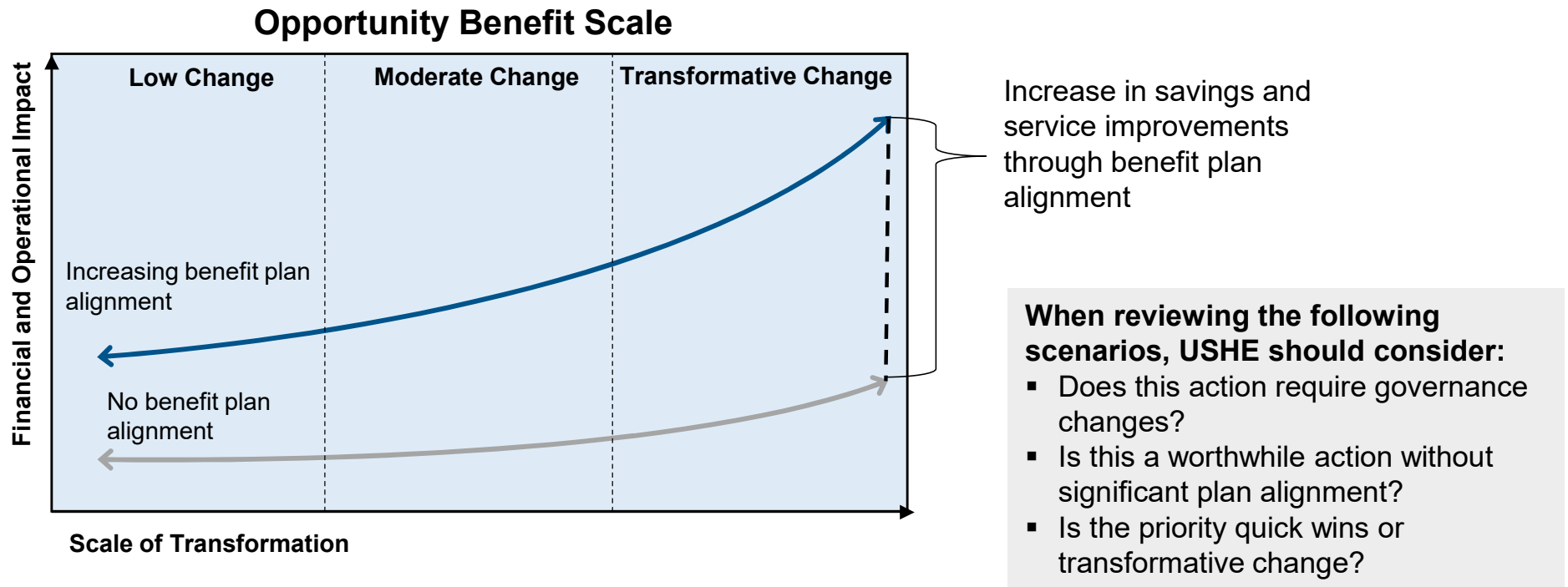
Areas of Interest

- Retirement plan alignment
- Customer service
- Plan design support
- Supplemental benefit alignment
- Collective RFP's and brokers
- Sustainable, long-term governance

“We like our benefits, and it would be unpopular to get everyone on the same plan. There may be opportunity to use USHE’s scale with supplementary benefits.”

Scenario Framework

The value from each scenario for benefit administration opportunities is dependent on the level of plan alignment across the System. Without alignment, financial and operational impacts may be minimal.



Scenario 1: CoE Design and Administration

Establishing a center of expertise that supports benefit plan design and administration for the institutions would increase each institution's ability to make optimal choices on plan selection.

CoE Description

- Provide **expertise** related to benefits for institutions
- Interface with benefit providers, acting as **SMEs** for the institutions
- Receive strategic goals from USHE and **perform analysis** to support the development of strategic plans related to benefits

Roles and Responsibilities

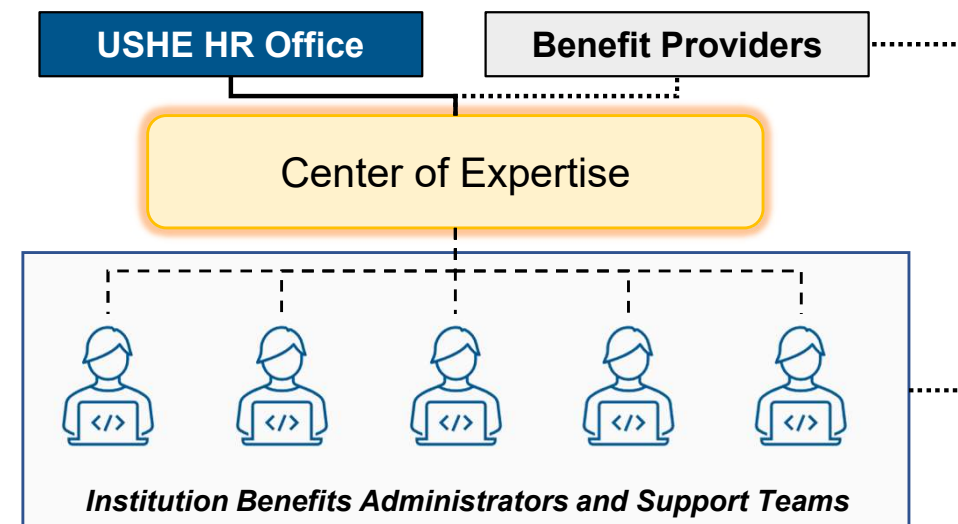
USHE HR: Oversees the center of expertise, establishes goals

Center of Expertise: Serve as central strategic support hub

Inst. Benefits Administer: Direct support inquiries to CoE

Benefit Providers: Interface with institutions and CoE

CoE Organizational Structure



Scenario 2: T1 Call Support Center

Creating a call support center to manage employee questions on benefits could reduce the \$1.2M currently spent on benefits administration.

Call Support Center Description

- Center receives and **answers general benefits related questions**, routing more complex questions to the CoE
- Center **staffing is highly dependent on if there is process, policy, and plan alignment**; without alignment center staffing costs may exceed current expenditure

Roles and Responsibilities

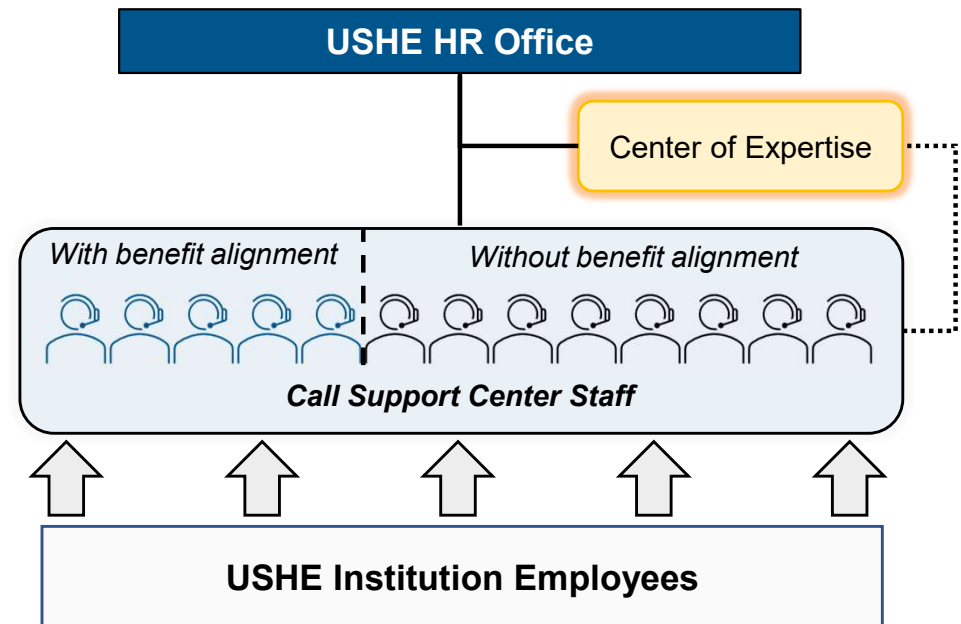
USHE HR: Oversees the center of expertise

Call Support Center Staff: Receive, answer, and route inquiries

Center of Expertise: Support more complex questions

USHE Institution Employees: Direct questions to the support center

Support Center Organization Structure



Scenario 3: Benefit Plan Alignment and Admin Support

Working as a collective entity would increase bargaining power for reduced costs when entering into benefits agreement, eliminate redundant administration, and improve benefit offerings for employees.

Benefit Plan Alignment Overview

- Aligning on benefit plans and providing the administration as a shared service is a **cost saving** opportunity
- USHE would need to **change its governance structure** in order to administer shared benefits
 - Opportunities under current governance are **limited to group RFPs, assessing broker options**, and other small in scale options
- As new employees can no longer participate in the URS pension program, **USHE should consider streamlining institutional retirement plans**
- **PEHP**, the Utah health and benefits provider, offers services that **cover most major benefit areas**
 - PEHP is fully funded, which may drive higher costs at the institutional level

Selecting Shared Benefits

Alignment Implementation Difficulty

➔	
Supplementary & Moderate	Transformative
<ul style="list-style-type: none"> ▪ Childcare ▪ Vision ▪ Life insurance ▪ ADD insurance ▪ Disability (short- and long-term) 	<ul style="list-style-type: none"> ▪ Medical benefits ▪ Prescription drug coverage ▪ Dental insurance ▪ Retirement plans
<p>Supplementary benefits are easier to achieve with often smaller benefits, fiscally and operationally. USHE should target areas of alignment based on actuarial analysis and work with institutions to transition them to a shared service offering.</p>	

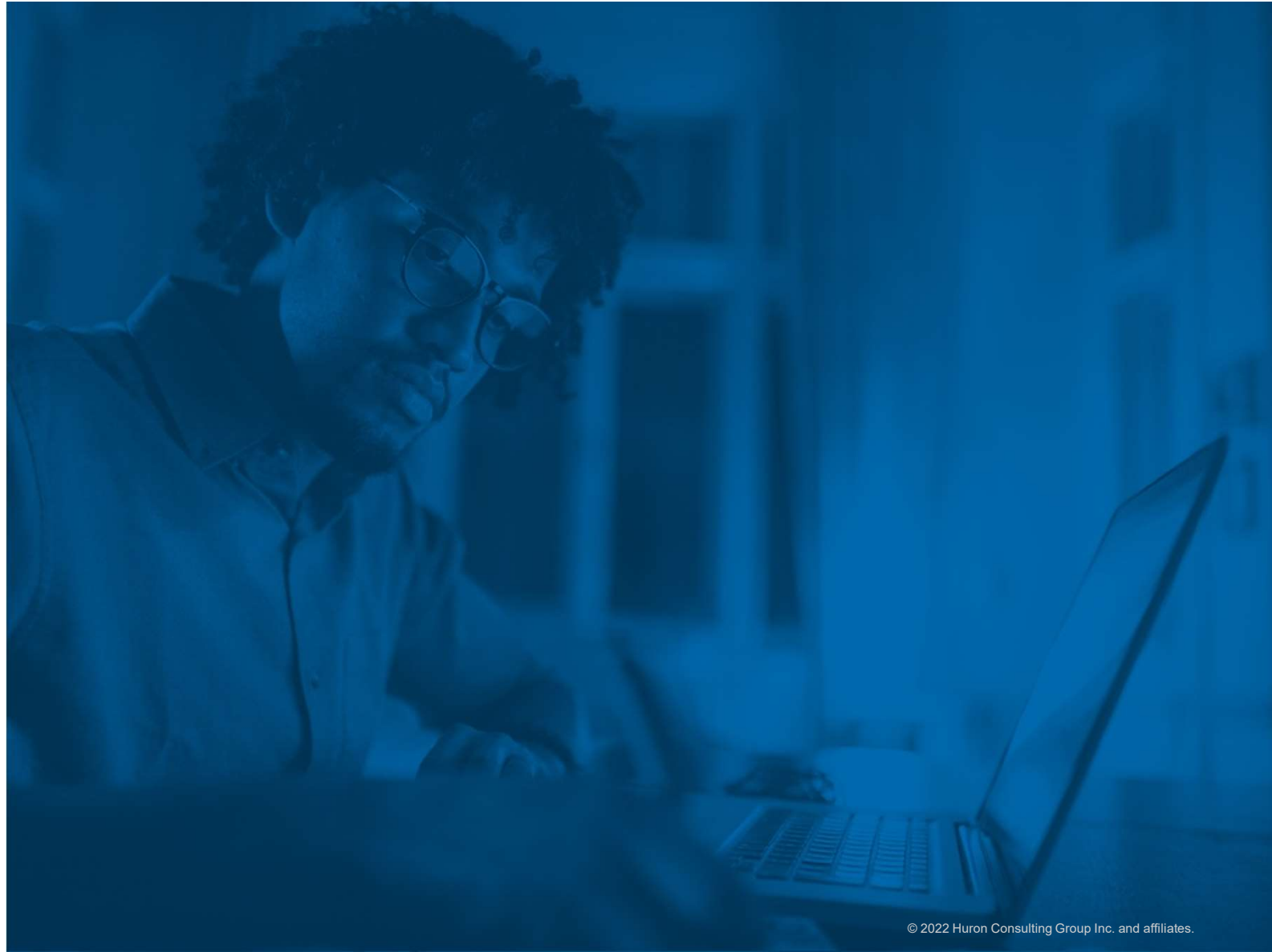
Shared Benefits Next Steps and Risk Management

Key next steps are deciding the goals for USHE benefits changes and performing or hiring a service to conduct an actuarial analysis.

Phase	Benefits Assessment	Future State Design	Implementation
Timeline	Months 0 - 4	Months 4 - 10	Months 10 - 22
Key Activities	<ul style="list-style-type: none"> Conduct actuarial analysis on benefit alignment Identify specific benefit elements for transition to USHE Set change goals and discuss analysis outputs with institutions 	<ul style="list-style-type: none"> Finalize which benefits are being transitioned Forecast administration support staffing needs and perform org design Perform process mapping 	<ul style="list-style-type: none"> Hire and onboard System benefits team Work with providers to discuss any changes in processes or coverages Communicate change plan to institutions Make governance changes as needed
Key Risks	<p>Governance: The current governance structure limits USHE's ability to effectively administer and provide shared benefits</p> <p>Change management: Institutions may want to retain control over their benefit plans and building consensus is key to successful change</p> <p>Process and policy alignment: Processes and policies need to be consolidated and streamlined to the fullest extent possible to optimize efficiencies</p>		

8

Employment Law

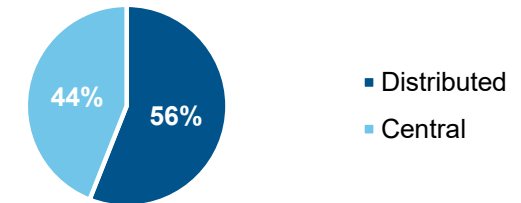


Overview of Opportunity

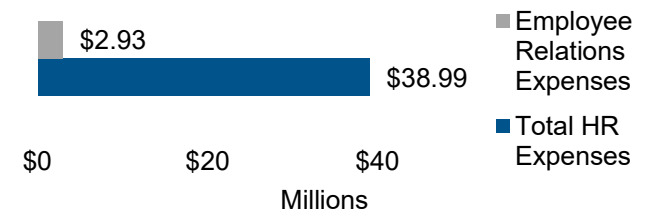
USHE can improve service delivery and ensure employment law compliance by creating a center of expertise to support employee relations efforts.

- USHE dedicates **25.8 FTE** and invests **\$2.93M** in employee relations activity
- The majority of employee relations activity is distributed, which points to **unstandardized policies and practices**
 - Currently, there are separate employment law policies amongst the degree-granting institutions and the technical colleges¹
- Conversations with stakeholders revealed that there is **a lack of systemwide resources** for employee relations, which has led to **compliance risks and issues**
- Developing a center of expertise to act as an external resource for employee relations will provide institutions with the necessary support to ensure **employment law compliance** across the System

Employee Relations Distribution



Employee Relations to Total HR Expenses



The following slides provide an overview of employee relations, current USHE standings, industry best practices, and modeling of potential future state scenarios.

Source: [1USHE website](#)

Employment Law Overview

Employment law regulates the relationship, responsibilities, and rights amongst employers and employees and is a key component of employee relations.

The following terms are essential when considering employment law and the role it plays in employee relations:

- **Employment contract:** A formal agreement between two parties that outlines the terms and conditions of employment to which the parties agree
- **Employee protection:** Whistleblower protections for employees who report violations of the law by their employers, including any sort of harassment, are mandated in the workplace
- **Wages and hours:** There are standards in place that outline the requirements for what employers must pay for wages and overtime pay
- **Workplace safety and health:** Employers have a duty to provide their employees with work and a workplace free from recognized, serious hazards
- **Employee benefit security:** There are regulations in place for employers who offer pension or welfare benefit plans for their employees
- **Legal counsel:** Institutions will often have an office or individual who provides legal services and advice regarding the institution's legal matters

Importance of Employment Law

Failing to stay within compliance for employment law can lead to serious monetary and legal risks that can impact an institution's overall wellbeing.

Employment Law Risks



Civil Lawsuit: Employees and former employees can file a lawsuit if they think an organization is out of compliance



Audit: Suspicion about non-compliance can lead employees to file a claim with the government that will trigger an audit



Fines: Violations of employment laws, including wages, discrimination, and federally mandated leave can lead to expensive fines

Potential Consequences



Financial Costs: Breaking employment laws can cost institutions millions of dollars from legal fees, fines, and compensatory damages



Time: Determining the appropriate solution for an employment law violation can be time-consuming; on average a civil lawsuit takes around 318 days



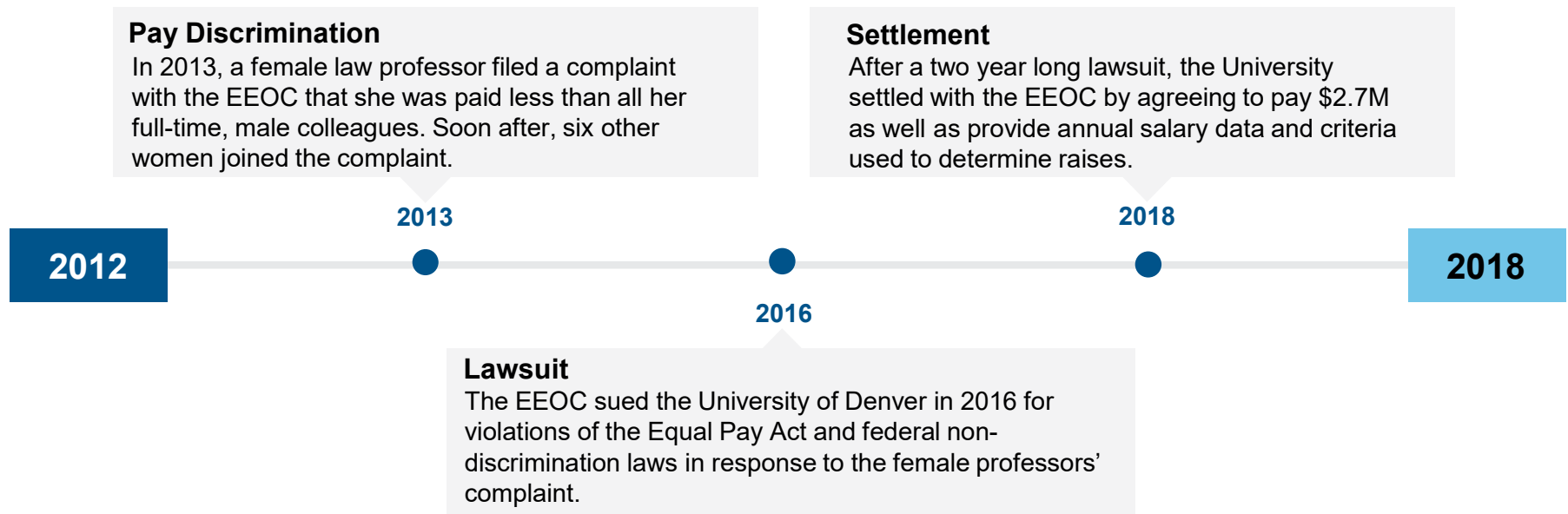
Capacity: Solving employment law violations requires institutions to provide appropriate resources, which can lead to a decrease in capacity



Reputation: A history of non-compliance projects an image that employee relations is not taken seriously, which impacts employee recruitment and retention

Case Study: University of Denver

The University of Denver was sued by the U.S. Equal Employment Opportunity Commission for gender-based pay discrimination, which cost the institution \$2.7M.



In failing to abide by anti-discrimination laws, the University of Denver not only allowed a discriminatory institutional culture, but also wasted expensive time and monetary resources.

USHE Employee Relations Support

Currently, USHE is providing little support to employee relations, with many of the institutions dedicating less than 1 FTE to the area.

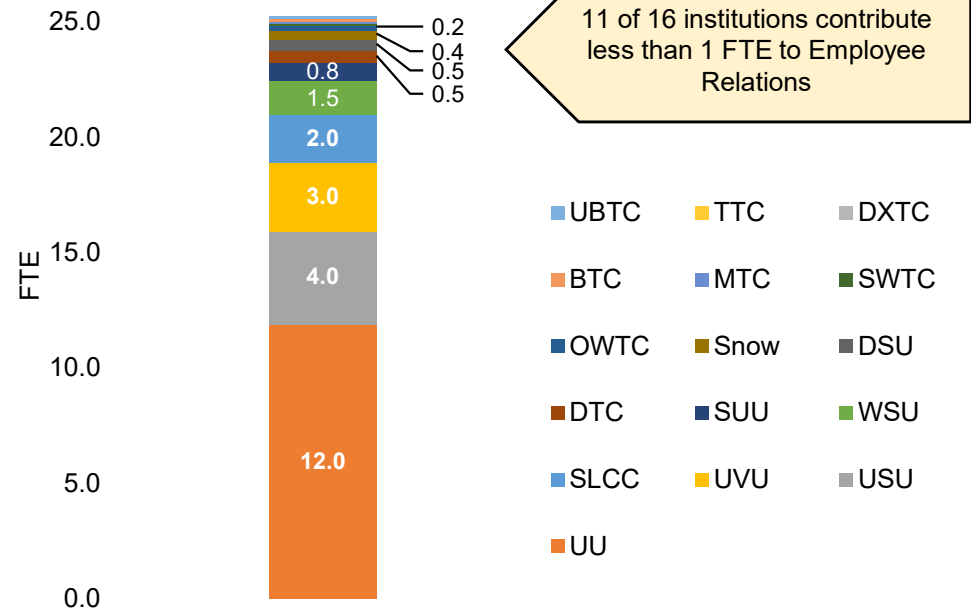
Stakeholder Input

“We do what we can to stay in compliance, but we don’t have anyone dedicated to employee relations.”

“We just don’t have enough people to deal with employee-related relations.”

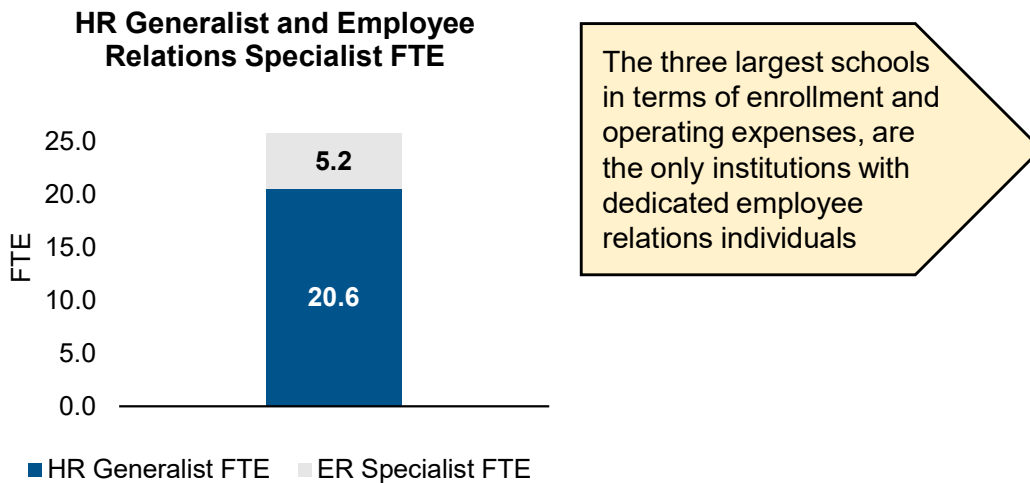
Stakeholder input and HAAS data shows that USHE lacks adequate employee relations support. This can lead to potential acts of non-compliance with financial and cultural consequences.

Employee Relations FTE by Institution



USHE Employee Relations Expertise

The majority of USHE institutions rely on HR generalists for employee relations work, which depicts expertise and resource gaps across the System.



Institution Name	HR Generalist FTE	Employee Relations Specialist FTE
UU	9.0	3.3
USU	3.3	0.9
UVU	2.2	1
SLCC	1.9	0
WSU	1.5	0
SUU	0.8	0
DSU	0.5	0
Snow	0.4	0
DTC	0.5	0
OWTC	0.2	0
MTC	0.1	0
BTC	0.1	0
UBTC	0.0	0
DXTC	0.1	0
SWTC	0.1	0
TTC	0.0	0

Without adequate and dedicated resources for employee relations activity, institutions risk employment law non-compliance due to a lack of proper oversight and support.

Note: Employee Relations Specialists determined if individual spends more than 0.75 FTE in the area

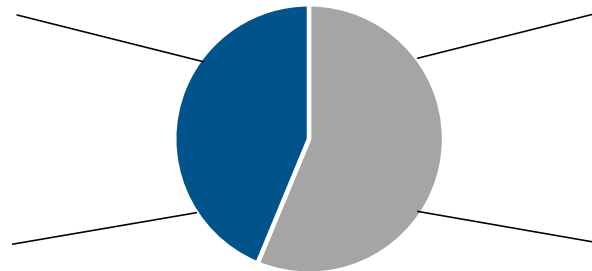
USHE Legal Counsel

USHE policy states that each institution may have an office of legal counsel as a precautionary measure for legal matters, yet the majority of institutions do not have such an office.

“...the President of each institution with the approval of the institution’s Board of Trustees may create an office of legal counsel to provide legal advice to the institution’s administration and to coordinate legal affairs within the institution.” Policy R135¹

Institutional Legal Counsel Overview

UU	USU	UVU
WSU	DSU	SLCC
		SUU



Snow	DXTC	OWTC
DTC	SWTC	MTC
BTC	TTC	UBTC







■ With Legal Counsel ■ Without Legal Counsel

The institutions that do not have in-house legal counsel put themselves at risk for costly and time-consuming solutions to employment law violations.

Source: ¹<https://ushe.edu/ushe-policies/policyr135/>
 Note: Legal counsel data from institutional census data

Examples in Higher Education

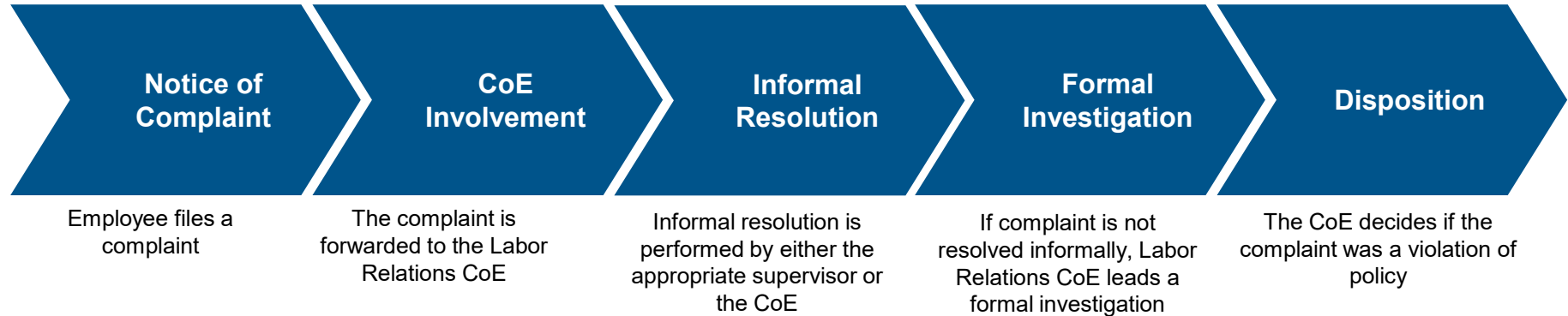
Multiple institutions and state systems have implemented a more focused employee relations service line to mitigate risk, ensure compliance, and avoid potential costs.

Seal	Institution Name	Services Description
	University of Chicago	Employee Relations partners with unit-level HR to provide guidance in policy, contract administration, employment law compliance, and more.
	University System of Wisconsin	The System implemented a center of expertise that provides HR leadership, policy development, guidance, and functional expertise across the UW System.
	The Pennsylvania State University	A shared service center supports campus HR Business Partners in risk assessment, policy interpretation, investigation support, and liaison to counsel.
	Connecticut State Colleges and Universities	CSCU developed a center of excellence centered on labor relations including grievances, investigations, policies, and compliance.
	Ohio State University	A service center was developed at each campus which provides support for inquiries related to employee relations.
	University System of Georgia	The shared services center partners with the University System Office and USG institutions to operationalize policy, compliance, and legislation.

Connecticut State Colleges and Universities CoE



CSCU provides best practice labor relations support through a center of excellence that oversees internal relations, such as investigations. The investigation process is illustrated below.



Roles	Responsibilities
<p>The CCSU Center of Excellence is comprised of five individuals that hold 3 distinct positions:</p> <ul style="list-style-type: none"> ▪ Director of Labor Relations ▪ Labor Relations Associate ▪ Labor Relations Regional Investigator (3 total for each region) 	<ul style="list-style-type: none"> ▪ Guidance and direction on employee relationships ▪ Ensure compliance with bargaining agreements ▪ Workplace Investigations ▪ Developing and enforcing workplace policies and procedures ▪ Conflict solutions ▪ Grievance resolution

Source: <https://www.ct.edu/hr/labor-rel>

Pennsylvania State University Shared Services

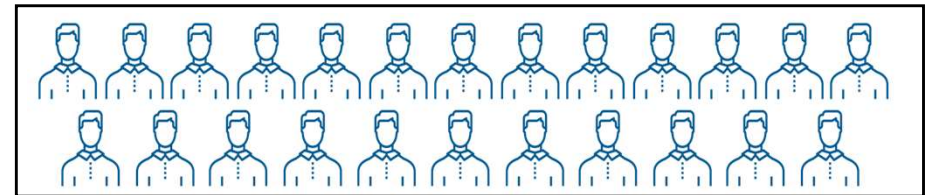


Penn State University is another example of an employee relations best practice. Their model has HR business partners within each campus that lean on shared services for employee relations support.

Model Overview

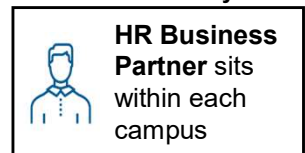
- All 24 campuses within Penn State have a **HR Business Partner** who works to identify and triage employee-related issues
- The Labor and Employee Relations Shared Service Center provides support in:
 - **Risk assessment**
 - **Policy interpretation**
 - **Investigation Support**
 - **Liaison to counsel**
- This operating model is dependent on a **unified set of policies** and a **defined role/point of contact** for each campus

Illustrative Model



Labor & Employee
Relations Shared Service
Center

Model Key

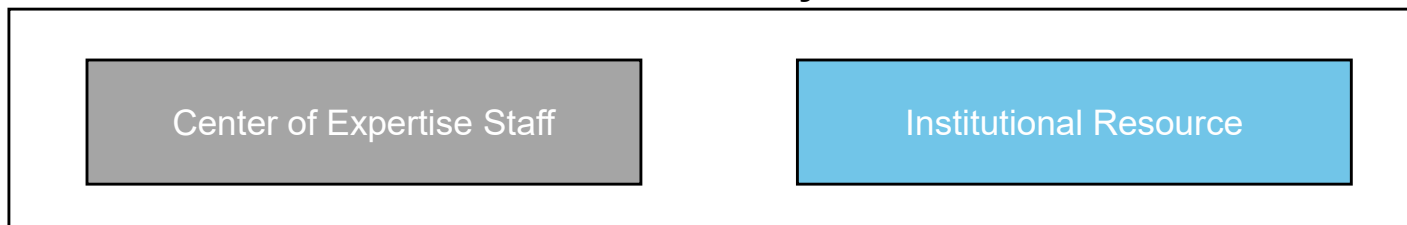


Source: <https://hr.psu.edu/employee-relations>

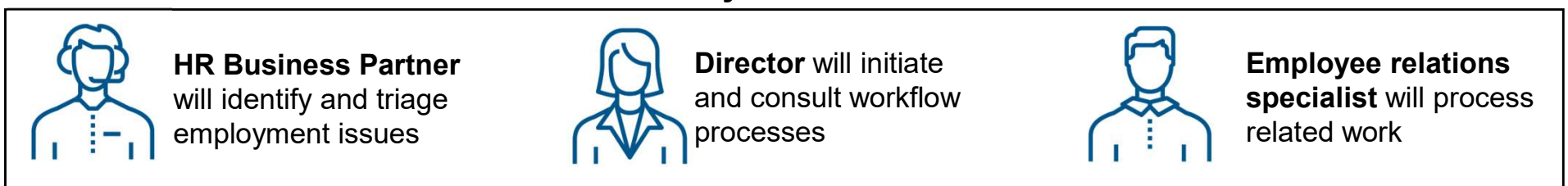
Scenario Overview

The following two scenarios are coupled with illustrative models that depict the organizational design to be considered. Outlined below are keys that will be useful for understanding the models.

Model Key



Key Positions



Scenario 1: USHE Center of Expertise

The first future state scenario entails developing a central center of expertise that will act as a systemwide resource to support institutional HR leadership in employee relations matters.

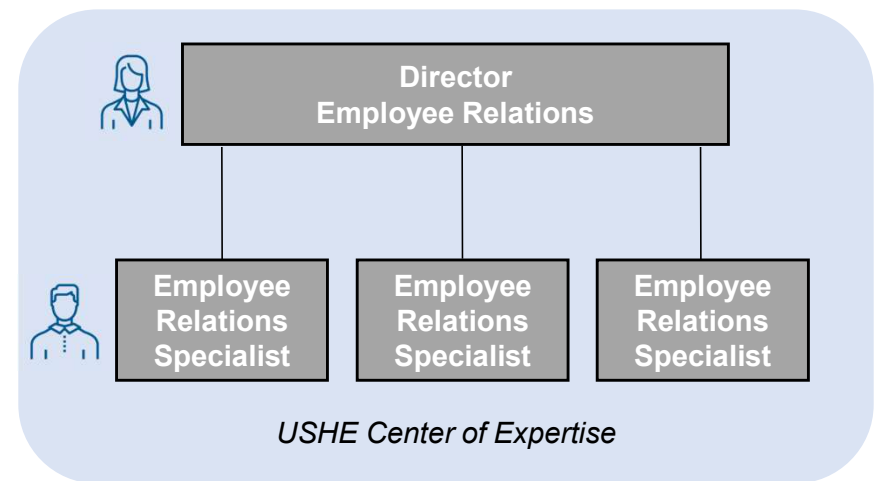
Scenario Overview

- Many USHE institutions do not have dedicated employee relations support. Implementing a systemwide center of expertise will **close resource gaps**, create **consistent policies and procedures**, and increase overall **employment law compliance**.
- The center of expertise will include:
 - One director who oversees and consults employee-related processes
 - Three employee relations specialists who process and support the required work, including **risk assessment, policy guidance, investigations, and communications with counsel**

Scenario 1	CoE Staff	Institutional Staff	Total
FTE	4.0	-	4.0
Expenses¹	\$260K	-	\$260K

Source: ¹Salaries averaged across the industry on HigherEdJobs
 Note: Staffing models based off of peer best practices

Illustrative Model



Scenario 2: HR Business Partners & CoE

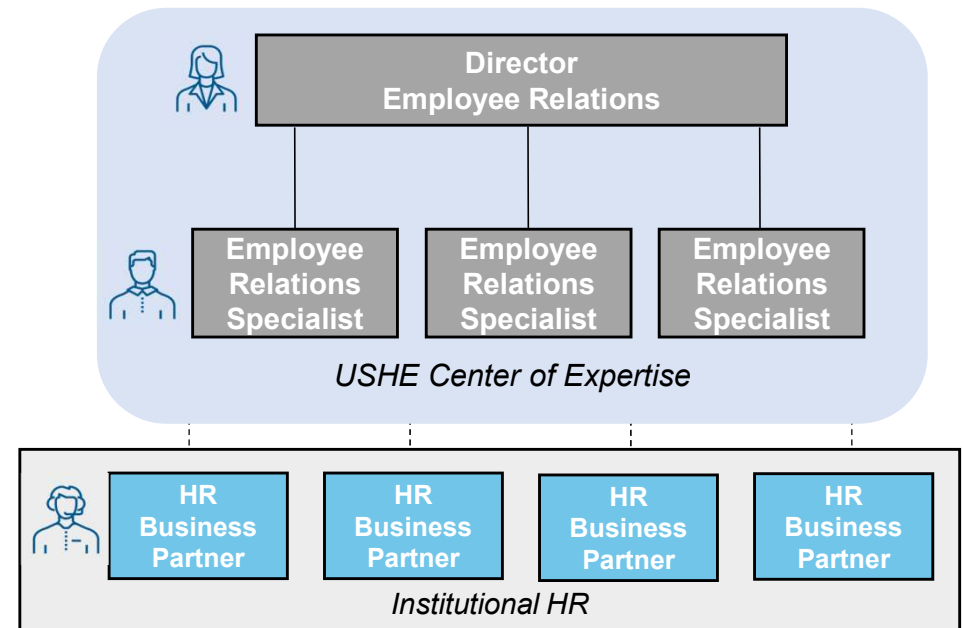
The second future state scenario involves implementing HR Business Partners that sit within the institutions in order to identify employment related issues and relay them to the center of expertise.

Scenario Overview

- This organizational model assists in developing relationships between institutions and the center of expertise, which will ensure that all employment related issues are properly **identified and resolved**.
- Along with the center of expertise, this scenario includes **four HR Business Partners** (“HRBP”):
 - The HRBPs will act as an institution’s **main point of contact** for employee relations related matters
 - HRBPs can be distributed across the System based on **institutional size, institutional type, or geographic location**

Scenario 1	CoE Staff	Institutional Staff	Total
FTE	4.0	4.0	8.0
Expenses¹	\$260K	\$360K	\$620K

Illustrative Model



Source: ¹Salaries averaged across the industry on HigherEdJobs
 Note: Staffing models based off of peer best practices

Summary: Future State Scenarios

These future state scenarios represent options that USHE can move forward with as a means of increasing employment law compliance and supporting institutional employee relations efforts.

Scenarios	Cost	Benefits	Limitations
Scenario 1	\$260K	<ul style="list-style-type: none"> ▪ Little disruption to current operations due to optionality ▪ Relatively inexpensive resource 	<ul style="list-style-type: none"> ▪ Lack of relationship development between CoE and institutions ▪ Little institutional oversight can lead to possible non-compliance
Scenario 2	\$620K	<ul style="list-style-type: none"> ▪ HRBPs develop relationship between institutions and CoE ▪ Assurance of consistent practices due to institutional oversight 	<ul style="list-style-type: none"> ▪ Size of system means that HRBPs will be overseeing multiple institutions ▪ Requires further stakeholder investment and effort to implement

Both scenarios will result in net savings due to cost avoidance related to potential litigious risks.

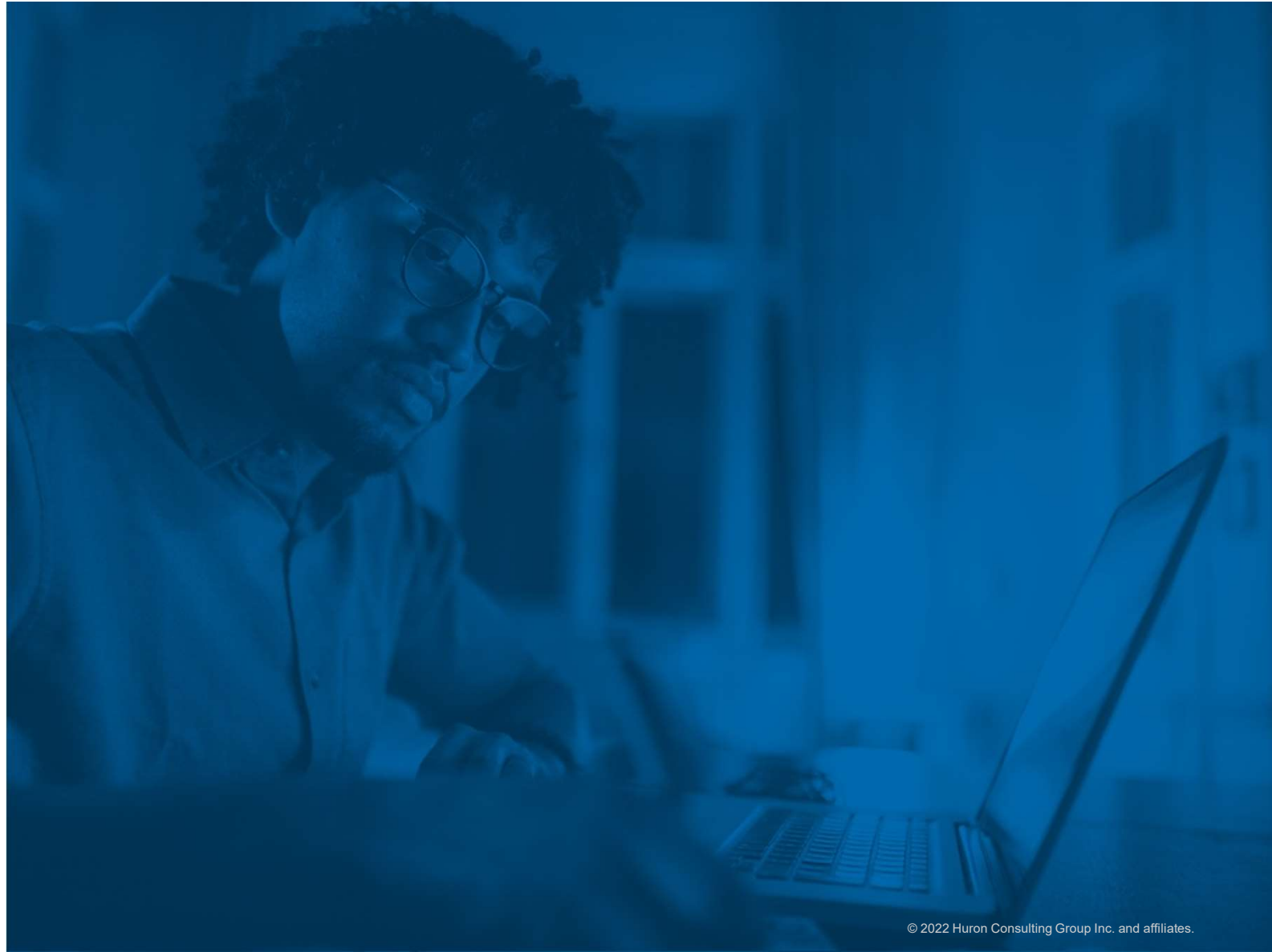
Employment Law Next Steps and Risk Management

Key next steps are establishing a more detailed understanding of tools and vision, assessing current policy and process alignment, and evaluating staffing approaches.

Phase	PLANNING	DESIGN	IMPLEMENTATION
Timeline	Months 0 - 4	Months 4 - 8	Months 8 - 12
Key Activities	<ul style="list-style-type: none"> Identify current technologies and platforms to support collaborative case management Evaluate case volume and need, by campus Develop vision and charter for proposed center of expertise 	<ul style="list-style-type: none"> Design organizational structure and establish reporting lines (potentially dual) Develop institution portfolios for distinct business partners (ex: regional) Redesign escalation pathways to route through CoE 	<ul style="list-style-type: none"> Hire and onboard center staff, inclusive of contracted resources if applicable Develop and socialize training material, including institutional 'road shows' Update policies and procedures to align with new structure
Key Risks	<p>Policy Alignment: The Center's ability to successfully drive will be dependent on how standardized and consistent policies are applied.</p> <p>Technological Consistency: A sophisticated center of expertise will leverage case management software to track and route appropriate cases, which may require alignment across multiple institutions.</p> <p>Governance: A systemwide center will need to navigate issues of ownership and accountability across USHE.</p>		

9

Talent Acquisition



Overview of Opportunity

USHE can improve talent acquisition with integrated business processes that facilitate retention and provide data for employee acquisition needs.

- USHE spends **\$4.94M** on talent acquisition services and dedicates **50.7 FTE** to the area
- Current talent management efforts are **highly distributed** with **68%** of activity occurring outside of the central unit
 - Fragmented activity can result in a lack of **strategic** talent acquisition and overall cohesion of recruitment efforts
- USHE does not have a resource or mechanism that allows the institutions to collaborate on talent acquisition efforts, which has led to a **loss of employees** from the System
 - Between the years 2019 and 2020, USHE lost almost **700 employees**
- Implementing a centralized model to support talent acquisition will combat industry trends through more **strategic employee recruitment and retainment efforts**

The following slides provide an overview of talent acquisition, current USHE standings, industry best practices, and modeling of potential future state scenarios.

Talent Acquisition Services

Talent acquisition focuses on employee recruitment and retention. The key performance indicators and questions listed below emphasize fundamental elements of talent management services.

Key Performance Indicators

- Time-to-hire
- Cost of filling the position
- Acceptance rate
- New employee retention rate
- New employee performance level
- Hiring manager's satisfaction with the recruitment process
- Applicants' perception of the recruitment process

Strategy Development Questions

- *What type of individuals should be targeted?*
- *What recruitment message should be communicated?*
- *How can the targeted individuals best be reached?*
- *When should the recruitment campaign begin?*
- *How can we best retain our current employees?*

Talent Acquisition Risks

Industry benchmarks have shown that the following categories are perceived as the top risks related to talent management.



CAPABILITY

Risks associated with building the skills an institution needs to stay competitive within the growing market



COST

Risks related to the financial cost of recruiting and retaining the people that an institution requires



COMPLIANCE

Risks that revolve around ensuring that talent processes and management comply with local laws and regulations



CAPACITY

Risks relating to career progression and the ability to retain essential people and teams within an institution

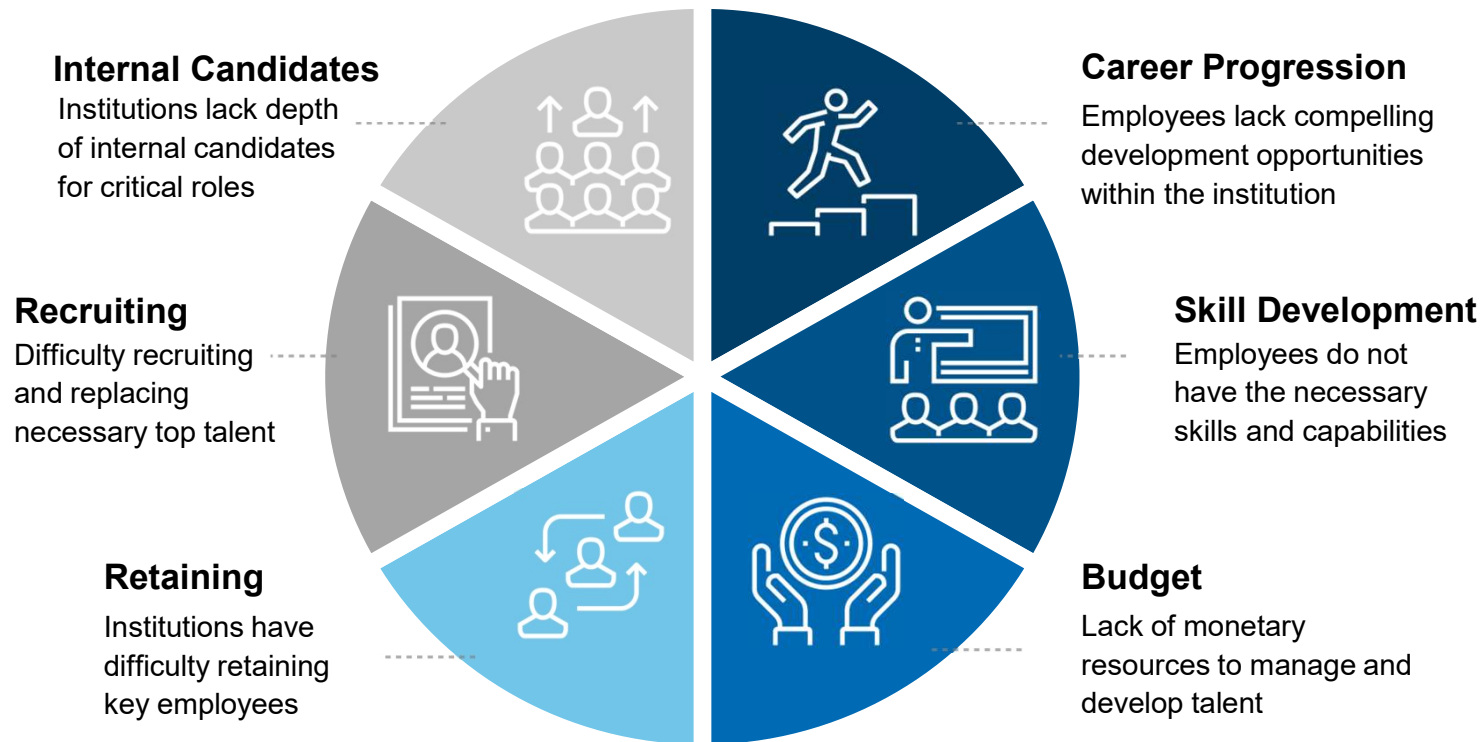


CONNECTION

Risks that come with employees, particularly those in critical roles, becoming disengaged in their work

Risk Exposure Consequences

Inadequate talent management can result in an underdeveloped and unproductive workforce, which creates inefficiencies throughout an institution and puts it at a disadvantage within the market.



Risk Avoidance Strategies

To combat the risks related to talent management, higher education institutions have increased their talent acquisition focus on key areas in order to attract and retain talent.



Technology

Recruiting processes have been moved to a virtual environment to increase cost and time savings as well as bring clarity to talent data



Remote Recruiting

Institutions have looked to hire across geographic borders as a way to increase the applicable talent pool



Internal Talent

Industries have increased their learning and development budgets as a means to focus on internal hiring



Diversity, Equity & Inclusion

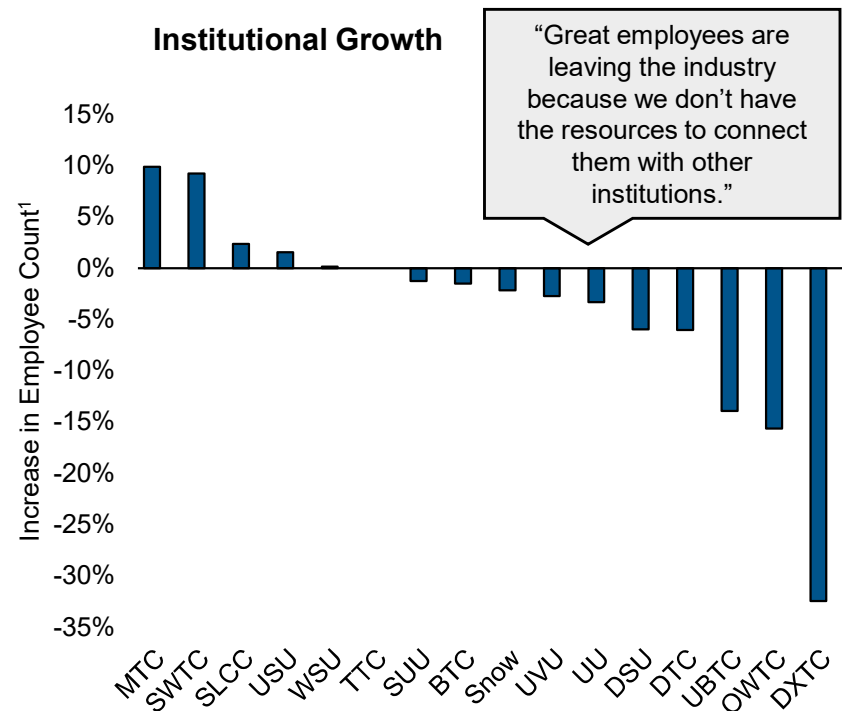
Candidates have emphasized the importance of DE&I commitments to focus on institutional culture and reputation

USHE Talent Acquisition Overview

USHE trends depict a systemwide loss of employees and unpredictable future trends emphasize the need for strategic talent management services.

- Conversations with stakeholders as well as quantitative data show that USHE has been impacted by the **industry trends of a waning workforce**
 - The majority of institutions have seen a **decrease in their employee count** from the years 2019-2020
 - Stakeholders noted that the System **lacks shared resources** for necessary talent management collaboration

On average, it costs an organization 6-9 months of an employee's salary to replace them¹. To avoid such expenses, systemwide talent acquisition services need to have a consistent and well-developed strategy.



Source: ¹SHRM

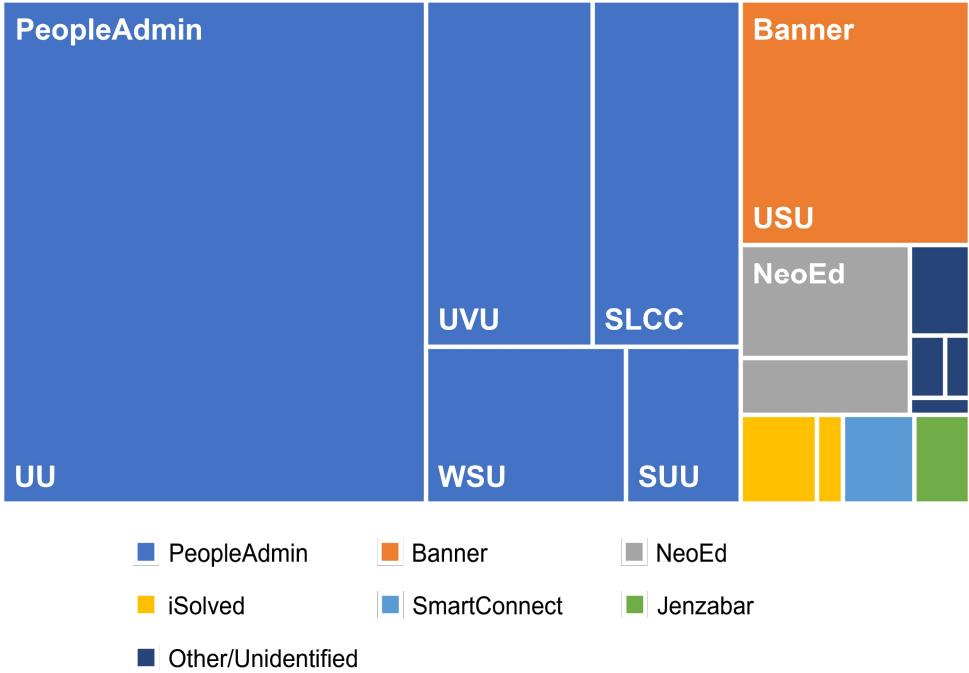
USHE Applicant Tracking Systems

Across USHE, institutions use a variety of application tracking systems which has led to difficulties in systemwide collaboration and recruitment efforts.

- Application tracking systems (“ATS”) across the System are inconsistent, with some institutions having **multiple systems** and others **not having a system** altogether
 - Conversations with stakeholders revealed that inconsistent and multiple applicant tracking systems has led to **manual and inefficient processes** for talent management practices

Without a common application tracking system, institutions struggle to obtain consistent talent acquisition data, which decreases systemwide collaboration.

Institutional Applicant Tracking Systems¹



Source: ¹ATS inventory taken from institutional data received through the Study data request
 Note: Size of leaf represents how many employees are in each institution.

Case Study: UU Response to Industry Trends

Institutions within USHE have developed programs to combat the workforce trends within higher education. These programs target workplace flexibility as a means to attract and retain employees.

- **Overview:** UU has launched a pilot program focused on telecommuting called Work Reimagined. The program is set to run for 24 months during which it will be monitored for potential modifications
- **Rationale:** UU decided to run this program as a way to increase employee retention, improve employee job satisfaction, and attract new, remote employees
- **Prerequisites:** Each position is analyzed to determine whether job duties could be performed remotely. Employees that are telecommuting must uphold expectations, customer service, and responsiveness



In developing a program that focuses on remote-work, UU can expand their geographic reach with the potential to better adapt to current employee needs, increase diversity, and attract new talent.

Source: <https://workreimagined.utah.edu/>

Case Study: USU Response to Industry Trends

Utah State University has developed a program targeting employees in varying geographic areas through the offering of courses centered on remote employment.

- The Rural Online Initiative (“ROI”) is a program that aims to provide Utah’s rural workforce with **education, training, and services** for remote employment
 - USU Extension has developed the program, demonstrating its **commitment to remote work**
 - ROI aims to **empower rural communities** and in turn increase the number of capable remote workers.
- After its start in 2018, the Utah State Legislature has removed the sunset of ROI, which depicts its success and the **future of remote work**









Programs that focus on future workforce trends, such as remote work, increase the diversity of potential candidates and emphasize the importance of flexibility in talent management.

Source: https://extension.usu.edu/news_sections/impacts/roi

Examples in Higher Education

Institutions and state systems have implemented various talent acquisition services to support the recruitment and retainment of employees.

Seal	Institution Name	Services Description
	California Community Colleges	The CCC has a user-friendly common registry that acts as a large-scale database for individuals seeking a job at one of the colleges.
	University of Oregon	The University established a single central website for job openings throughout neighboring institutions for applicants looking for employment in a certain area.
	University System of Wisconsin	System HR has a search and screen committee that analyzes the talent pool and conducts phone interviews to support the assemblage of qualified candidates.
	Connecticut State Colleges and Universities	CSCU developed a center of expertise made up of five employees that supports recruitment processes to align talent initiatives to DE&I and strategic goals.
	Princeton University	Princeton implemented an ATS that includes search capabilities for employers, as well as a talent network that allows candidates to get job updates.
	University of Chicago	The University has a center of expertise that coordinates and supports workforce planning, strategic sourcing, talent pool assessment, and selection.

Scenario 1: Common Application Tracking System

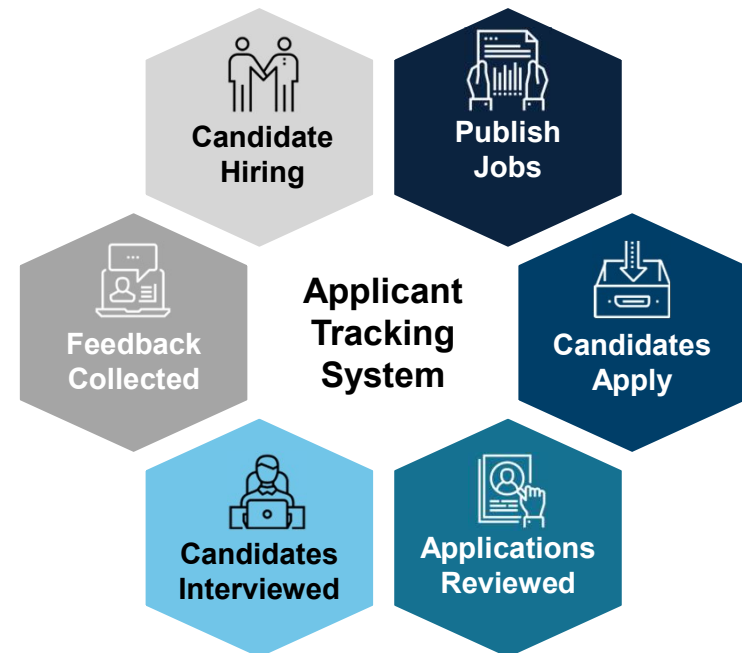
The first future state scenario entails implementing a common application tracking system across USHE that is easy to navigate for candidates and institutional recruitment staff.

Scenario Overview

- Currently, USHE lacks a shared common recruitment resource. A common application tracking system will produce **consistent recruitment data**, which will increase **collaboration** and **communication** across USHE institutions
 - Consistent recruitment data will allow institutions to better **track applicant trends**
 - Applicants will be able to view and apply for jobs across the System which helps to **decrease geographic restrictions**

Scenario 1	Applicant Tracking System
Expenses ¹	\$25K-\$150K

Applicant Tracking System Services



Note: ¹Expenses represent a mixed estimate range based on recurring annual fees and varying potential ATS pricing models. This estimate does not include the one-time implementation fee.

Scenario 2: Tier 1 Support

The second future state scenario entails implementing tier 1 support along with a common application tracking system to ensure quality service delivery and efficient responsiveness.

Scenario Overview

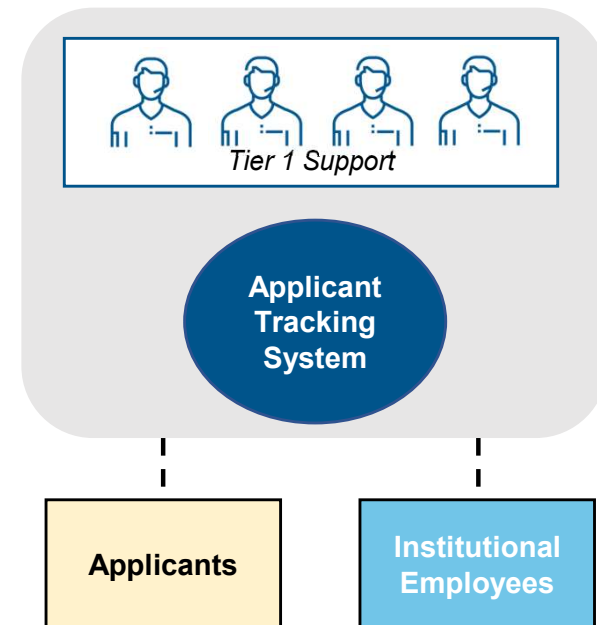
- Combining tier 1 support with a shared application tracking system will enhance the recruitment experience for both **applicants** and **employees**
 - Applicants will have a **defined point of contact** that they can reach out to with questions related to the functionality of the applicant tracking system
 - Employees can rely on tier 1 support for applicant tracking system-related inquiries such as, **job posting, candidate feedback, and recruitment data collection**

Scenario 2	ATS	Tier 1 Staff	Total
FTE	-	4.0	4.0
Expenses ¹	\$88K	\$160K	\$248K

Source: ¹HigherEd Jobs

Note(s): Tier 1 staffing based off of industry best practices and internal benchmarks; Average of pricing range used for ATS cost analysis

Illustrative Model



Scenario 3: Talent Acquisition Center of Expertise

The third future state scenario entails implementing a fully functioning center of expertise that oversees and consults on all talent acquisition matters for the System.

Scenario Overview		Illustrative Model	
<ul style="list-style-type: none"> The center of expertise oversees, processes, and supports all talent acquisition practices and procedures, including: <ul style="list-style-type: none"> Workforce planning: Proactively identify talent needs and build candidate pipeline Strategic sourcing: Offer targeted hiring support Talent pool assessment: Leverage critical selection factors for candidate evaluation Successful selection: Create a well-supported candidate experience 		<p style="text-align: center;"><i>USHE Center of Expertise</i></p>	
		<p style="text-align: center;">Applicant Tracking System</p>	

Scenario 3	ATS	Center of Expertise Staff	Total
FTE	-	5.0	4.0
Expenses¹	\$88K	\$253K	\$341K

Source: ¹HigherEd Jobs

Note(s): Center of Expertise staffing based off of industry best practices and internal benchmarks; Average of pricing range used for ATS cost analysis

Summary: Future State Scenarios

The presented scenarios represent opportunities for USHE to improve their talent acquisition strategies through more focused employee recruitment and retainment.

Scenarios	Cost	Benefits	Limitations
Scenario 1	\$88K	<ul style="list-style-type: none"> Consistent systemwide recruitment data Increase in accurate metrics for diversity, equity, and inclusion efforts 	<ul style="list-style-type: none"> Varying recruitment processes within the institutions will make initial implementation difficult
Scenario 2	\$248K	<ul style="list-style-type: none"> Enhanced candidate experience Extra support will increase employee understanding of the tool's capabilities 	<ul style="list-style-type: none"> Lack of strategic recruitment and retainment processes Little to no systemwide collaboration
Scenario 3	\$341K	<ul style="list-style-type: none"> Strategic recruitment processes will keep USHE competitive within the market Increased capacity for institutional employees 	<ul style="list-style-type: none"> Varying school missions requires multiple methods of strategic recruitment Decrease in institutional control

These scenarios will increase net savings through cost avoidance related to employment, including a decrease in systemwide employee turnover and replacement costs.

Note: Average of pricing range used for ATS cost analysis

Talent & Acquisition Next Steps and Risk Management

Key next steps are establishing technological integration across USHE systems, engaging key recruitment stakeholders, and evaluating vendors.

Phase	PLANNING	DESIGN	IMPLEMENTATION
Timeline	Months 0 - 3	Months 3 - 6	Months 6 - 12
Key Activities	<ul style="list-style-type: none"> Inventory and evaluate technological requirements to bridge USHE systems Develop an RFX and solicit vendor bids for ATS (as appropriate). Engage recruitment leads in visioning and goal development 	<ul style="list-style-type: none"> Review vendor quotes and identify desired partner Begin ATS integration and design process Begin staffing and onboarding process for CoE Director 	<ul style="list-style-type: none"> Implement ATS system and engage with core stakeholders Begin staffing and onboarding process for CoE Specialists Publicize revised processes and policies and drive adoption
Key Risks	<p>Technological Consistency: USHE has a wide range of ATS platforms, and it will require a significant effort to drive change towards a more standardized experience.</p> <p>Culture: Collaboration and information sharing around requirement is often a sensitive topic and will be an obstacle in implementation.</p> <p>Process Redesign: Recruitment is decentralized in some institutions and significant process redesign is necessary to integrate the new CoE</p>		



 **HURON**



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

Revised
TAB M

September 16, 2022

Mountainland Technical College – Acquisition of Property

Board Policy R703, *Acquisition of Real Property*, requires the institutions of Higher Education to seek Board approval for real property acquisitions that commit institutional funds in excess of \$1.5 million. Mountainland Technical College (MTech) is requesting approval from the Board to acquire 8.2 acres of property located in the Wasatch Community in Heber, Utah. The purchase price has been set at \$3 million and would be contingent on the following due diligence items:

- Appraisal
- Title Report and Insurance Commitment

This acquisition is being made to strategically leverage and support the Capital Development Request to construct the first building on the MTech Wasatch Campus.

Mountainland Technical College Board of Trustees approved the acquisition at their August 17, 2022, meeting.

Commissioner's Recommendation

The Commissioner recommends the Board authorize the property acquisition for Mountainland Technical College, as described in the accompanying documents, and forward it to the full Board for final approval.

Attachment



August 25, 2022

Mr. David Woolstenhulme
Commissioner
Utah System of Higher Education, Two Gateway
60 South 400 West
Salt Lake City, Utah 84101-1284

Dear Commissioner Woolstenhulme:

The Mountainland Technical College hereby requests approval from the Board of Higher Education to proceed with closing on the acquisition of 8.2 acres of vacant land in the Wasatch Community in Heber City, Utah. The purchase price has been set at \$3,000,000 and closing would be contingent on the completion of the following due diligence items:

- Appraisal
- Title Report and Insurance Commitment

This acquisition is being made strategically in order to leverage the current financial opportunities represented in the purchase terms and to further the Capital Development Request being submitted by the College. Mountainland Technical College will then continue to develop more in-depth plans once programming is complete to guide the development of the Wasatch Campus. Additional details on this request can be found in the attached information.

The Mountainland Technical College Board of Trustees approved this acquisition during its meeting on August 17, 2022.

Accordingly, I would appreciate an opportunity to present this purchase to the Finance and Facilities Committee at the September 15, 2022 Board of Higher Education meeting.

Thanks for your consideration and support

Sincerely,

A handwritten signature in blue ink, appearing to read 'Kirt Michaelis'.

Kirt Michaelis
Vice President, Administrative Services



MOUNTAINLAND
TECHNICAL COLLEGE



Heber City Land Acquisition
Kirt Michaelis, VP Administrative Services

Purchase Price and Donation

- Mountainland Technical College proposes to purchase 8.2 acres of vacant land for a purchase price of \$3 Million.
 - The purchase will happen in 2 parts
 - The first 2.9 acres of land will be purchased for \$1 Million.
 - The additional 5.3 acres will be purchased using an option that will be available to the College for the next two years.
 - Wasatch County School District will donate an additional 2.5 acres of adjacent land if the 8.2 acres are purchased.
- Total purchase price \$3M
 - Effective rate per acre with donation \$280K



Recommendation

Approval to purchase 8.2 acres of vacant land in Heber City, Utah.

- Contingent on successful completion of due diligence items.





MOUNTAINLAND
TECHNICAL COLLEGE





September 16, 2022

Utah State Board of Education
250 East 500 South
Salt Lake City, UT 84111

Members of the Utah State Board of Education,

Supporting Utah’s growing economy and preparing the workforce of the future will require more Utahns to earn a postsecondary educational credential. In his [One Utah Roadmap](#), Governor Spencer Cox sets the goal of making postsecondary education an expectation for all Utahns.

[Yet only 55% of Utah high school graduates attend any type of postsecondary institution within three years of graduating](#)—a length of time that accounts for high school graduates who serve a religious mission and then enroll. This means nearly half of Utah high school graduates fail to enroll in postsecondary education, among the lowest in the nation. The number one barrier to accessing a postsecondary education is financial—the ability to pay tuition, fees, and living expenses.

Financial aid makes education after high school more affordable—but the first step to access financial aid is completing the Free Application for Federal Student Aid (FAFSA). The FAFSA is the gateway to multiple types of financial aid, including Pell grants (money that doesn’t need to be paid back), work-study opportunities (working on campus while earning money toward tuition and fees), and state scholarships (as of 2020, all Utah state sponsored scholarships require a FAFSA completion). FAFSA completion is strongly correlated with postsecondary enrollment: [nationally, 84% of high school seniors who completed the FAFSA subsequently enrolled in college](#).

Each year, Utah high school students leave around [\\$28 million in unclaimed Pell grants on the table](#)—again, this is grant aid that would not need to be paid back—which could have helped these students afford and pursue a postsecondary education. Pell grants are funded by tax dollars that Utahns have already paid to the federal government. As 49 other states in the nation complete the FAFSA at higher rates than Utah, these tax dollars are supporting students in other states to go to college—not Utah students.

In addition, the [Utah State Board of Education’s Portrait of a Graduate](#) supports students in developing such characteristics as critical thinking and problem solving, and civic, financial, and economic literacy. Filling out the FAFSA empowers students to use their critical thinking

and financial literacy skills developed during their K-12 experience to make their own fully-informed choice about their future. Completing the FAFSA does not mandate that students accept financial aid; instead, it shows students the educational opportunities in front of them and open doors for them to choose their own path.

The Utah Board of Higher Education values ongoing partnerships with the Utah State Board of Education, such as concurrent enrollment and high school credit for technical college courses, both of which are available at minimal costs to students and their high schools. Another key partnership is the Utah College Advising Corps, which has expanded to over 60 high schools and counting. These college access advisors support high school counselors in advising students on postsecondary education opportunities, scholarships, financial aid—including FAFSA—and college applications.

We respectfully request that the Utah State Board of Education reconsider the business case which came before them on September 9, 2022, to create a pilot program incentivizing LEAs to increase FAFSA completion and reduce the biggest barrier to postsecondary education. The Board of Higher Education looks forward to continued, deliberate, creative, and meaningful collaboration with the Utah State Board of Education to support all of Utah’s students in their transition from high school to postsecondary education—whatever that journey looks like for them.

Signed,

The Utah Board of Higher Education

Lisa Michele Church, Chair

Jessellie Anderson, Vice Chair

Grace Acosta

Stan Albrecht

Julie Beck

Stacey Bettridge

Rich Christiansen

Sanchaita Datta

Hope Eccles

Patricia Jones

Arthur Newell

Shawn Newell

Steve Starks

Scott Theurer

Richard Wheeler

Xitlalli Villanueva

Agency: UTAH STATE BOARD OF EDUCATION

Program or Request Title: FAFSA Completion Incentive System for LEAs

Summary of Request: (briefly articulate the need for the policy change or funding request and the anticipated outcomes)

What is the nature of your request?

Select one:

- POLICY REQUEST – You are seeking changes to Utah State Code to improve your program/services.
- BUSINESS CASE – You are seeking new or additional financial resources to support a program/service for education.
- BOTH POLICY and BUSINESS – You are proposing a new program or expansion of an existing program that will require new/amended state code and financial resources.

Questions? Please contact:

Dale Frost (dale.frost@schools.utah.gov) for questions related to a business case/funding request and

Angie Stallings (angie.stallings@schools.utah.gov) for questions related to a policy request.

USBE Lead Point of Contact:

Name: Nathan Auck

Email Address: Nathan.auck@schools.utah.gov

Phone Number: 801.201.6103

USBE Section: Teaching and Learning

Additional USBE points of contact (as needed):

Name: Bethany Marker

Email Address: Bethany.marker@schools.utah.gov

Phone Number: 801-538-7929

USBE Section: Student Supports

If you are already working with a policymaker or member of USBE leadership on this request, identify them below:

POLICY REQUEST

This section only needs to be completed if you are making a policy request (creating or changing existing Utah Code language).

1. Section(s) of State Code to be addressed (if none, insert “N/A”):

N/A

2. Describe the issues or concerns the legislation will address:

The pandemic has exacerbated college affordability challenges for Utahns, as young adults and students were more likely than other workers to become unemployed and face obstacles such as housing or childcare insecurity. Given these financial barriers, all available forms of financial aid are crucial tools to support credential attainment for students and their families.

Financial aid and scholarships make education after high school more affordable – but first, students must apply by filing the Free Application for Federal Student Aid (FAFSA) to be eligible for almost all these options. Each year, Utah high school students leave around \$40 million in unclaimed financial aid on the table—this is grant aid that would not need to be paid back. This money could significantly assist them in pursuing a postsecondary education and/or certification.

FAFSA completion is strongly associated with postsecondary enrollment: nationally, 84% of seniors who completed the FAFSA, enrolled in college the following fall. Additionally, postsecondary education is associated with all manner of positive outcomes, including financial, health, and civic, among others, which is why Utah Governor Cox’s One Utah Roadmap sets the goal of making postsecondary education an expectation for all Utahns.

3. Describe the history of the issues or concerns including relevant context and timelines:

Despite the importance of FAFSA completion, [Utah ranks last or second-to-last in the nation for FAFSA completion](#), depriving many of our students of the financial aid necessary to access postsecondary education. Additionally, completing the FAFSA application in no way mandates that a student accept the scholarships, grants and/or loans that they become eligible for. It just helps each student understand the financial picture their family will need to engage with associated with their college and career aspirations.

As FAFSA completion efforts encompass the high school to college transition, the higher education system and the K-12 system are responsible for this effort. Both systems should be working together to increase FAFSA completion. The proposed program would effectively combine the structure and funding that USBE can provide with the know-how and training that USHE can provide, to ensure both agencies are collaborating on this crucial issue, and to positively impacting the ability of Utahns to afford postsecondary education.

4. What are the suggested legislative solutions? Include code references and suggested language where possible:

This legislation proposes to establish a pilot program that will reward LEAs for increases in FAFSA completion numbers overall and for specific student group increases. The request is for \$1.5 million in one-time funding, which would be spent over two years. This would allow for the establishment of a baseline and engage all LEAs that serve high school seniors in related efforts. This performance-based model is similar to programs other states have implemented—including Texas—which have proven to be remarkably successful in increasing FAFSA completion numbers in their state.

The program would also require a close partnership with the Utah System of Higher Education, who would provide training, data, and support for LEAs as they embark on this effort.

5. What data needs to be collected to support this potential legislation? Include whether this data is currently collected and available:

USHE and USBE would continue to partner on data-gathering and sharing. Currently, both agencies are working on a shared dashboard, accessible to LEAs, that shows the rate of FAFSA completions in real time. This would be used to determine the amount of funding each LEA would earn based on increases to FAFSA completion. USHE is willing and able to support the data component of this request.

BUSINESS CASE

This section only needs to be completed if you are seeking new or additional funding.

1. Amount Requested:

Funding Source	Amount (\$)
FY 2023 one-time funding	\$0
FY 2024 one-time funding	\$1,500,000
FY 2024 ongoing funding	\$0
TOTAL funding requested	\$1,500,000

2. Describe how the business case supports the goals and metrics of the [USBE Strategic Plan](#).

The USBE Vision for statewide education includes the statement that “all Utah students are prepared to succeed and lead”. In order for most students to be able to access various post-secondary education options, completing the FAFSA is a necessary step. The proposed program would incentivize LEAs in creating coherent systemic structures, leveraging the many resources that they already have at their disposal, to support all students in understanding FAFSA’s importance to their future.

The USBE Equity definition also refers to providing “equitable resources including funding, programs, policies, initiatives and supports that recognize each student’s unique background and school context to guarantee that all students have access to high-quality education. With Utah ranking so low in the nation related to FAFSA completion rates, this program offers LEAs an incentive to find the local solutions their community requires in accessing post-secondary education.

3. Identify how the business case aligns with specific action steps within Strategic Priority #2 (Education innovation and investment) of the [One Utah Roadmap](#).

This business case aligns directly with two of the action steps within the Strategic Priority 2: Education Innovation and Investment. The first action is under “Equity – Provide every child with equitable opportunities and resources.” This funding will assist in the increased efforts around FAFSA completion that will provide the equitable access to federal, state, and institutional aid for Utah students they access postsecondary education. The second action this business case applies to is the goal around

“Attainment – Make post-secondary education the norm for every Utahn.” The FAFSA is the gateway to accessing all types of aid and scholarships for Utahns. If postsecondary education is the norm here in Utah, then filing the FAFSA should be normalized as well.

4. Explain how the business case advances the Board’s mission of “creating equitable conditions for student success: advocating for necessary resources, developing policy, and providing effective oversight and support.”

The FAFSA is the primary gateway for all Utah students to access all types of aid for post-secondary education, including federal aid (grants, work-study, student loans), state aid (scholarships, grants, etc.), institutional aid (scholarships, grants, etc.), and some private scholarships that require the FAFSA to be completed.

In addition, the proposed pilot program model rewards LEAs for increasing FAFSA completion for all seniors, with an additional weight on underrepresented students. This will help incent LEAs to support FAFSA completion for students who benefit the most from filling out the FAFSA, including those who would be first-generation college students and students experiencing socioeconomic disadvantage.

5. Which populations or geographic areas will benefit most from this request? What safeguards will be implemented to prevent inequities or other unintended distributional consequences as it relates to this request?

The communities that will benefit most from this business case are those that support their students most effectively in completing the FAFSA. The FAFSA is not just necessary for students experiencing socioeconomic disadvantage. It’s also part of the application process for many scholarships (including both the Utah Promise and the Utah Opportunity Scholarship).

The incentive is predicated upon the notion that those LEAs who do the most FAFSA outreach and completion per number of students enrolled in the school will be most highly rewarded. The students who will benefit the most will be underrepresented students, including those who would be first in their families to attend postsecondary education as well as students experiencing economic disadvantage.

6. Which stakeholders have you engaged and coordinated with during the development of this request?

The Utah System of Higher Education has been a key collaborator in this business case. They have assisted in providing information, ideas, statistics, and resources into this

case as it pertains to accomplishing the goals in their strategic plan and in accordance to the goals of their board members.

7. Summarize the current budget for the project or program that is being funded. If this is a new project or program, summarize resources that are available for like-objectives within USBE.

The vision for this incentive would be to create a pilot with a limited number of LEAs during the first year (23/24 if passed into law). These LEAs would be identified by the establishment of performance metrics relating to overall FAFSA completion, FAFSA completion growth year-over-year and representative student group completion of FAFSA (for senior-year students in an LEA only). LEAs that attain funding in the first year would automatically be eligible for funding in the second year of the pilot and there would be another opportunity for other LEAs to qualify (based on similar performance metrics) for the second year's funding.

Outcome data related to this pilot would be brought before the USBE in order to determine subsequent steps, with the possibility of an ongoing appropriation to support this work.

8. What problems would be solved with the additional funding? (Provide details and sources on any research or analysis that supports the evidence-basis for this request or the associated program such as a cost benefit analysis, program evaluation, results from a pilot program, etc.)

There are many barriers that are encountered when it comes to high school completion of the FAFSA. Nationwide, Utah tends to be [second to last in FAFSA completion](#) for high school students year after year. Because of the COVID pandemic, there has been a significant decrease in FAFSA completion both nationwide and statewide. Utah had a roughly [4% decrease in filing between the class of 2020 and the class of 2021](#). Despite a modest increase in FAFSA completions for the class of 2022, Utah still is not back to pre-pandemic levels. This adds up to tens of millions of dollars of free aid for college—aid that does not need to be paid back—that students are leaving on the table, unclaimed. Rewarding LEAs for focusing on increased FAFSA completions would help focus resources and attention between both the USHE and USBE systems to address this significant barrier to postsecondary access and affordability. Each agency can only do so much alone; but together, we can make significant progress on this stubborn problem.

9. Provide an itemized budget, including revenue and expenditure sources, for how the funding will be utilized.

Funding Source(s):

Program Name		
Cost Category	FY 2023	FY 2024
Personnel Services	\$	\$
Travel/In State	\$	\$
Travel/Out State	\$	\$
Current Expenses	\$	\$
Data Processing Current Expenses	\$	\$
Data Processing Capital Outlay	\$	\$
Capital Outlay	\$	\$
Other Charges/Pass Through	\$	\$1,500,000
Transfers	\$	\$
Other	\$	\$
Total	\$	\$1,500,000 (one-time)

USBE FTEs	FY 2023	FY 2024
USBE FTEs	0	0

10. To what extent is this request scalable? Articulate the impacts if lower funding amounts were provided for this request.

The current model is already scaled down below levels that Texas has found success with. It would be challenging to administer this program and justify the FTE costs USBE and USHE would incur were the funding to be lower.

The timeframe of the pilot could be scaled to a single year, though the ability to demonstrate substantial statewide progress in a single year would be extremely challenging.

11. What has been done or considered to address this problem with existing resources, instead of requesting additional state funding?

The Utah legislature has added a FAFSA completion requirement for all state-funded scholarships (with opt-out options). This has been instrumental in increasing awareness of the importance of FAFSA completion but, as seen by Utah's dismal FAFSA completion numbers, that has not been enough.

USHE supports the training and coordination of FAFSA Completion Open Houses/FAFSA Nights statewide. These open house events allow an opportunity for high schools to host a space for students and parents to complete the FAFSA with support from volunteers and school staff. Last year, USHE provided training to over 300 high school counselors and advisors on FAFSA support and updates.

The Utah College Advising Corps (UCAC) plays a significant role in supporting high school seniors on the path to college, including helping with FAFSA completion and financial aid options. While not all Utah high schools have a UCAC adviser currently, USHE is focused on bringing this much-needed resource to high schools to support high school seniors on the path to college and help alleviate the burden of high school counselors. Over 80 high schools in the state will have a UCAC advisor in the 2022-23 school year, with further expansion expected the subsequent year.

Another program USHE runs is the FAFSA Cup, which gives high schools an opportunity to win a \$1,000 grant, lunch with their team, and a trophy. The FAFSA Cup is a holistic review of the applications that takes into account more than just FAFSA completion percentage, such as essay answers, resources used and other items. This contest is available to all schools but USHE receives 10-15 applicants each year.

12. Are there any future funding obligations (operations and maintenance, multi-year scale up, etc.) created by this request? What are the long-term funding or policy needs for this project or program outside the current budget window of two years? How should the state prepare to address these longer-term needs?

This request would be a two-year pilot that would be administered in the 23/24 and 24/25 school years, were it to be passed in its current form. See above for details.

13. What value will these additional resources create for Utah and how will this value be measured? List the performance measure(s) that will be used to track outcomes for this business case.

Performance measures include:

- FAFSA completion increases overall by LEA
- FAFSA completion increases overall across the state
- FAFSA completion increases for underrepresented student populations by LEA

- Postsecondary enrollment increases by LEA, three years post high school graduation

The value of these additional resources will assist our high schools in their efforts towards FAFSA completion. Since Utah is the second to last state in FAFSA completion every year, these efforts will help the students of Utah open the door to the aid and scholarship opportunities that are available in our state, in our institutions, and from the federal government through Title IV aid. This will better equip our students to afford their higher education especially those who come from underrepresented communities and families. This will also label FAFSA as an important resource in our high schools to prepare their students for post-graduation.

We would track performance by reviewing FAFSA numbers that are provided from Federal Student Aid and the Department of Education. We can review the FAFSA data from years past to see if the completion rates are increasing. What's nice about this program is that we are providing those funds to the schools who are having increased completion based on the past and so we will see that increase in real time.

14. Is this request related to an effort to streamline, modernize, or innovate state government? If so, describe how this request furthers those efforts.

No.



September 16, 2022

General Consent Calendar

A. MINUTES

1. Minutes from Board meetings – (Attachment)

B. FINANCE AND FACILITIES

1. Annual Contracts and Grants Report – (Attachment)
2. Annual Institutional Residences Expense Report – (Attachment)
3. Annual Report on Foreign Gifts and Donations – (Attachment)
4. Utah State University Blanding Property Acquisition – (Attachment)

C. TECHNICAL EDUCATION

1. Transition of Clock-Hour to Credit-Hour Programs – (Attachment)
2. Program Alignment – (Attachment)

D. ACADEMIC EDUCATION

1. USHE Protocols for Senate Bill 127 (2022) – Early Literacy Outcomes Improvement – (Attachment)
2. USHE Protocols for Senate Bill 196 (2015) – Mathematics Competency Initiative – (Attachment)

E. STUDENT AFFAIRS

F. BOARD ADMINISTRATION

1. Technical Education and Board Policy Alignment – (Attachment)
2. President Astrid Tuminez Leave of Absence Request – (Attachment)

G. PROGRAM NOTIFICATIONS

INFORMATION:

New Program:

1. Southern Utah University – Master of Sciences in Nursing Leadership and Administration

NOTIFICATION:

New Program:

2. Utah Valley University – Certificate of Proficiency in Health and Wellness Coaching
3. Utah Valley University – Certificate of Proficiency in Interreligious Studies
4. Utah Valley University – Certificate of Proficiency in Japanese Language
5. Utah Valley University – Minor in Nutrition

New Emphasis

6. Utah Valley University – Master of Education – Elementary Arts Integration Emphasis
7. Utah Valley University – Master of Education – Elementary Science Emphasis

Discontinuance:

8. Utah Valley University – Endorsement in Dual Language Immersion Endorsement
9. Utah Valley University – Associate of Science in English
10. Utah Valley University – Associate of Science in English – Technical Communication Emphasis

H. AWARDS

1. University of Utah – IH National Cancer Institute; “CSSG_P30_Renewal_Ulrich”; \$4,199,958. Principal Investigator, Cornelia Ulrich.
2. University of Utah – NIH National Library of Medicine; “NLM UG4 202 Renewal”; \$2,013,730. Principal Investigator, Catherine B Soehner.
3. University of Utah – NIH National Cancer Institute; “SEER 2018”; \$2,169,014. Principal Investigator, Jenifer Anne Doherty.
4. University of Utah – NIH Natl Ctr for Advancing Transl Scnces; “CTSI UM1”; \$38,703,469. Principal Investigator, Rachel Hess.
5. University of Utah – IHHS Health & Resources Services Admn; “Casper/Hewes Pecarn Jan 2022”; \$3,200,000. Principal Investigator, Theron Charles Casper.
6. University of Utah – National Science Foundation; “PPOSS-FULL”; \$3,49,643. Principal Investigator, Ponnuswamy Sadayappan.
7. University of Utah – Utah Dept of Health Human Services; “IV-E Research FY23-27”; \$2,659,026. Principal Investigator, Meghan Louise Broadbent.
8. University of Utah – US Department of Defense; “WELM_DOD_06.23.2021_INI”; \$6,079,790. Principal Investigator, Alana Lee Welm.
9. University of Utah – US Department of Energy; “Enhanced Geothermal – Forge”; \$49,500,000. Principal Investigator, Joseph N Moore.
10. University of Utah – NIH Natl Inst Allergy & Infectious Dis; “Sundquist U54 Cheetah”; \$5,522,958. Principal Investigator, Wesley I Sundquist.
11. University of Utah – Genentech Inc; “ROCHE WA42294 OLE”; \$3,868,454. Principal Investigator, Mary Beth Scholand.
12. Utah State University – Air Force Research Laboratory; “Advanced Military Space Sensor System Task Order 2 – Precision Atomic Clocks Magnometers and Navigation Subtask”; \$15,700,004. Principal Investigator, Jeremy Nicoll.
13. Utah State University – Air Force Materiel Command; “Virtual Imagery Processing Capability High-Performance Computing Enhancements”; \$5,655,027. Principal Investigators, Shane Jenkins, Craig Kelley.
14. Utah Valley University – National Science Foundation; “Promoting Engagement in Chemistry, Physics and Earth Sciences”; \$1,500,000. Principal Investigator

GRANT PROPOSALS

1. University of Utah – NIH Natl Inst Neurology Disorders Stroke; “3D Gallium Array”; \$2,737,645. Principal Investigator, Divya Chandrasekhar.

2. University of Utah -DOD Defense Advanced Research Projects Agency; “DARPA MAX”; \$2,066,977. Principal Investigator, Seyed Armin Tajalli.
3. University of Utah – DOD Defense; “DARPA MAX”; \$2,021,066. Seyed Armin Blair.
4. University of Utah – US Department of Energy; “MUSE II”; \$16,000,000. Principal Investigator, Darryl P Butt.
5. University of Utah – NIH National Institute of Nursing Rsrch; “T32 Wallace Social Health”; \$2,706,898. Principal Investigator, Ander Schneider Wallace.
6. University of Utah – DHHS Agency for Healthcare Resh & Quality; “DDINTERACTION PA-20-074”; \$2,698,957. Principal Investigator, Daniel Malone.
7. University of Utah – NIH National Inst of General Medical Sci; “R35 HISTIDINE PHOSPHORYLATION”; \$2,010,000. Principal Investigator, Amy M Barrios.
8. University of Utah – DHHS National Institutes of Health; “Biosynthetic Enzymes”; \$3,058,717. Principal Investigator, Vahe Bandarian.
9. University of Utah – DHHS National Institutes of Health; “Par-19-367 (Renewal)”; \$2,954,755. Principal Investigator, Ofer Rog.
10. University of Utah – UT Division of Child and Family Services; “IV-E Research FY23-27”; \$2,843,392. Principal Investigator, Meghan Louise Broadbent.
11. University of Utah – NIH Natl Inst Dental Craniofacial Rsrch; “Composite”; \$8,154,000. Principal Investigator, Annette Fleckenstein.
12. University of Utah – University of New Mexico; “Gertz_PO1_Sub_UNM_05.25.2022”; \$2,550,057. Principal Investigator, Jason Gertz.
13. University of Utah – DHHS National Institutes of Health; “Reconnect”; \$4,700,509. Principal Investigator, Sarah Shizuko Morimoto.
14. University of Utah – DHHS Health Resources & Services Admn; “Villabos HRSA May 2022”; \$4,000,000. Principal Investigator, Michele Elizabeth Villalobos.
15. University of Utah – NIH Natl Inst Allergy & Infectious Dis; “R01 AII70236 Resub”; \$3,677.214. Principal Investigator, Timothy Hanley.
16. University of Utah – NIH Natl Ctr for Complmt & Integtv Hlth; “Kanekar R01 Bioenergetic Jun22”; \$2,687,559. Principal Investigator, Shami S Kanekar.
17. University of Utah – NIH Natl Inst Neurolog Disorders Stroke; “Dr. Brennan R01-Origins Renew”; \$2,542,473. Principal Investigator, Kevin C Brennan Jr.
18. University of Utah – Army Medical Research Acquisition Activity; “Nitrofurantoin PRMRP”; \$2,438,593. Principal Investigator, Dustin Lee Williams.
19. University of Utah – NIH Natl Ctr for Advncing Translt Scnces; “CTSI K12”; \$4,860,000. Principal Investigator, Maureen Murtaugh.
20. University of Utah – NIH Natl Ctr for Advncing Translt Scnces; “CTSI RC2 – DHARE”; \$3,843,610. Principal Investigator, Guilherme Del Fiol.
21. University of Utah – Utah Action Center; “Stem AC Evaluation”; \$2,340,723. Principal Investigator, Andrea K Rorrer.

22. University of Utah – US Department of Energy; “DOE SAGE-UIFL”; \$9,527,078. Principal Investigator, Jennifer Lee Weidhaas.
23. University of Utah – National Science Foundation; “NSF CPS Frontier”; \$4,053,674. Principal Investigator, Kam K Leang.
24. University of Utah – DOD Defense Advanced Resrch Prjcts Agcy; “MEMS Stabilized Clocks”; \$3,444,51. Principal Investigator, Massood Tabib-Azar.
25. University of Utah – National Science Foundation; “RE_VAMP”; \$2,996,832. Principal Investigator, Bart Raeymaekers.
26. University of Utah – NIH Natl Inst Neurolog Disorders Stroke; “Effective and Safe Modulation”; \$2,380,110. Principal Investigator, Ian Kubanek.
27. University of Utah – American Battery Factory Inc; “Commercial Manufacturing”; \$2,00,299. Principal Investigator, Tao Gao.
28. University of Utah – NIH Natl Inst Diabetes Kidney Dis; “Eating Mindfully NIDDK R01”; \$3,782,200. Principal Investigator, Tanya M Halliday.
29. University of Utah – NIH National Institute on Aging; “Fall-Risk in Geriatric MTBI”; \$3,777,970. Principal Investigator, Peter C Fino.
30. University of Utah – NIH National Cancer Institute; “Warner Echo R01 May 2022”; \$3,759,499. Principal Investigator, Echo Ln Warner.
31. University of Utah – NIH Natl Int Diabetes Digest Kidney Dis; “ML&ASB CGM+OPSC R01 June 2022”; \$2,757,838. Principal Investigator, Michelle Leann Litchman.
32. University of Utah – NIH National Institute Environl Hlth Sci; “Reilly R35”; \$8,580,137. Principal Investigator, Christopher A Reilly.
33. University of Utah – NIH Natl Inst Neurolog Disorders Stroke; “MGLUR5 in Epilepsy Revised”; \$3,463,583. Principal Investigator, Karen S Wilcox.
34. University of Utah – NIH Natl Inst Neurolog Disorders Stroke; “Singe Cell Types”; \$3,331,342. Principal Investigator, Eric W Schmidt.
35. University of Utah – DHHS National Institutes of Health; “o1 Resub Bortolato, Marco: A”; \$2,966,114. Principal Investigator, Marco Bortolato.
36. University of Utah – National Science Foundation; “TA Analysis 2021”; \$3,070,615. Principal Investigator, Charles Jui.
37. University of Utah – UT Division of Child and Family Services; “UT IV-E Training FY3-27”; \$18,379,639. Principal Investigator, Chad Hughes McDonald.
38. University of Utah – DHHS National Institutes of Health; “More Primary Care R01”; \$3,835,076. Principal Investigator, Eric L Garland.
39. University of Utah – NIH National Cancer Institute; “KEPKA_PREVENT_R01”; \$3,940,874. Principal Investigator, Deanna Lee Kepka.
40. University of Utah – DHHS National Institutes of Health; “ZH*-Hartnett PIS NIH R01 New”; \$3,822,634. Principal Investigator, Weiquan Zhu.
41. University of Utah – DHHS National Institutes of Health; “CAMP_NIH_R01_Resubmission”; \$3,629,540. Principal Investigator, Kevin J Whitehead.

42. University of Utah – DHHS National Institutes of Health; “MSTP T32 Resubmission”; \$3,363,291. Principal Investigator, Michael S Petrey.
43. University of Utah – DHH National Institutes of Health; “Campbell IH Ro1 New 6.6.2022”; \$3,186,991. Principal Investigator, Robert A Campbell.
44. University of Utah – DHHS National Institutes of Health; “Ro1 PA-20-185 Radiation”; \$3,057,665. Principal Investigator, Ravi Ranjan.
45. University of Utah – NIH National Cancer Institute; “Kirchhoff_Ro1_06.06.2022”; \$2,955,412. Principal Investigator, Anne C Kirchhoff.
46. University of Utah – DHHS National Institutes of Health; “Rothenfluh NIH Ro1”; \$2,946,983. Principal Investigator, Adrian Rothenfluh.
47. University of Utah – NIH National Inst Child Hlth & Human Dev; “DBTG”; \$2,700,000. Principal Investigator, H Joseph Yost.
48. University of Utah – DHHS National Institutes of Health; “Ro1-PA-20-183 Flutter”; \$2,620,377. Principal Investigator, Rave Ranjan.
49. University of Utah – DHHS National Institutes of Health; “Role for Leukotrienes”; \$2,591,412. Principal Investigator, Ademuyiwav Aromolara.
50. University of Utah – DHHS National Institutes of Health; “R33 Resub Drummond 7.16.22”; \$2,321,420. Principal Investigator, Micah J Drummond.
51. University of Utah – DHHS National Institutes of Health; “Leibold NIH Ro1 New 6.6.22”; \$2,094,169. Principal Investigator, Elizabeth A Leibold.
52. University of Utah -UD Department of Energy; “DE-FOA-0002630 Solar Thermal”; \$4,355,521. Principal Investigator, Kody Merlin Powell.
53. University of Utah – NIH National Cancer Institute; “Kinsey_Ro1_resub_05.26.2022”; \$3,843,262. Principal Investigator, Conan Grant Kinsey.
54. University of Utah – NIH National Institute on Aging; “Hardikar_Colorectal Cancer”; \$3,788,658. Principal Investigator, Sheetal Hardikar.
55. University of Utah -NIH National Institute on Aging; “O’Connell_Ro1_04.04.2022”; \$3,611,840. Principal Investigator, Ryan M O’Connell.
56. University of Utah – NIH National Cancer Institute; “Coletta_Ro1_06.06.2022”; \$3,527,586. Principal Investigator, Adriana M Coletta.
57. University of Utah – NIH Natl Ctr for Advncing Translt Scnes; “Dean U24 TIC June 2022”; \$23,098,671. Principal Investigator, J Michael Dean.
58. University of Utah – Army Medical Research Acquisition Actvty; “Puro Pouch TTDA Level 2”; \$4,887,609. Principal Investigator, Dustin Lee Williams.
59. University of Utah – NIH National Heart Lung & Blood Inst; “Holubkov U24 June 2022”; \$4,234,337. Principal Investigator, Richard Holubkov.
60. University of Utah – DHHS Agncy for Healthcare Resh & Quality; “Improving Diagnostic Safety”; \$3,999,131. Principal Investigator, Valerie Michele Vaughn.
61. University of Utah – DHHS National Institutes of Health; “Personalized Risk Stratificat”; \$3,865,436. Principal Investigator, Benjamin Adam Steinberg.

62. University of Utah – DHHS National Institutes of Health; “MAIT SEPSIS R01”; \$3,771,067.
Principal Investigator, Daniel Ted Leung.
63. University of Utah – Samhsa Center for Substance Abuse Prvntn; “Samhsa Mat-PDOA”;
\$3,750,000. Principal Investigator, Adam Joseph Gordan
64. University of Utah – DHHS National Institutes of Health; “ECMO Trial – Tonna R01 June2022”;
\$3,605,496. Principal Investigator, Joseph E Tonna.
65. University of Utah – Massachusetts General Hospital; “Rapaport Sub MGH Jun 2022”;
\$3,576,991. Principal Investigator, Mark Hyman Rapaport.
66. University of Utah – NIH National Inst of General Medical Sci; “NIH Nitro Gel”; \$3,548,177.
Principal Investigator, Dustin Lee Williams.
67. University of Utah – DHHS National Institutes of Health; “Lai R01 June 2022”; \$3,52,465.
Principal Investigator, Kent Lai.
68. University of Utah – NIH National Institute of Nursing Rsrch; “KNOY R01 June 2022”;
\$3,405,503. Principal Investigator, Flory Lumu Nkoy.
69. University of Utah – NIH National Inst Child Hlth & Hman Dev; “Hotaling SCI R01 June 2022”;
\$3,404,334. Principal Investigator, James Morris Hotaling.
70. University of Utah – DHHS National Institutes of Health; “Pelvic Prolapse Prevention”;
\$3,269,237. Principal Investigator, Carolyn W Swenson.
71. University of Utah – NIH National Institute of Mental Health; “Langenecker R33 June 2022”;
\$3,021,356. Principal Investigator, Scott Aaron Langenecker.
72. University of Utah – DHHS National Institutes of Health; “MOCHA”; \$2,991,206. Principal
Investigator, Chun Yuan.
73. University of Utah – DHHS National Institutes of Health; “Zelikowsky R01”; \$2,985,930.
Principal Investigator, Moriel Zelikowsky.
74. University of Utah – HRSA Bureau of Health Professions; “Utah AHEC”; \$2,962,438. Principal
Investigator, Ivette Maelia Lopez.
75. University of Utah -DHHS National Institutes of Health; “New R01 ROH Johnson”; \$2,338,913.
Principal Investigator, Minna Roh.
76. University of Utah – NIH Natl Inst Neurolog Disorders Stroke; “MRS FUS & Spinal Cord Injury”;
\$2,289,247. Principal Investigator, Donna Cross.
77. University of Utah – Army Medical Bone CAP Research Acquisition Actvty; “Bone Cap”;
\$2,245,878. Principal Investigator, David L Rothberg.
78. University of Utah – NIH National Eye Institute; “CNAP1 inVision”; \$2,236,917. Principal
Investigator, Jun Yang.
79. University of Utah – DHHS National Institutes of Health; “Decision Tools Diarrhea Childr”;
\$2,116,125. Principal Investigator, Daniel Ted Leung.
80. University of Utah – CDC National CTR for Infectious Diseases; “RFTOP 2021 Domain 1-A006”;
\$2,000,000. Principal Investigator, Matthew H Samore.
81. University of Utah – National Science Foundaton; “Pre-Proposal: AI Institute”; \$20,000,000.
Principal Investigator, Valerio Pasucci.

82. University of Utah – NIH National Inst of General Medical Sci; “NRBC”; \$6,798,640. Principal Investigator, Robert S Macleod.
83. University of Utah – NIH Natl Inst Dental Craniofacial Rsrch; “Craniorate”; \$3,757,123. Principal Investigator, Ross T Whitaker.
84. University of Utah – DHHS National Institutes of Health; “Blair NIH UG3/UH3 2022”; \$5,462,161. Principal Investigator, Steven M Blair.
85. University of Utah – DHHS National Institutes of Health; “Deans RO1 Synthetic Circuits”; \$3,424,759. Principal Investigator, Tara Lynn Deans.
86. University of Utah – NIH Natl Inst Deaf & other Comm Disorder; “U24 Center for Audiology”; \$2,880,499. Principal Investigator, Holly A Holman.
87. University of Utah – Utah System of Higher Education; “Robotics Deep Tech”; \$2,224,764. Principal Investigator, Mark Andrew Minor.
88. University of Utah – NIH Natl Int Diabetes Digest Kidney Dis; “Simonsen Maps Engage RO1June22”; \$3,805,951. Principal Investigator, Sara Marie Ellis Simonsen.
89. University of Utah – HRSA Rural Health Policy; “HRSA Rural Opioid”; \$2,000,000. Principal Investigator, Linda S Edelman.
90. University of Utah – DHHS National Institutes of Health; “Targeting ISCA2”; \$2,350,282. Principal Investigator, Mei Yee Koh.
91. University of Utah – DHHS National Institutes of Health; “RO1 Illudalogs in SUG”; \$2,336,029. Principal Investigator, Amy M Barrios.
92. University of Utah – DHHS National Institutes of Health; “RO1 20-183-Ranjan Tachycardia”; \$3,054,226. Principal Investigator, Ravi Ranjan.
93. University of Utah – DHHS National Institutes of Health; “Robin Shaw MPI RO1 Resub”; \$3,019,216. Principal Investigator, Robin Mark Shaw.
94. University of Utah – DHHS National Institutes of Health; “RO1 20-183-Ranjan (Flutter)”; \$2,696,551. Principal Investigator, Ravi Ranjan.
95. University of Utah – US Department of Energy; “Graphite and Lithium Battery”; \$50,001,107. Principal Investigator, Rasoul B Sorkhabi.
96. University of Utah – DHHS National Institutes of Health; “ENDO NIH RESUB”; \$3,894,880. Principal Investigator, Karen Cecilia Schliep.
97. University of Utah – DHHS National Institutes of Health; “RPL CVD”; \$3,866,898. Principal Investigator, Karen Cecilia Schliep.
98. University of Utah – NIH National Institute on Aging; “RO1 Regulatory Mech Resub”; \$3,846,640. Principal Investigator, Christopher T Gregg.
99. University of Utah – NIH National Institute of Nursing Rsrch; “RO1 Marc-Wellness Resub”; \$3,625,153. Principal Investigator, Jorie Michaela Butler.
100. University of Utah – DHHS National Institutes of Health; “Dr. Yan Renewal”; \$3,347,200. Principal Investigator, Tianxin Wang.
101. University of Utah – NIH National Institute of Mental Health; RO1MH129450 Resub Kirrel3-GABA”; \$3,199,386. Principal Investigator, Megan E Williams.

102. University of Utah- DHHS National Institutes of Health; “Clark Renewal Resub 07 2022”; \$3,122,465. Principal Investigator, Nathan Clark.
103. University of Utah – DHHS National Institutes of Health; “IAQ W Fast Response CFD”; \$2,808,379. Principal Investigator, Darrah Kaye Howe.
104. University of Utah – DHHS National Institutes of Health; Stork and Deep MRI Learning”; \$2,736,656. Principal Investigator, Edward Victor Rebok Di Bella.
105. University of Utah – DHHS National Institutes of Health; “English S10 Resub June 2022”; \$2,000,000. Principal Investigator, Justin Gregory English.
106. Utah State University – National Institutes of Health; “Age-Related Decline in Norepinephrine Activity and Increased Risk of Falls in Older Adults”; \$2,077,999. Principal Investigator, Michael Warren Christopher.
107. Utah State University – National Institutes of Health; “The dynamics of aging-associated ovarian cellular senescence”; \$3,553,365. Principal Investigator, Jeffrey Mason.
108. Utah State University – US Dept of Energy-Science;” Seme-Arid, changing Environment, Urban Integrated Field Laboratory”; \$6,004,868. Principal Investigator, Randal S Martin.
109. Utah State University – UT Department of Workforce Services;” URPD FY23”; \$3,945,069. Principal Investigator, Carrie M Stott.
110. Utah State University – US Dept of Int-Bureau of Land; “Supporting BLM Low-Tech Process-Based Restoration of Riverscapes”; \$2,729,886. Principal Investigator, Leah A Schilling.
111. Utah State University – Missile Defense Agency; “Trajectory Intensity Estimator Modernization”; \$2,608,033.
112. Utah State University – US Department of Education; “NASNTI Cooperative Arrangement Development Grant”; \$2,750,000. Principal Investigator, Joao Wilson Bueno.
113. Utah State University – Misc Federal Sponsors; “Twelve Space vehicle Assembly, Integration, and Testing (AI&T) and program management functions for the Space Development Agency (SDA) Tranche 1 Demonstration and Experimentation System (T1DES)”; \$6,858,320. Principal Investigator, Gavin Payne.
114. Utah State University – Misc Federal Sponsors; “Perform space vehicle assembly, Integration, and Testing in support of the National Defense Space Architecture (NDSA) Experimental Testbed (NEXT) program”; \$7,508,495. Principal Investigator, Gavin Payne.
115. Utah State University – Air Force Nuclear Weapons Center; “SDL will provide onsite Subject Matter Expert (SME) support of the Ground Based Strategic Deterrent (GBSD) program.”; \$7,773,757. Principal Investigator, Todd Eppich, Roger Ellis.



**Utah Board of Higher Education
Utah System of Higher Education
Thursday, July 14, 2022**

**COMMITTEE OF THE WHOLE
MINUTES**

Board Members Present

Lisa-Michele Church, chair
Jessellie Anderson, vice chair
Grace Acosta
Stan Albrecht
Stacey Bettridge
Rich Christiansen
Hope Eccles
Heather Johnson
Patricia Jones
Arthur Newell
Shawn Newell
Steve Starks
Scott Theurer
Xitlalli Villanueva
Rick Wheeler

Board Members Absent

Julie Beck
Sanchaita Datta

Office of the Commissioner

Dave R. Woolstenhulme, Commissioner of Higher Education
Geoffrey Landward, Deputy Commissioner and General Counsel
Taylor Adams, Associate Commissioner for Strategic Initiatives
Alison Adams-Perlac, Associate General Counsel
Trisha Dugovic, Director of Communication
Malin Francis, Director of Facilities & Planning
Brynn Fronk, Executive Assistant to the Utah Board of Higher Education
Jared Haines, Senior Advisor for Technical Education
Julie Hartley, Associate Commissioner of Academic Education
Melanie Heath, Assistant Commissioner of Strategic Initiatives
Vic Hockett, Talent Ready Utah Director
Lais Martinez, Assistant Commissioner for Equity, Diversity, and Inclusion
Carrie Mayne, Chief Economist
Jordan Passey, Budget and Planning Analyst
Juliette Tennert, Chief Financial Officer
Melissa Van Hien, Executive Assistant to the Commissioner
Scott Wyatt, Senior Executive Director of Online Education
Kim Ziebarth, Associate Commissioner of Technical Education

Institutional Presidents Present

Mindy Benson, Southern Utah University (interim)
Darin Brush, Davis Technical College
Clay Christensen, Mountainland Technical College
Noelle Cockett, Utah State University

Stacey McIff, Snow College (interim)
Brad Mortensen, Weber State University
Jordan Rushton, Dixie Technical College (interim)
Aaron Weight – Uintah Basin Technical College

Paul Hacking, Tooele Technical College
Deneece Huftalin, Salt Lake Community College

Richard Williams, Utah Tech University
Brennan Wood, Southwest Technical College

Boards of Trustees

Kent Alder, Utah State University
Gil Almquist, Dixie Technical College
Karla Bergeson, Weber State University
Danelle Brinkerhoff, Uintah Basin Technical College
Lori Chillingworth, Salt Lake Community College
Kearston Cutrbus, Weber State University
Michael Evans, Southwest Technical College
Christian Garner, University of Utah
Darin Gifford, Southwest Technical College
Jodi Hart Wilson, Southern Utah University
Dave Haskell, Tooele Technical College
Terri Hunter, Mountainland Technical College
Leslie Keisel, Snow College
Nancy Kennedy, Bridgerland Technical College
Camille Knudson, Tooele Technical College
Mari Krashowetz, Dixie Technical College
Colleen Kvetko, Utah Tech University
Rick Nielsen, Utah Valley University
Vanessa Perez, Mountainland Technical College
Rick Robinson, Snow College
Eric Schmutz, Southern Utah University
William Shafer, Ogden-Weber Technical College
Brady Southwick, Salt Lake Community College
James Taggart, Ogden-Weber Technical College
Eric Wamsley, Bridgerland Technical College
Tiffany Wilson, Utah Tech University
Troy Wood, Davis Technical College

Other Guests

Laura Snow, Chief of Staff, University of Utah
Chris Nelson, Chief University Relations Officer & Secretary to the University, University of Utah
Wayne Vaught, Provost / Sr. Vice President for Academic Affairs, Utah Valley University
Jacob Wright, Senior Budget & Policy Analyst, Governor's Office of Planning & Budget

Chair Church called the meeting to order at 10:00 a.m.

General Session

Welcome & Introductions

Chair Church welcomed the group and highlighted concerns and challenges the system is facing. This was an information item only; no action was taken.

How do the Strategic Plan and Statute Work Together?

Geoff Landward reviewed statute with the group and the difference in governance between the Utah Board of Higher Education and the institutional boards of trustees. This was an information item only; no action was taken.

Update of Progress on Strategic Plan

Commissioner Woolstenhulme emphasized how important it is that the institution's strategic plans fit into the Board's strategic plan. He reviewed the pillars of the plan. The Commissioner shared they are meeting with each institution to receive feedback on the Board's strategic plan. Changes to the plan will be proposed to the Board at the August committee meetings. Taylor Adams walked through the strategic plan in more detail and reviewed the plan on USHE's website. She provided a basis for what currently exists and noted that changes will be made in the August committee meetings. This was an information item only; no action was taken

Using Committees to Advance the Board's Work

Chair Church reviewed the committee assignments and introduced the USHE staff members supporting each committee, Julie Hartley, Melanie Heath, Juliette Tennert, and Kim Ziebarth.

Julie Hartley provided an overview of the work of the Academic Education Committee. Melanie Heath gave a summary of the Student Affairs Committee's work. Juliette Tennert reviewed the Finance and Facilities Committee assignments. Kim summarized the work of the Technical Education Committee. This was an information item only, no action was taken.

Opportunity for All Utahns

Lais Martinez discussed the attainment gaps that exist in higher education. She stated it is extremely critical that everything we do as a Board and system is centered around equity and closing the attainment gaps. She highlighted the work that is being done including the equity lens framework and equity-related resolutions. She explored the new Board to ask in every conversation they're a part of what is the equity imperative. She thanked the chief diversity officers for leading out on this work. This is an information item only; no action was taken.

Crisis Communications

Kelsey Richardson and Matthew Driscoll from R&R Partners provided crisis communications training to attendees. This was an information item only; no action was taken.

Breakout Sessions

The Board of Higher Education, boards of trustees, and presidents broke out into three separate breakout sessions. The Board of Higher Education discussed how the Board governs and can foster a successful system of higher education. They also discussed their next steps for the coming year. This was an information item only; no action was taken.

The meeting adjourned at 3:00 p.m.

Geoffrey Landward, Secretary

Date Approved:



**Utah Board of Higher Education
Southern Utah University
Thursday, July 14, 2022**

**COMMITTEE OF THE WHOLE
MINUTES**

Board Members Present

Lisa-Michele Church, chair
Jessalie Anderson, vice chair
Stan Albrecht
Stacey Bettridge
Julie Beck
Rich Christiansen
Heather Johnson
Pat Jones
Arthur Newell
Shawn Newell
Steve Starks
Scott Theurer
Xitlalli Villanueva
Rick Wheeler

Board Members Absent

Grace Acosta
Sanchaita Datta
Hope Eccles

Office of the Commissioner

Dave R. Woolstenhulme, Commissioner of Higher Education
Geoffrey Landward, Deputy Commissioner and General Counsel
Taylor Adams, Associate Commissioner for Strategic Initiatives
Alison Adams-Perlac, Associate General Counsel
Trisha Dugovic, Director of Communication
Malin Francis, Director of Facilities & Planning
Brynn Fronk, Executive Assistant to the Utah Board of Higher Education
Russ Galt, Senior Assistant Commissioner for Technical Education Finance
Jared Haines, Senior Advisor for Technical Education
Julie Hartley, Associate Commissioner of Academic Education
Melanie Heath, Assistant Commissioner of Strategic Initiatives
Vic Hockett, Talent Ready Utah Director
Lais Martinez, Assistant Commissioner for Equity, Diversity, and Inclusion
Carrie Mayne, Chief Economist
Jordan Passey, Budget and Planning Analyst
David Pulsipher, Audit Director
Brian Shuppy, Senior Assistant Commissioner for Budget and Planning
Juliette Tennert, Chief Financial Officer
Melissa Van Hien, Executive Assistant to the Commissioner
Scott Wyatt, Senior Executive Director of Online Education
Kim Ziebarth, Associate Commissioner of Technical Education

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Chad Campbell, Bridgerland Technical College
Clay Christensen, Mountainland Technical College
Noelle Cockett, Utah State University
Paul Hacking, Tooele Technical College
Deneece Huftalin, Salt Lake Community College
Stacey McIff, Snow College (interim)

Brad Mortensen, Weber State University
Taylor Randall, University of Utah
Jordan Rushton, Dixie Technical College (interim)
Jim Taggart – Ogden-Weber Technical College
Astrid Tuminez, Utah Valley University
Aaron Weight – Uintah Basin Technical College
Richard Williams, Utah Tech University
Brennan Wood, Southwest Technical College

Other Guests

Gil Almquist, Chair, Dixie Technical College Board of Trustees
Eliezer Bermudez, Dean of the College of Health Sciences, Utah Tech University
Joe de Brito
Brad Cook, Former President, Snow College
Jen Cook, Former First Lady, Snow College
Marvin Dodge, Vice President for Finance and Administration, Southern Utah University
Meena Iyer, Associate Professor of OT, Utah Tech University
Leslie Keisel, Chair, Snow College Board of Trustees
Colleen Kvetko, Vice Chair, Utah Tech University Board of Trustees
Michael Lacourse, Provost and VP of Academic Affairs, Utah Tech University
Donna Law, Executive Director for Development & Government Relations, Southern Utah University
Chris Nelson, Chief University Relations Officer and Secretary to the University, University of Utah
James Sage, Associate Provost, Southern Utah University
Laura Snow, Chief of Staff, University of Utah
Wayne Vaught, Provost and Senior Vice President for Academic Affairs, Utah Valley University
Tiffany Wilson, Chair, Utah Tech University Board of Trustees

Chair Church called the meeting to order at 3:00 p.m.

Committee of the Whole

New Board Member Oath of Office

Brynn Fronk administered the Oath of Office to Board members Stan Albrecht, Steve Starks, Rich Christiansen, and Julie Beck. This was an information item only; no action was taken.

2022-23 Budget Initiatives Use of Funds Received

Juliette Tennert reviewed the reallocation of funding annual report with the Board members. Chair Church asked Juliette to clarify timing for the Board to do the new budget request for the upcoming legislative session. Juliette explained that the Board will review the institutional budget requests at the September Board meeting. These requests are for fiscal year 2024, which will start July 1, 2023. Chair Church encouraged the Board members to read the requests in the Board materials for the September Board meeting. This was an information item only; no action was taken.

2023-24 Budget Process Guidelines

Juliette Tennert explained the proposed budget process guidelines to use for the upcoming budget requests. The Finance and Facilities Committee reviewed it in their meeting earlier in the morning and they approved. The budget guidelines were created for the institutions to have a framework as they are thinking through their budget requests. Commissioner Woolstenhulme shared that the requests will be

vetted through the Board committees in the August meetings. This was an information item only; no action was taken.

Resolution of Appreciation of Jera Bailey

Chair Church acknowledged and highlighted Board member Jera Bailey's service on the Board. **Board member Theurer moved to approve the Resolution of Appreciation for Board member Jera L. Bailey. Board member Shawn Newell seconded the motion and the motion passed.**

Resolution of Appreciation for Bradley J. Cook

Chair Church reviewed the Resolution of Appreciation for Bradley J. Cook and President Cook's contributions as the president of Snow College. **Board member Shawn Newell moved to approve the Resolution of Appreciation for Bradley J. Cook. Board member Bettridge seconded the motion and the motion passed.**

Occupational Therapy Doctorate from Utah Tech

Arthur Newell introduced the request that came before the Academic Affairs Committee in the June 2022 meeting. Utah Tech is proposing an occupational therapy doctorate, which is outside their institutional role as a regional university. Because of this, it requires approval from the Board. It has gone through all the prerequisite approval steps. Chair Church asked President Williams to provide background to the Board members so they understand the context of the request which President Williams provided. Board member Theurer asked the president to clarify that the crediting body would not accredit a master's degree program. President Williams clarified that they would, but they would have to transition in a couple years and it would be an additional cost. Board member Theurer asked if the PT program is a doctorate level program which President Williams answered in the affirmative. Board member Jones asked if the students would be sufficiently prepared to take a doctoral program. President Williams explained that the students are very prepared and have all the prerequisites. Washington County is supposed to grow to the size of Pittsburgh in the next 14 years. They know there is going to be additional demands than what they have now. Board member Theurer asked if there are currently private or other providers of these kind of services that employ occupational therapists in their area. President Williams answered the school systems, nursing homes, and care facilities. Julie Hartley provided insight into the approval process for out of mission programs. Chair Church acknowledged Board member Eccles's concerns about future accountability and review for an exception like this. Chair Church noted for the record that it is rare for the Board to approve these type of requests. Board member Theurer expressed support in approving the program request. Chair Church asked if this will be an ongoing thing because we might have continuing workforce needs in southern Utah. President Williams stated they don't think they can predict that. Board member Johnson asked what the hesitation is in providing this program. Chair Church explained the role and mission of the regional school is not to provide doctoral programs. Board member Beck expressed support of the proposal. Board member Villanueva inquired about timing of the accreditation, financial aid for students in the program, and whether students in the program will stay in the area or leave out of state. President Williams stated the accreditation is a continual process, but the first graduating class will graduate from an accredited program. He also noted the students will qualify for financial aid and that their goal is to have as many students in the state or southern Utah area as possible, but that will vary depending who's qualified. Board member Jones emphasized that occupational therapy not just for the elderly. **Board member Jones moved to approve Utah Tech University's out-of-mission Occupational Therapy Doctorate program under the narrow restrictive exception provided by statute and Board Policy R401, which gives the Board authority to approve an out-of-mission program. This proposed program has met the strict criteria of R401; specifically, it has received supportive feedback from peer institutions, demonstrated high regional and statewide workforce demand, explored and exhausted all potential of maximizing partnerships with other USHE institutions including the University of Utah, and lastly, it has demonstrated unique geographical isolation, necessitating a standalone program.**

Board member Theurer seconded the motion with the comment that this is a doctoral program because the accrediting body requires that, otherwise it would be a master's program and it would be much easier for us to approve as a Board. So I can second it for that reason. The obvious need, employment opportunity, and the interest in it, but this is an exception. The motion passed. Board member Christiansen commented that exceptions cannot become a standard.

Board member Albrecht made a motion the Board places a moratorium on the review of any institutional out of roles and missions programs until completion of a comprehensive review and the development of potential changes to current policy. Board member Christiansen seconded the motion and Board member Beck opposed. The motion passed.

Capitol Facilities Request Priority Guideline

Juliette Tennert presented the recommended changes to policies, procedures, and guidelines to approve the state funded capitol project requests. Chair Church emphasized the issues they had in the past with the guidelines. The Commissioner expressed hesitation to going back to a queue due to the scrutiny from the legislature. Chair Church liked that the changes are data driven and tied to the strategic plan. **Board member Jones moved to approve the 2023 Capital Facility Request Priority Guidelines. Board member Theurer seconded the motion and the motion passed. Board member Theurer moved to approve the revisions to policies R741 through R745. Vice Chair Anderson seconded the motion and the motion passed.**

Ogden-Weber Technical College – Nontraditional Arrangement with Ogden School District

President Taggart reviewed the nontraditional arrangement between Ogden-Weber Technical College and Ogden School District. Chair Church asked if the President had any concerns he is worried about. President Taggart expressed they felt it would be more appropriate to build a brand new building instead of utilizing a building that used to be a youth corrections facility. Juliette Tennert shared they have vetted the program and have no concerns. They support the recommendation to approve. **Board member Steve Starks moved to authorize Ogden-Weber Technical College to enter into a nontraditional arrangement with Ogden School District for a ground lease to construct an Ogden School District Technical High School Building. Board member Shawn Newell seconded the motion and the motion passed.**

Promise Partnership Proposal

Juliette reviewed the Promise Partnership Proposal with the Board. Commissioner Woolstenhulme applauded and thanked former Board member Crystal Maggelet for the work she is doing. He stated they plan to reach out to multiple businesses across the state to leverage opportunities. **Board member Steve Starks made a motion to approve FJ Management as a Promise Partner for the 2022-2023 academic year along with a thank you to them for their incredible leadership. Vice Chair Anderson seconded the motion and the motion passed.**

Consent Calendar

Board member Theurer moved to approve the Consent Calendar. Board member Christiansen seconded the motion and the motion passed.

Motion to Adjourn

Board member Theurer made a motion to adjourn. Another Board member seconded the motion, but because of audio difficulties, we were unable to verify the Board member's identity and the motion passed.

Board Meeting Minutes

Friday, July 14, 2022

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The meeting adjourned at 4:45 p.m.

Geoffrey Landward, Secretary

Date Approved:



**Utah Board of Higher Education
Southern Utah University
Friday, July 15, 2022**

**COMMITTEE OF THE WHOLE
MINUTES**

Board Members Present

Lisa-Michele Church, chair
Jessalie Anderson, vice chair
Stan Albrecht
Julie Beck
Stacey Bettridge
Rich Christiansen
Heather Johnson
Patricia Jones
Arthur Newell
Steve Starks
Scott Theurer
Xitlalli Villanueva
Rick Wheeler

Board Members Absent

Grace Acosta
Sanchaita Datta
Hope Eccles
Shawn Newell

Office of the Commissioner

Dave R. Woolstenhulme, Commissioner of Higher Education
Geoffrey Landward, Deputy Commissioner and General Counsel
Brynn Fronk, Executive Assistant to the Utah Board of Higher Education
Melissa Van Hien, Executive Assistant to the Commissioner

Southern Utah University Board of Trustees

Jodi Hart Wilson, chair
Eric Schmutz, vice chair
Michelle Eyre

Other Attendees

Members of the Southern Utah University and Cedar City community

Vice Chair Anderson called the meeting to order at 3:30 p.m.

Committee of the Whole

Vice Chair Anderson welcomed those in attendance and thanked members of the presidential search committee for their efforts. Southern Utah Board of Trustees Chair Jodi Hart Wilson provided some brief remarks. Vice Chair Anderson called for a motion. **Board member Stacey Bettridge made a motion to appoint Mindy Benson as president of Southern Utah University. Board member Christiansen seconded the motion and the motion passed.** Vice Chair Anderson introduced President Benson and welcomed her to give remarks. President Benson addressed the group and expressed her appreciation and excitement.

Board Meeting Minutes

Friday, July 15, 2022

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Chair Church made a motion to end closed session. Board member Theurer seconded the motion and the motion passed.

The meeting adjourned at 4:00 p.m.

Geoffrey Landward, Secretary

Date Approved:



September 16, 2022

USHE - Annual Contracts and Grants Report

Regent Policy R532, *Acceptance and Approval of Contracts and Grants*, requires USHE institutions to submit an annual report summarizing the number and dollar amounts of contract and grant awards received during the previous fiscal year.

The Board recognizes that securing research contracts and training grants provides significant benefits to the higher education community, the state of Utah, and society as a whole, by not only supporting critical advances in research but also through job creation. To ensure the Board is informed about the contracts and grants that institutions are engaged in, the Board has requested that an annual report be provided for each fiscal year that summarizes both the number of and dollar amount of awards received.

For FY 2022, the total number of contracts and grants (not including federal COVID-19 Relief), compared with the prior fiscal year, increased by 5 million or 0.1%, and the total dollar amount increased by \$10.6 million or 0.9%. Additionally, three federal COVID-19 relief grant funding of \$261 million was expended during FY22, received on a reimbursement basis, and is presented by institution in the following chart.

Institution	CARES	HEERF II	ARPA	Total
University of Utah	\$7,907,414	\$4,003,098	\$37,436,521	\$49,347,034
Utah State University	\$540,650	\$1,323,779	\$171,989	\$2,036,418
Weber State University	-	\$8,301,545	\$32,364,416	\$40,665,961
Southern Utah University	\$23,559,364	-	\$2,259,432	\$25,818,796
Snow College	-	\$2,946,949	\$4,718,130	\$7,665,079
Utah Tech University	-	\$7,631,640	\$19,451,544	\$27,083,185
Utah Valley University	-	\$791,823	\$58,925,569	\$59,717,392
Salt Lake Community College	-	\$6,059,732	\$31,989,592	\$38,049,324
Bridgerland Technical College	-	\$555,951	\$1,062,504	\$1,618,455
Davis Technical College	-	-	\$2,713,710	\$2,713,710
Dixie Technical College	-	\$102,704	\$573,545	\$676,249
Mountainland Technical College	-	\$147,935	\$1,101,042	\$1,248,977
Ogden-Weber Technical College	-	\$1,042,915	\$1,363,842	\$2,406,757
Southwest Technical College	-	\$96,291	\$692,730	\$789,021
Tooele Technical College	-	-	\$671,584	\$671,584
Uintah Basin Technical College	-	-	\$463,694	\$463,694
Total	\$32,007,428	\$33,004,363	\$195,959,844	\$260,971,635

Commissioner's Recommendation

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

Attachment

Utah System of Higher Education Contracts and Grants Report						
Institution	Fiscal Year 2021		Fiscal Year 2022		% Change	
	No.	Total \$ Amount	No.	Total \$ Amount	No.	Amount
University of Utah						
Research	1,943	\$469,756,812	1,906	\$495,318,350	-1.9%	5.4%
Instruction	187	32,333,697	231	38,290,560	23.5%	18.4%
Clinical	349	74,069,694	354	66,690,052	1.4%	-10.0%
Other	454	64,499,626	491	86,161,133	8.1%	33.6%
TOTAL Utah	2,933	\$640,659,829	2,982	\$686,460,095	1.7%	7.1%
Utah State University						
Research	1,027	\$310,643,432	913	\$294,015,601	-11.1%	-5.4%
Instruction	42	5,065,712	39	11,360,464	-7.1%	124.3%
Other	348	48,618,925	377	70,558,098	8.3%	45.1%
TOTAL USU	1,417	\$364,328,069	1,329	\$375,934,164	-6.2%	3.2%
Weber State University						
Research	48	\$4,136,680	41	\$8,286,773	-14.6%	100.3%
Instruction	31	2,872,357	68	10,583,647	119.4%	268.5%
Other	100	74,581,589	70	13,873,752	-30.0%	-81.4%
TOTAL WSU	179	\$81,590,626	179	\$32,744,172	0.0%	-59.9%
Southern Utah University						
Research	5	\$87,114	10	\$141,441	100.0%	62.4%
Instruction	18	789,909	12	1,078,952	-33.3%	36.6%
Other	144	13,775,709	147	14,065,589	2.1%	2.1%
TOTAL SUU	167	\$14,652,732	169	\$15,285,982	1.2%	4.3%
Snow College						
Research	3	\$44,227	5	\$60,825	66.7%	37.5%
Instruction	9	2,282,982	9	853,638	0.0%	-62.6%
Other	6	291,637	9	1,526,496	50.0%	423.4%
TOTAL Snow	18	\$2,618,846	23	\$2,440,958	27.8%	-6.8%
Utah Tech University						
Research	3	\$57,335	4	\$53,084	33.3%	-7.4%
Instruction	0	0	3	27,420		
Clinical	1	81,228	1	99,960	0.0%	23.1%
Other	42	4,431,668	44	3,399,803	4.8%	-23.3%
TOTAL UT	46	\$4,570,230	52	\$3,580,267	13.0%	-21.7%
Utah Valley University						
Research	22	\$1,126,056	26	\$1,967,448	18.2%	74.7%
Instruction	6	3,187,743	11	3,790,024	83.3%	18.9%
Other	45	5,616,181	50	6,235,095	11.1%	11.0%
TOTAL UVU	73	\$9,929,980	87	\$11,992,567	19.2%	20.8%
Salt Lake Community College						
Research	8	\$316,397	8	\$424,149	0.0%	34.1%
Instruction	11	1,037,527	24	1,565,836	118.2%	50.9%
Other	36	3,717,633	51	3,727,496	41.7%	0.3%
TOTAL SLCC	55	\$5,071,557	83	\$5,717,481	50.9%	12.7%

**Utah System of Higher Education
Contracts and Grants Report**

Institution	Fiscal Year 2021		Fiscal Year 2022		% Change	
	No.	Total \$ Amount	No.	Total \$ Amount	No.	Amount
Bridgerland Technical College						
Research	0	\$0	2	\$564,606		
Instruction	5	229,452	6	195,942	20.0%	-14.6%
TOTAL BTC	5	\$229,452	8	\$760,548	60.0%	231.5%
Davis Technical College						
Instruction	3	\$208,322	6	\$1,664,562	100.0%	699.0%
Other	4	2,821,635	3	1,665,292	-25.0%	-41.0%
TOTAL DTC	7	\$3,029,957	9	\$3,329,854	28.6%	9.9%
Dixie Technical College						
Other	2	237,130	2	800,700	0.0%	237.7%
TOTAL DXTC	2	\$237,130	2	\$800,700	0.0%	237.7%
Mountainland Technical College						
Instruction	1	\$157,793	1	\$474,181	0.0%	200.5%
TOTAL MTC	1	\$157,793	1	\$474,181	0.0%	200.5%
Ogden-Weber Technical College						
Instruction	11	\$580,300	4	\$94,000	-63.6%	-83.8%
Other	2	698,600	2	727,500	0.0%	4.1%
TOTAL OWTC	13	\$1,278,900	6	\$821,500	-53.8%	-35.8%
Southwest Technical College						
Instruction	2	\$142,258	0	\$0	-100.0%	-100.0%
Other	2	35,505	0	0	-100.0%	-100.0%
TOTAL SWTC	4	\$177,763	0	\$0	-100.0%	-100.0%
Toole Technical College						
Instruction	3	\$602,893	0	\$0	-100.0%	-100.0%
Other	2	769,571	0	0	-100.0%	-100.0%
TOTAL TTC	5	\$1,372,464	0	\$0	-100.0%	-100.0%
Uintah Basin Technical College						
Instruction	7	\$672,820	7	\$849,026	0.0%	26.2%
TOTAL UBTC	7	\$672,820	7	\$849,026	0.0%	26.2%
Total USHE						
Research	3,059	\$786,168,053	2,915	\$800,832,277	-4.7%	1.9%
Instruction	336	50,163,765	421	70,828,252	25.3%	41.2%
Clinical	350	74,150,922	355	66,790,012	1.4%	-9.9%
Other	1,187	220,095,409	1,246	202,740,954	5.0%	-7.9%
TOTAL USHE	4,932	\$1,130,578,148	4,937	\$1,141,191,496	0.1%	0.9%



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

September 16, 2022

Annual Institutional Residences Expense Report

Board Policy R207, *Institutional Residences for Colleges and Universities in the Utah System of Higher Education*, requires USHE institutions to submit an annual report summarizing the actual and budgeted expenses, as approved by the institution's respective board of trustees, for institutional residences.

The Board has asked for an annual report summarizing the actual and budgeted expenses associated with institutional residences, including maintenance costs, custodial and domestic assistance, and insurance.

This report is used to inform the Board about institutional residence expenditures and help Boards of trustees and institutions monitor and maintain appropriate internal controls, ensure that institutional residence budgets and expenses are reviewed and approved annually, and provide transparency regarding the facility's operation and maintenance costs.

The attached report summarizes each institutional residence's approved budget and expenditures for the past three fiscal years. Footnotes have been added to describe any significant change from prior years, any significant variances between the budgeted and actual expenditures, and any significant capital improvements to the residence.

Commissioner's Recommendation

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

Attachment

Utah System of Higher Education
Institutional Residences Expense Report
FY 2020-2023

	2019-20		2020-21		2021-22		2022-23	Source of Funds	Square Footage
	Budget	Actual	Budget	Actual	Budget	Actual	Budget		
UofU	\$ 71,400	\$ 62,549	\$ 76,350	\$ 61,705	\$ 79,800	\$ 68,338	\$ 85,400	Discretionary	8,807
USU	\$ 72,000	\$ 99,079	\$ 72,000	\$ 36,988	\$ 72,000	\$ 36,772	\$ 72,000	E&G	12,403
WSU ¹	\$ 28,300	\$ 22,780	\$ 29,150	\$ 22,166	\$ 29,200	\$ 22,168	\$ 29,200	E&G	-
SUU ²	\$ 490,500	\$ 589,159	\$ 6,300	\$ 6,303	\$ 21,900	\$ 6,986	\$ 12,300	E&G, Discretionary	6,692
Snow	\$ 59,052	\$ 83,051	\$ 11,400	\$ 14,819	\$ 11,400	\$ 12,488	\$ 11,400	E&G, Discretionary	6,128
UT	\$ 23,500	\$ 18,636	\$ 27,500	\$ 38,221	\$ 42,000	\$ 26,230	\$ 52,500	E&G, Auxiliary	5,246
UVU ¹	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 36,000	\$ 48,000	E&G	-
SLCC ¹	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	Discretionary	-

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

¹WSU, UVU, SLCC - amounts reflect housing allowance and institutional functions.

²SUU - remodel of newly purchased home during FY19 and FY20 with \$320,000 for construction and \$130,000 for landscaping using discretionary funds; remodel of current residence to Child & Family Development Center funded from private donations. Minimal costs for FY21 as home remodel was completed in FY20.

Technical Colleges do not have institutional residences nor do Presidents receive a housing allowance.



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

September 16, 2022

Annual Report on Foreign Gifts and Donations

In 2010, the Utah Legislature enacted [H.B. 114, *Disclosure of Donations to Higher Education Institutions*](#), which requires the Utah Board of Higher Education to report annually to the Legislature certain gifts of \$50,000 or more during the fiscal period beginning July 1 and ending on June 30.

Any donations or gifts made to USHE institutions from a foreign person or entity in the form of an endowment, scholarship, gift, donation, or grant of money or property of any kind that is \$50,000 or more in a given year, must be reported to the Legislature. The \$50,000 is increased to \$250,000 or more if the gift is from a permanent resident of the United States, as defined by section 245 of the [Immigration and Nationality Act](#), who has been a resident for ten years or more.

As per Board Policy [R545, *Disclosure of Foreign Donations*](#), all higher education institutions have reported to the Office of the Commissioner on foreign donations or gifts received. For the 2021-22 fiscal year, only the University of Utah and Utah State University have reportable donations to disclose.

The report shows the University of Utah and Utah State University received \$1,100,640 in foreign donations; no other USHE institution received a foreign donation that fit the statutory requirements.

Institution	Foreign Donations FY 2021-22
University of Utah	\$1,042,680
Utah State University	\$57,960
System Total	\$1,100,640

Commissioner's Recommendations

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

University of Utah

Name of Foreign Person/Individual	Country of Citizenship or Principal Residence	Date Received	\$ Amount of Each Gift	Aggregate \$ Amount per Foreign Person	If a Gift is Conditional - Describe Conditions/Restrictions
Jou, M.J.	Taiwan	1/2/2021	50,000	50,000	
Garret, Jean	Brazil	1/2/2021	82,680	82,680	
Kim, Yong	Korea, Republic of	1/2/2021	200,000	200,000	
Lassonde, Janelle	Canada	1/2/2021	325,000	325,000	
Lassonde, Pierre	Canada	1/2/2021	325,000	325,000	
Garver, Patrick	Canada	1/2/2021	60,000	60,000	
	University of Utah Total		1,042,680	1,042,680	

Utah State University

Name of Foreign Person/Individual	Country of Citizenship or Principal Residence	Date Received	\$ Amount of Each Gift	Aggregate \$ Amount per Foreign Person	If a Gift is Conditional - Describe Conditions/Restrictions
Benevity Community Impact Fund	Canada	07/09/2021	200		School of Teacher Education & Leadership (TEAL)
Benevity Community Impact Fund	Canada	08/05/2021	180		Big Blue Scholarship Fund
Benevity Community Impact Fund	Canada	08/05/2021	20		Computer Science
Benevity Community Impact Fund	Canada	08/05/2021	20		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	08/05/2021	200		College of Engineering
Benevity Community Impact Fund	Canada	08/05/2021	20		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	08/05/2021	100		Engineers Without Borders
Benevity Community Impact Fund	Canada	08/05/2021	122		Utah State University
Benevity Community Impact Fund	Canada	09/10/2021	20		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	09/10/2021	9,000		Swaner EcoCenter
Benevity Community Impact Fund	Canada	09/10/2021	200		College of Engineering
Benevity Community Impact Fund	Canada	09/10/2021	20		Computer Science
Benevity Community Impact Fund	Canada	09/10/2021	20		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	09/10/2021	200		Engineers Without Borders
Benevity Community Impact Fund	Canada	09/10/2021	366		Utah State University
Benevity Community Impact Fund	Canada	10/07/2021	20		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	10/07/2021	200		College of Engineering
Benevity Community Impact Fund	Canada	10/07/2021	100		Engineers Without Borders
Benevity Community Impact Fund	Canada	10/07/2021	20		Computer Science
Benevity Community Impact Fund	Canada	10/07/2021	20		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	10/07/2021	96		Rickert-Areno Engineering Scholarship
Benevity Community Impact Fund	Canada	10/07/2021	222		Utah State University
Benevity Community Impact Fund	Canada	11/11/2021	96		Rickert-Areno Engineering Scholarship
Benevity Community Impact Fund	Canada	11/11/2021	200		College of Engineering
Benevity Community Impact Fund	Canada	11/11/2021	20		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	11/11/2021	20		Computer Science
Benevity Community Impact Fund	Canada	11/11/2021	20		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	11/11/2021	583		School of Teacher Education & Leadership (TEAL)
Benevity Community Impact Fund	Canada	11/11/2021	225		Utah State University
Benevity Community Impact Fund	Canada	12/13/2021	486		Natalie P. Andrews & Christopher Chaves e Silva Endowed Scholarship
Benevity Community Impact Fund	Canada	12/13/2021	50		John & Dorothy Crockett Endowment
Benevity Community Impact Fund	Canada	12/13/2021	150		Andrea Watts Saxton Make It All Better Scholarship Endowment
Benevity Community Impact Fund	Canada	12/13/2021	100		Humanities & Social Sciences
Benevity Community Impact Fund	Canada	12/13/2021	20		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	12/13/2021	300		College of Engineering
Benevity Community Impact Fund	Canada	12/13/2021	96		Rickert-Areno Engineering Scholarship
Benevity Community Impact Fund	Canada	12/13/2021	20		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	12/13/2021	1,009		Computer Science
Benevity Community Impact Fund	Canada	12/13/2021	347		Utah State University
Benevity Community Impact Fund	Canada	01/11/2022	400		Student Emergency Hardship Fund
Benevity Community Impact Fund	Canada	01/11/2022	525		Huntsman Alumni Scholarship
Benevity Community Impact Fund	Canada	01/11/2022	20		Computer Science
Benevity Community Impact Fund	Canada	01/11/2022	20		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	01/11/2022	200		Rex Leroy Hurst Endowment
Benevity Community Impact Fund	Canada	01/11/2022	20		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	01/11/2022	3,000		Football

Utah State University

Name of Foreign Person/Individual	Country of Citizenship or Principal Residence	Date Received	\$ Amount of Each Gift	Aggregate \$ Amount per Foreign Person	If a Gift is Conditional - Describe Conditions/Restrictions
Benevity Community Impact Fund	Canada	01/11/2022	96		Rickert-Areno Engineering Scholarship
Benevity Community Impact Fund	Canada	01/11/2022	600		Aggies Unlimited
Benevity Community Impact Fund	Canada	01/11/2022	200		Computer Science Scholarship
Benevity Community Impact Fund	Canada	01/11/2022	192		Mathematics & Statistics Scholarship
Benevity Community Impact Fund	Canada	01/11/2022	150		STEM Initiative
Benevity Community Impact Fund	Canada	01/11/2022	100		Vicki Hurst Allan Endowed Scholarship in Computer Science
Benevity Community Impact Fund	Canada	01/11/2022	100		Stephen J. Allan Endowed Scholarship in Computer Science
Benevity Community Impact Fund	Canada	01/11/2022	950		College of Engineering
Benevity Community Impact Fund	Canada	01/11/2022	1,700		College of Engineering Scholarship
Benevity Community Impact Fund	Canada	01/11/2022	2,117		Utah State University
Benevity Community Impact Fund	Canada	02/11/2022	8,619		Evans Family Scholarship Endowment
Benevity Community Impact Fund	Canada	02/11/2022	75		F. Ross & Mary Kay Peterson Scholarship
Benevity Community Impact Fund	Canada	02/11/2022	5,000		Shane & Jennifer Lowe Student-Athlete Scholarship
Benevity Community Impact Fund	Canada	02/11/2022	97		USU General Scholarships
Benevity Community Impact Fund	Canada	02/11/2022	5,000		Ann Shallcross Johnson Scholarship
Benevity Community Impact Fund	Canada	02/11/2022	145		Aimee Leaming Wilson "Be Kind" Scholarship Endowment
Benevity Community Impact Fund	Canada	02/11/2022	97		Communicative Disorders & Deaf Education
Benevity Community Impact Fund	Canada	02/11/2022	1,700		Tessa & Kevin White Family Scholarship Endowment
Benevity Community Impact Fund	Canada	02/11/2022	20		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	02/11/2022	96		Rickert-Areno Engineering Scholarship
Benevity Community Impact Fund	Canada	02/11/2022	20		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	02/11/2022	20		Computer Science
Benevity Community Impact Fund	Canada	02/11/2022	192		IOPG Intern Travel
Benevity Community Impact Fund	Canada	02/11/2022	200		College of Engineering
Benevity Community Impact Fund	Canada	02/11/2022	1,139		Utah State University
Benevity Community Impact Fund	Canada	03/11/2022	150		F. Ross & Mary Kay Peterson Scholarship
Benevity Community Impact Fund	Canada	03/11/2022	67		Humanities & Social Sciences
Benevity Community Impact Fund	Canada	03/11/2022	14		USU General Scholarships
Benevity Community Impact Fund	Canada	03/11/2022	20		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	03/11/2022	96		Rickert-Areno Engineering Scholarship
Benevity Community Impact Fund	Canada	03/11/2022	20		Computer Science
Benevity Community Impact Fund	Canada	03/11/2022	20		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	03/11/2022	25		Women's Basketball
Benevity Community Impact Fund	Canada	03/11/2022	450		College of Engineering
Benevity Community Impact Fund	Canada	03/11/2022	778		Utah State University
Benevity Community Impact Fund	Canada	03/30/2022	75		F. Ross & Mary Kay Peterson Scholarship
Benevity Community Impact Fund	Canada	03/30/2022	20		Computer Science
Benevity Community Impact Fund	Canada	03/30/2022	20		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	03/30/2022	20		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	03/30/2022	192		Rickert-Areno Engineering Scholarship
Benevity Community Impact Fund	Canada	03/30/2022	25		Women's Basketball
Benevity Community Impact Fund	Canada	03/30/2022	200		Mitch & Leslie Butikofer Scholarship
Benevity Community Impact Fund	Canada	03/30/2022	257		Utah State University
Benevity Community Impact Fund	Canada	04/12/2022	10		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	04/12/2022	10		Computer Science
Benevity Community Impact Fund	Canada	04/12/2022	10		Animal Dairy and Veterinary Science

Utah State University

Name of Foreign Person/Individual	Country of Citizenship or Principal Residence	Date Received	\$ Amount of Each Gift	Aggregate \$ Amount per Foreign Person	If a Gift is Conditional - Describe Conditions/Restrictions
Benevity Community Impact Fund	Canada	04/22/2022	10		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	04/22/2022	10		Computer Science
Benevity Community Impact Fund	Canada	04/22/2022	10		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	05/10/2022	75		F. Ross & Mary Kay Peterson Scholarship
Benevity Community Impact Fund	Canada	05/10/2022	100		Big Blue Scholarship Fund
Benevity Community Impact Fund	Canada	05/10/2022	24		Statewide Campuses
Benevity Community Impact Fund	Canada	05/10/2022	192		Rickert-Areno Engineering Scholarship
Benevity Community Impact Fund	Canada	05/10/2022	400		Jon M. Huntsman School of Business
Benevity Community Impact Fund	Canada	05/10/2022	37		Women's Basketball
Benevity Community Impact Fund	Canada	05/10/2022	200		Mitch & Leslie Butikofer Scholarship
Benevity Community Impact Fund	Canada	05/10/2022	443		Utah State University
Benevity Community Impact Fund	Canada	06/03/2022	2		Utah State University
Benevity Community Impact Fund	Canada	06/09/2022	75		F. Ross & Mary Kay Peterson Scholarship
Benevity Community Impact Fund	Canada	06/09/2022	10		Student Emergency Hardship Fund
Benevity Community Impact Fund	Canada	06/09/2022	50		Mitch & Leslie Butikofer Scholarship
Benevity Community Impact Fund	Canada	06/09/2022	3,958		Aggies Unlimited
Benevity Community Impact Fund	Canada	06/09/2022	495		Merlin Olsen Fund for Football Competitive Excellence
Benevity Community Impact Fund	Canada	06/09/2022	495		Wayne Estes Fund
Benevity Community Impact Fund	Canada	06/09/2022	20		Computer Science
Benevity Community Impact Fund	Canada	06/09/2022	20		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	06/09/2022	75		Women's Basketball
Benevity Community Impact Fund	Canada	06/09/2022	20		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	06/09/2022	77		Utah State University
Benevity Community Impact Fund	Canada	06/09/2022	97		School of Teacher Education & Leadership (TEAL)
Benevity Community Impact Fund	Canada	06/30/2022	75		F. Ross & Mary Kay Peterson Scholarship
Benevity Community Impact Fund	Canada	06/30/2022	20		Computer Science
Benevity Community Impact Fund	Canada	06/30/2022	20		Nutrition Dietetics & Food Sciences
Benevity Community Impact Fund	Canada	06/30/2022	20		Animal Dairy and Veterinary Science
Benevity Community Impact Fund	Canada	06/30/2022	97		School of Teacher Education & Leadership (TEAL)
Benevity Community Impact Fund	Canada	06/30/2022	50		Women's Basketball
Benevity Community Impact Fund	Canada	06/30/2022	387	57,960	Utah State University
	Utah State University Total		57,960	57,960	
Utah System of Higher Education Total			1,100,640	1,100,640	



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

September 16, 2022

Utah State University – Blanding Property Acquisition

Board Policy R703, *Acquisition of Real Property*, requires the institutions of higher education to inform the Utah Board of Higher Education of the acquisition of institutional property valued at less than \$1,500,000. Utah State University (USU) is informing the Board of the acquisition of 1.43 acres and a 10-foot strip of land between the 1.43 acres and the USU Blanding Technical Education Building. It was necessary to acquire the 10-foot strip from the city of Blanding to join the two properties successfully.

USU offered the fair market appraised value of \$60,000 to acquire the 1.43 acres with the condition that USU acquire the 10-foot strip from the city of Blanding in exchange for a long-term easement. Utah State University Board of Trustees approved the acquisition on December 3, 2021.

Commissioner's Recommendations

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

Attachment



August 18, 2022

Commissioner Dave Woolstenhulme
Utah State Board of Regents
Board of Regents Building The Gateway
60 South 400 West
Salt Lake City, Utah 84101-1284

Subject: Real Property Acquisitions

Dear Commissioner Woolstenhulme:

Following Board of Regents policy R703, Acquisition of Real Property, Utah State University desires to report the acquisition of two parcels of unimproved land located at approximately 860 South and 200 West in Blanding, Utah. The properties are 1.43 acres and a 10-foot strip between the 1.43 acres and the USU Blanding Technical Education Building property as shown in Exhibit A. To successfully join the two properties, it was necessary for USU to acquire the 10-foot strip from Blanding City in exchange for a long-term easement granted to the City for future storm drainage.

USU offered the fair market appraised value of \$60,000 to acquire the 1.43 acres. Acquisition of the property allows the Trucking Program to expand the driving practice course and provide necessary parking and storage space for vehicles and equipment. The source of funding was funds available through Tech Education.

The Utah State University Board of Trustees approved the acquisition of the 1.43 acres with the condition that USU acquire the 10-foot strip from Blanding City in exchange for a long-term easement in the December 3, 2021, meeting. Acquisition of the 10-foot strip will be finalized after the 1.43 acre purchase has been recorded.

We appreciate your support and request that this item be reported to the Finance and Facilities Committee during the September meeting.

Sincerely,

A handwritten signature in black ink, appearing to read 'David T. Cowley'.

David T. Cowley

Vice President for Finance & Administrative Services

cc: Juliette Tennert, Chief Financial Officer
Malin Francis, Director of Facilities & Planning
Noelle E. Cockett, President

EXHIBIT A





UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

September 16, 2022

Transition of Clock-Hour to Credit-Hour Programs

As part of the strategic plan, the Utah Board of Higher Education (Board) approved the transition of technical education programs from clock-hours to credit hours. In July 2021, the Board passed policy R474, *Clock-Hour to Credit-Hour Transition* to guide the process. Within the policy, section 4.2 states that each program's transition to credit, including the delivery format, must be approved by the Board. This approval is required by:

- the Council on Occupational Education (COE), the agency that accredits the technical colleges;
- the U.S. Department of Education for financial aid eligible programs.

Section 4.3 of the policy states that institutions shall submit applications for approval of the clock-hour to credit-hour conversion by the accrediting body through the Office of the Commissioner following a prescribed schedule. Following approval, the Office of the Commissioner will submit the applications to the COE for approval.

The total cost for the transition is \$25,000. Based on the number of programs offered by each institution, technical colleges will reimburse the system office for this amount.

Because technical colleges offer certificates only, institutions must retain both clock-hours and credit-hours in the student information system. Once the transition of all programs is complete, credit-hours will be used in publications and articulation agreements. Credit will be calculated using a formula provided by the U.S. Department of Education. There will be some flexibility on implementation.

Commissioner's Recommendation

The Commissioner recommends approval of the transition of the programs included in the attachment from clock-hours to credit-hours.

Attachment

College	Alias	Program	Clock-hour length	Proposed Credit-Hours	Delivery Method*
Mountainland	Nail Technician	Nail Technician	300	9	H
Mountainland	Surgical Technology	Surgical Technology	1314	32	T
Mountainland	Software Development	Web Programming and Development	900	27	H
Uintah Basin	Energy Services	Tower Technician	90	3	H

*Delivery Method

T – Traditional

H - Hybrid



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

September 16, 2022

Program Alignment

The Utah Board of Higher Education Strategic Plan includes a tactic to facilitate coordination among technical education programs to align program structure and course content to support transfer. This initiative is represented in a strategy to facilitate completion through the development of stackable credentials to support student transfer among institutions.

Information

Technical education programs have general broad alignment across technical education institutions, particularly those regulated through licensure or programmatic accreditations, which make up about half of the programs offered. Currently, program and course names, lengths, and objectives in the same occupational areas including regulated programs differ between institutions.

Degree granting institutions develop articulation agreements with each technical college, for each program area separately. Agreements define coursework that is transferable between the two institutions. Given that technical education programs may change on an annual basis in response to industry feedback provided through established occupational advisory committees, the work required to develop and maintain these agreements is significant.

By aligning programs across technical education institutions, articulation agreements developed by degree granting institutions will apply broadly to all technical college students who have completed the aligned programs and courses. For example, SLCC has internal articulations between technical college and academic programs. When technical education programs and courses are aligned across the system, these agreements will not only apply to SLCC students, but to any technical education student who has completed that program or course in the state.

Through this effort, degree-granting institutions will be better positioned to develop broad articulation agreements that benefit all technical college students who progress educationally, regardless of the institution they choose to attend.

Benefits

Students who receive credit for coursework already completed save time and tuition dollars. Reducing the duplication of completed courses helps students to progress more quickly to graduation. Reducing time to

completion reduces the odds of education being interrupted by life circumstances and increases graduation rates. This is particularly important to nontraditional students and underrepresented populations.

Expectations

- The Utah System of Higher Education (USHE) Commissioner's office coordinates and provides guidance and assistance on the alignment initiative
- Institutions must implement aligned programs within two years unless reasonable exceptions are granted by the Board of Higher Education Technical Education Committee
- The alignment initiative will follow program and course guidelines, including:
 - required participation of USHE institutions that offer technical education programs
 - alignment of program title, length in clock-hours and credit hours, description, and objectives
 - alignment of course numbers, titles, length in clock-hours and credit hours, descriptions, and objectives
 - a core of required courses representing foundational knowledge and skills comprised of at least 70% of the total program length
 - potential broad selection of elective courses representing regional employment needs comprising of no more than 30% of the total program length
- Programs offered by single institutions are submitted to the Office of the Commissioner to be included in the program inventory
- Electives can be added to the program at any time during the year and should be reported to the committee and Office of the Commissioner annually. Program committees consider whether to include electives in program requirements

Program Faculty Committees

- Faculty Program Committees are made up of one faculty representative for each program offered by an institution. The roster is updated annually.
- Faculty Program Committees will be convened, and new members oriented at the beginning of each fiscal year.
- Program committees will be made up of only one full-time faculty subject matter expert per program, per technical education institution in which the program is offered.
- Faculty are encouraged to send a faculty substitute if they are unable to attend a meeting.
- In cases where a full-time faculty member is not available, a program director may represent the program.
- Effort should be made to accommodate the schedules of as many attendees as possible.
- Committees should meet as often as needed to achieve the timeline goals identified below and at least once per year after alignment is achieved.
- While video conferencing is possible and acceptable, workgroup members are encouraged to maximize engagement and understanding of program and course content.

- Faculty should get supervisor approval and follow institutional procedures to get substitute faculty, if necessary to provide instructional coverage during their absence.
- Institutions will cover the cost to host, travel to, and/or participate in committee meetings.
- A simple majority of participating institutions will constitute agreement.
- Data will be used to inform decisions and changes to programs and courses.
- Institutions are required to implement agreed-upon courses and programs.

Process

- The Office of the Commissioner compiles and submits Program Committee proposals and modifications of proposals to Instructional Officers for review and recommendations.
- Instructional designers from participating institutions review program and course descriptions and objectives. Recommended changes are reviewed by faculty.
- The UBHE Technical Education Committee verifies proposals meet the intent of the initiative.
- Institutions may request the USHE Curriculum Committee and UBHE Technical Education Committee grant a waiver of alignment requirements with justification. The committee may approve variations of alignment.
- Proposals are submitted to the UBHE as an information item on the consent calendar.
- Program approval and modification requirements will be defined in USHE policy.

Timeline

FY22: For all programs with a regulatory body, state or national licensure, or with a third-party accreditation agency, the UBHE directed the alignment of program titles, lengths in clock-hours and credit-hours, descriptions, and objectives; and align required course numbers, titles, lengths in clock-hours and credit-hours, descriptions, and objectives. Programs are encouraged to identify and implement electives where necessary, as part of the program. Program titles, lengths in clock-hours and credit-hours, descriptions, and objectives for all other programs should also be aligned.

FY23: For all programs which have a regulatory body, state or national licensure, or generally have a third-party accreditation agency, committees are expected to complete implementation of FY22 alignment activities, including identification and implementation of electives, where necessary. For all other programs, alignment of required course numbers, titles, lengths in clock-hours and credit-hours, descriptions, and objectives should be achieved with the identification and implementation of elective courses where necessary.

FY24: Complete the implementation of FY23 alignment activities.

Progress Report

Committee members are asked to review this document, the progress report, and single institution and aligned program proposals prior to the meeting. An overview of the initiative progress will be presented to the committee and single institution and aligned program proposals will be presented for discussion.

Commissioner's Recommendation

The Commissioner recommends the committee forward single institution and aligned programs to the Committee of the Whole as an information item.

Attachment



Utah System of Higher Education
Advanced Emergency Medical Technician
FY2023 / 6 Credits (186 Clock-Hours)

Advanced Emergency Medical Technician			
Institutions: Davis, Dixie, Mountainland, Salt Lake, Southwest			
<i>Certificate of Program Completion (Catalog Year: 2023, 6 Credits/186 Clock-Hours Required, CIP: 51.0904)</i>			
Core (6 Credits/186 Clock-Hours)		Credits	Clock-Hours
PREF XXXX	Advanced Emergency Medical Technician	6	186



Utah System of Higher Education

Advanced Emergency Medical Technician

FY2023 / 6 Credits (186 Clock-Hours)

Program Description

Advanced Emergency Medical Technicians provide basic and limited advanced emergency medical care and transportation of critical and emergent patients who access the emergency medical system (EMS). Advanced Emergency Medical Technicians (AEMTs) possess the fundamental knowledge and skills necessary to provide patient care and transportation. Advanced Emergency Medical Technicians function as part of a comprehensive EMS response, under medical oversight. Advanced Emergency Medical Technicians perform interventions with the basic and advanced equipment typically found on an ambulance. Advanced Emergency Medical Technicians function as a link between the scene and the emergency health care system.

Objectives:

Upon program completion, students will be able to:

- Demonstrate fundamental skills and knowledge of the following areas: the EMS system, the safety/well-being of the AEMT, and the medical, legal, and ethical issues to the provision of emergency care
- Integrate complex knowledge of the anatomy and physiology of the airway, respiratory, and circulatory systems to the practice of EMS
- Use foundational anatomical and medical terms and abbreviations in written and oral communication with colleagues and other health care professionals
- Apply comprehensive knowledge of the pathophysiology of respiration and perfusion to patient assessment and management
- Apply fundamental knowledge of lifespan development to patient assessment and management
- Utilize the foundational principles of the role of EMS during public health emergencies
- Apply (to patient assessment and management) fundamental knowledge of the medications carried by AEMTs that may be administered to a patient during an emergency
- Apply knowledge (fundamental depth, foundational breadth) of anatomy and physiology to patient assessment and management in order to assure a patient airway, adequate mechanical ventilation, and respiration for patients of all ages
- Interpret scene information and patient assessment findings (scene size-up, primary and secondary assessment, patient history, reassessment) to guide emergency management
- Provide basic and selected advanced emergency care and transportation based on assessment findings for an acutely ill patient
- Provide basic and selected advanced emergency care and transportation based on assessment findings for a patient in shock, respiratory failure or arrest, cardiac failure or arrest, and post-resuscitation management
- Provide basic and selected advanced emergency care and transportation based on assessment findings for an acutely injured patient
- Utilize principles of growth, development, aging, and assessment findings to provide basic and selected advanced emergency care and transportation for a patient with special needs
- Perform in accordance with operational roles and responsibilities to ensure patient, public, and personnel safety when responding to an emergency

COURSE DESCRIPTIONS

Advanced Emergency Medical Technician

6 Credits/186 Clock-Hours

Advanced Emergency Medical Technicians provide basic and limited advanced emergency medical care and transportation for critical and emergent patients who access the emergency medical system (EMS). Advanced Emergency Medical Technicians (AEMTs) possess the basic knowledge and skills necessary to provide patient care and transportation. Advanced Emergency Medical Technicians function as part of a comprehensive EMS response, under medical oversight. Advanced Emergency Medical Technicians perform interventions with the basic and advanced equipment typically found on an ambulance. The Advanced Emergency Medical Technician is a link from the scene to the emergency health care system. This course includes 6 hours of externship hours to be completed outside of the classroom time.

Objectives:

- Demonstrate fundamental skills and knowledge of the following areas: the EMS system, the safety/well-being of the AEMT, and the medical, legal, and ethical issues to the provision of emergency care
- Integrate complex knowledge of the anatomy and physiology of the airway, respiratory, and circulatory systems to the practice of EMS
- Use foundational anatomical and medical terms and abbreviations in written and oral communication with colleagues and other health care professionals
- Apply comprehensive knowledge of the pathophysiology of respiration and perfusion to patient assessment and management
- Apply fundamental knowledge of lifespan development to patient assessment and management
- Utilize the foundational principles of the role of EMS during public health emergencies
- Apply (to patient assessment and management) fundamental knowledge of the medications carried by AEMTs that may be administered to a patient during an emergency
- Apply knowledge (fundamental depth, foundational breadth) of anatomy and physiology to patient assessment and management in order to assure a patient airway, adequate mechanical ventilation, and respiration for patients of all ages
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- Provide basic and selected advanced emergency care and transportation based on assessment findings for an acutely ill patient
- Provide basic and selected advanced emergency care and transportation based on assessment findings for a patient in shock, respiratory failure or arrest, cardiac failure or arrest, and post-resuscitation management
- Provide basic and selected advanced emergency care and transportation based on assessment findings for an acutely injured patient
- Utilize principles of growth, development, aging, and assessment findings to provide basic and selected advanced emergency care and transportation for a patient with special needs
- Perform in accordance with operational roles and responsibilities to ensure patient, public, and personnel safety when responding to an emergency



Utah System of Higher Education

Animal Sciences

FY2023 / 18 Credits (600 Clock-Hours)

Animal Sciences			
Institutions: Bridgerland			
<i>Certificate of Program Completion (Catalog Year: 2023, 18 Credits/600 Clock-Hours Required, CIP: 01.8301)</i>			
Core (18 Credits/600 Clock-Hours)		Credits	Clock-Hours
ANSC 1011	Introduction to Veterinary Tech	2	60
ANSC 1111	Patient Mgmt and Nutrition	3	90
ANSC 1201	Vet Assist Clinical Sciences	1	30
ANSC 1301	Vet Assisting Applications	1	30
ANSC 1401	Emergency Critical Care/End of Life	1	30
ANSC 1501	Clinical Procedures I	1	30
ANSC 1502	Clinical Procedures II	2	60
ANSC 1503	Clinical Procedures III	3	90
ANSC 2999	Clinical Externship	4	180
TOTALS		18	600



Utah System of Higher Education

Animal Sciences

FY2023 / 18 Credits (600 Clock-Hours)

PROGRAM DESCRIPTION

Animal Sciences provides students with hands-on training to develop the skills needed to work as support staff in veterinary clinics, shelters, or other animal-based institutions. Skilled and experienced instructors with unique animal sciences backgrounds provide real-world training in relevant topics such as animal restraint, nursing care, radiology, lab procedures, blood collection, IV catheterization, dental cleanings, vaccines, physical exams, and client services. Students will also train on front office procedures. This program supports the Bridgerland Technical College mission to deliver competency-based, employer-guided career and hands-on technical education to the Bear River Region.

Objectives:

- Graduates will safely and successfully restrain and work with a variety of small and large animals.
- Graduates will demonstrate proficiency in nursing care, laboratory procedures, dental cleanings, IV catheterization, vaccinations, and physical exams.
- Graduates will perform routine lab procedures including blood collection, fecals, and infection control.
- Graduates will demonstrate knowledge of veterinary terminology and pharmacology in communication with faculty, veterinarians, and other veterinary staff.

COURSE DESCRIPTIONS

Introduction to Veterinary Tech

2 Credits/60 Clock-Hours

This course provides a fundamental understanding of what a veterinarian assistant/pre-technician professional does to assist a veterinarian and other veterinary staff while helping animals in need.

Objectives:

- Understand career expectations of veterinarian assistants.
- Identify ethical and legal issues in veterinary care.
- Learn proper safety techniques.
- Practice animal management and human interaction.
- Learn medical terminology as it pertains to animal sciences.

Patient Mgmt and Nutrition

3 Credits/90 Clock-Hours

This basic science course introduces students to essential skills needed to maintain gainful and satisfying employment in veterinarian assisting careers. Students will learn anatomy, physiology, nutrition, medical treatments, and animal behavior.

Objectives:

- Demonstrate knowledge of anatomy and physiology.
- Understand nutritional needs of various animal species.
- Utilize problem-solving skills.
- Understand safe, competent, and individualized care to patients.
- Correctly perform medical calculations.
- Understand animal behaviors.

Vet Assist Clinical Sciences

1 Credits/30 Clock-Hours

This course provides students with knowledge and skills used in clinical settings for diagnosis and care of many conditions and diseases found in a variety of animal species.



Utah System of Higher Education

Animal Sciences

FY2023 / 18 Credits (600 Clock-Hours)

Objectives:

- Understand hematology, hemostasis processes, and clinical chemistry.
- Demonstrate appropriate knowledge of microbiology, cytology, and urinalysis.
- Understand pathology and pharmacology in animals.
- Recognize parasites, their hosts, and the relationship between them.
- Demonstrate knowledge of preventive medicine as it relates to animal sciences.
- Understand procedures for diagnostic imaging.
- Understand procedures for anesthesia and perioperative analgesia.

Vet Assisting Applications

1 Credits/30 Clock-Hours

This course provides students opportunity to practice veterinarian assisting skills in the classroom and practice laboratory.

Objectives:

- Demonstrate physical restraint.
- Collect accurate patient history.
- Assist in physical examinations.
- Demonstrate skills used in surgical nursing.
- Perform accurate diagnostic imaging.

Emergency Critical Care/End of Life

1 Credits/30 Clock-Hours

This course introduces students to a variety of domesticated animals treated in a veterinarian practice. Students will learn to recognize and address the physical condition of an animal and begin the care process for a sick or wounded patient.

Objectives:

- Identify emergency situations and required critical care.
- Demonstrate management of wounds, fractures, and other injuries.
- Demonstrate procedures for fluid therapy and blood transfusions.
- Demonstrate knowledge of animal dentistry.
- Provide care of cats and dogs including general grooming.
- Demonstrate care of horses.
- Correctly identify breeds of cats, dogs, and horses.
- Demonstrate care of food animals.
- Demonstrate care of birds, reptiles, amphibians, and small mammals.

Clinical Procedures I

1 Credits/30 Clock-Hours

This course provides students an introduction to basic skills in the classroom and practice laboratory. Students learn skills required in the animal care process and learn how to manage care for patients with uncomplicated conditions.

Objectives:

- Develop office skills involving scheduling, greeting, and following up with clients.
- Develop safe handling skills with needles/syringes.
- Demonstrate proper animal restraint techniques on common animal species.



Utah System of Higher Education

Animal Sciences

FY2023 / 18 Credits (600 Clock-Hours)

- Perform subcutaneous injections on live animals.
- Perform eye dissection.
- Perform heart and lung dissection.
- Demonstrate techniques for sperm evaluation, vaginal smears, and semen handling.
- Identify proper tube feeding techniques.
- Identify common pharmaceuticals used with animal treatment.
- Demonstrate animal hardware use (collars, carriers, muzzles, bags, gloves, etc).
- Obtain CPR certification.

Clinical Procedures II

2 Credits/60 Clock-Hours

This course provides students an introduction to skills in the classroom and practice laboratory. Students build on skills learned in Clinical Procedures I that are required in the animal care process.

Objectives:

- Demonstrate correct animal restraint.
- Demonstrate appropriate and accurate use of laboratory equipment.
- Collect blood sample for various species.
- Perform accurate complete blood counts (CBC), white blood counts (WBC), and Hematocrit counts.
- Demonstrate use of a refractometer.
- Perform Elisa tests.
- Demonstrate collection of tissue samples, masses, and skin scraping.
- Accurately prepare slides (blood, tissue, masses).
- Collect and evaluate urine.
- Collect and evaluate fecal samples (smear, tape, floatation, centrifugal).
- Correctly identify common parasites.
- Administer vaccines to various animal species.
- Demonstrate IV and IM injections.
- Demonstrate surgical preparation procedures for various animal species.
- Demonstrate preparation and sterile handling of surgical instrument packs.

Clinical Procedures III

3 Credits/90 Clock-Hours

This course provides students opportunity to strengthen animal care skills in the practice laboratory. Students build on skills learned in Clinical Procedures I and II that are required in the animal care process.

Objectives:

- Demonstrate appropriate grooming procedures for dogs and cats (including bathing, nails, ears, and expressing canine anal glands).
- Demonstrate procedures used in ophthalmic treatments.
- Demonstrate IV catheterization.
- Perform common bandaging.
- Demonstrate correct animal restraint various species.
- Understand specialized care treatments for birds (wings, nails, beaks).
- Understand specialized care treatments for wildlife.
- Interact comfortably with variety of small mammals.
- Perform feline dissection.



Utah System of Higher Education

Animal Sciences

FY2023 / 18 Credits (600 Clock-Hours)

Clinical Externship

4 Credits/180 Clock-Hours

This is the clinical course where students demonstrate application of knowledge and skills they have obtained from the classroom and laboratory experiences. This course provides 180 hours of clinical experience in actual veterinarian animal care settings.

Objectives:

- Understand interrelationship of veterinary team as a unit.
- Demonstrate office skills involving scheduling, greeting, and following up with clients.
- Collect accurate patient history.
- Assist in physical examinations.
- Demonstrate problem-solving skills.
- Understand safe, competent, and individualized care to patients.
- Demonstrate correct medical calculations.
- Demonstrate safe handling skills with needles/syringes.
- Demonstrate proper animal restraint techniques on common animal species.
- Perform injections on animals (SQ, IM, IV).
- Administer vaccines to various animal species.
- Demonstrate skills used in surgical nursing.
- Perform accurate diagnostic imaging.
- Demonstrate appropriate and accurate use of laboratory equipment.
- Collect blood sample for various species.
- Demonstrate use of a refractometer.
- Understand and utilize Elisa tests.
- Demonstrate collection of tissue samples, masses, and skin scraping.
- Accurately prepare slides (blood, tissue, masses).
- Collect and evaluate urine.
- Collect and evaluate fecal samples (smear, tape, floatation, centrifugal).
- Correctly identify common parasites.
- Demonstrate surgical preparation procedures for various animal species and procedures.
- Demonstrate preparation and sterile handling of surgical instrument packs.
- Demonstrate appropriate grooming procedures for dogs and cats (including bathing, nails, ears, and expressing canine anal sacs).
- Demonstrate procedures used in ophthalmic treatments.
- Demonstrate IV catheterization.
- Perform common bandaging.



Utah System of Higher Education

Controls Engineering Technology
FY2023 / 20 Credits (600 Clock-Hours)

Controls Engineering Technology			
Institutions: Bridgerland			
<i>Certificate of Program Completion (Catalog Year: 2023, 20 Credits/600 Clock-Hours Required, CIP: 47.0303)</i>			
Core (14 Credits/420 Clock-Hours)		Credits	Clock-Hours
CTRL 2000	Industrial Networking Basics	1	30
CTRL 2050	Vision Systems Basic	1	30
CTRL 2100	Programmable Logic Controllers 2	3	90
CTRL 2150	Human Machine Interface (HMI) Programming	2	60
CTRL 2200	Industrial Networking Lab	2	60
CTRL 2250	Servo Motors and Drives	1	30
CTRL 2800	Integration Capstone	4	120
Elective (6 Credits/180 Clock-Hours Required)		Credits	Clock-Hours
CTRL 2300	Programmable Logic Controllers 3	3	90
CTRL 2320	Vision Systems Advanced	1	30
CTRL 2420	Programmable Logic Controller Platforms	1	30
CTRL 2440	HMI Platforms	1	30
CTRL 2460	Robot Platforms	1	30
CTRL 2480	Vision Platforms	1	30
CTRL 2500	FANUC Basic Programming	1	30
CTRL 2550	FANUC ROBOGUIDE Simulation Software	2	60
CTRL 2620	Robot Vision and Safety	1	30
CTRL 2700	FANUC Advanced Programming	1	30
CTRL 2750	Manufacturing Analytics	2	60
CTRL 2901	Special Apps for Controls	6	180



Utah System of Higher Education

Controls Engineering Technology
FY2023 / 20 Credits (600 Clock-Hours)

PROGRAM DESCRIPTION

Controls Engineering Technology prepares qualified students for advanced work as Control System Technicians in an automated manufacturing environment. This certificate provides hands-on training in Programmable Logic Controllers (PLCs), industrial robots, industrial networking, servo system programming, vision systems, and HMI programming. The content of the competency-based curriculum is guided by the needs of local employers in the Bear River region. Prerequisite: successful completion of the Automated Manufacturing certificate, a related associate's or higher (from a nationally or regionally accredited institution as approved by the Department Head), or related industry experience (as approved by the Department Head). This program supports the Bridgerland Technical College mission to deliver competency-based, employer-guided career and hands-on technical education to the Bear River Region.

Objectives:

- A graduate will demonstrate the ability to build an operational industrial network containing computers and control devices.
- A graduate will demonstrate the ability to program a process using a common PLC.
- A graduate will demonstrate the ability to design and program an HMI screen to interface with a PLC and control a process.
- A graduate will demonstrate the ability to program a servo-driven process with a PLC.
- A graduate will demonstrate the ability to identify, locate, communicate with other devices, and inspect two different parts using machine vision.
- A graduate will demonstrate the ability to successfully build a project that integrates multiple control topics.

COURSE DESCRIPTIONS

Industrial Networking Basics

1 Credits/30 Clock-Hours

This course is designed to help students understand important Ethernet and TCP/IP concepts and terminology. It will also provide essential information about the industrial protocols and topology. Students will gain a solid grasp of Ethernet basics and the concepts required for an Industrial network. The course includes switch configuration, power over Ethernet, addressing, and wireless Ethernet.

Objectives:

- Describe basic network configuration.
- Use basic networking hardware, software, and tools.
- Describe common networking communications protocols.
- Use Power over Ethernet (PoE) in a network application.
- Build and test Ethernet cables.
- Configure a wireless access point.
- Discover and assign Internet Protocol (IP) addresses for various industrial control components.
- Set up a complete Industrial Ethernet network.

Vision Systems Basic

1 Credits/30 Clock-Hours

This course focuses on the Cognex Insight Easy Builder and Spreadsheet application interface with an additional emphasis on lighting, lenses, and filters. With the focus on getting the most from the In-Sight Explorer spreadsheets interface, users learn how to walk through the process of setting up a vision application using spreadsheet programming best practices. Students will learn to use advanced tools and tools recently added to the spreadsheet environment.

Objectives:

- Identify vision hardware and connections.



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- Convert pixels to common measurements using calibration tools.
- Setup software interface and acquire first images.
- Identify parts using pattern matching and Logic.
- Identify presence or absence of feature using histogram tools.
- Identify part edges using edge tools.
- Identify irregular shapes using blob tools and image filters.
- Configure input and output signals then demonstrate their use.
- Send process results to external devices.
- Create custom interface for pass/fail results.
- Deploy application using simple interface and advanced interface.
- Demonstrate use of multiple lighting principles and techniques.

Programmable Logic Controllers 2

3 Credits/90 Clock-Hours

This course will introduce Studio 5000 Logix Designer (previously known as RSLogix 5000) and the CompactLogix PLC. Students will program using ladder logic for multiple labs based on industrial applications. Students will be required to wire, program, and troubleshoot various systems. Students will program a process on an actual machine as the final project.

Objectives:

- Connect to and configure a Programmable Logic Controller (PLC) using PLC programming software.
- Use tags, subroutines, data types, arrays, and sequencer code structure in programmable controller programming.
- Use input and output instructions, timers, counters, math instructions, and compare instructions in programmable logic controller programming.
- Connect and configure input and output (I/O) expansion cards, both local and remote.
- Demonstrate proper PLC wiring.
- Program a complete process from scratch.

Human Machine Interface (HMI) Programming

2 Credits/60 Clock-Hours

Human-Machine Interface (HMI) operator stations have become commonplace in modern industry because they eliminate wiring, enable operator functions to be modified in software, and provide the ability for the operator to monitor PLC operations data. Students will learn how to convert a Programmable Logic Controller program into a graphic Human Machine Interface Panel. Training will cover major topic areas including application editing, tags and communications, creating data logs, input and output objects, local messages and alarms, diagnostics, and information messages. Prerequisite: CTRL2100 Programmable Logic Controllers 2.

Objectives:

- Describe the use and need for Human Machine Interface (HMI) in an automation environment.
- Interface an HMI with a Programmable Logic Controller (PLC) to simulate a virtualized system.
- Create graphic displays.
- Build and animate an interactive graphic display.
- Configure HMI tag-based alarms.
- Create and configure a historical trend.
- Create and view a data log model.
- Use a graphic HMI panel to control a process on an actual machine.



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Industrial Networking Lab

2 Credits/60 Clock-Hours

Device communication can be one of the most challenging aspects of any automated system. In this course, students will network PLCs, remote I/O blocks, sensor systems, servo drives, and robots so they are able to consistently pass information between devices. Prerequisites: AMAR 1700 Introduction to Industrial Robotics, CTRL2000 Industrial Networking Basics, CTRL2050 Vision Systems Basic, CTRL2100 Programmable Logic Controllers 2, CTRL2150 HMI Programming (Recommended: CTRL2500 Fanuc Basic Programming and CTRL2700 Fanuc Advanced Programming)

Objectives:

- Apply Industrial Networking concepts to devices used in industry.
- Set up industrial grade networking hardware.
- Configure network communication between Programmable Logic Controllers (PLCs), input and output (I/O) blocks, sensor systems, servos, and robots.
- Use standard PLC sequencer logic to control a process.
- Wire I/O and PLC network connections.
- Set up a remote connection to a PLC.

Servo Motors and Drives

1 Credits/30 Clock-Hours

Introduces servomechanisms to the student. Covers the basic operation of a motion control application. Students will program a servo drive and motor to perform basic motion commands. This course will be directed to configuration and tuning of motion control applications. Students will wire and program an electric motor drive to be self-controlled within a process. Prerequisite: CTRL2150 HMI Programming.

Objectives:

- Describe the components of a servomechanism.
- Use a network to connect a PLC to motion control modules.
- Configure motion modules in a Programmable Logic Controller (PLC).
- Write a PLC program to perform motion control.
- Write a PLC program to perform motion control with multiple axes.

Integration Capstone

4 Credits/120 Clock-Hours

This course will involve many aspects of an industrial control system. Students must complete a high skill level project. Students may be required to design, draw schematics, create flow charts, write progress reports, program a robot, program a Programmable Logic Controller (PLC), program servos, wire devices, or present for their capstone project. This may also include safety systems, risk assessments, and code diagrams. Students may be required to integrate the following items: PLC, HMI, servo drive, network switch, vision system, safety system, and industrial robotic arm. Instructor approval is required for the final project. Working students may propose an on-the-job project contingent on instructor and employer approval.

Objectives:

- Demonstrate advanced troubleshooting techniques
- Build a project using advanced programming in one or more of the following: Programmable Logic Controllers (PLC), Human Machine Interface (HMI), robots, servos, safety equipment, industrial networking equipment.
- Demonstrate a structured coding method.
- Report the project while following instructor reporting requirements.



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Controls Engineering Technology
FY2023 / 20 Credits (600 Clock-Hours)

ELECTIVE COURSES

Programmable Logic Controllers 3

3 Credits/90 Clock-Hours

This course will expand on the Programmable Logic Controller 2 course. This course will cover operation and application of safety programmable logic controllers, safety relays, safety I/O and risk assessments. Students will program a system using PID control methods. Students will be introduced to Structured Text and Function Block programming as well as Add-On instructions. Students will learn how to program using a structured programming method. Prerequisite: CTRL2100 Programmable Logic Controllers 2 and CTRL2150 HMI Programming

Objectives:

- Write a Programmable Logic Controller (PLC) program that uses the PID (Proportional Integral Derivative) method to control a process.
- Program a safety PLC using regular and safety I/O.
- Use an external safety relay in a PLC application.
- Perform a risk assessment.
- Use function block and structured text in basic PLC projects.
- Use Add-On Instructions (AOI) to enhance a PLC program.
- Program a PLC using a structured method.

Vision Systems Advanced

1 Credits/30 Clock-Hours

Vision systems are one of the most advanced tools in a technician's toolbox. Advances in deep learning for inspection and quality control applications, as well as character recognition, tool applications, and more advanced lighting techniques will be discussed and applied in this course. Prerequisite: CTRL2050 Vision Systems Basic

Objectives:

- Deploy VIDI deep learning tools.
- Apply advanced find tools.
- Identify text using OCR text recognition tools.
- Identify inconsistent/flexible features using advanced edge inspection tools.
- Identify unique colors using color tools.
- Build and execute a custom script.
- Apply advanced lighting including off axis, dome, lighting controllers, strobing.

Programmable Logic Controller Platforms

1 Credits/30 Clock-Hours

Students will choose a PLC platform and learn the software and hardware of that system. Students will learn to set up, configure and program this PLC in a variety of labs simulating industrial applications. Prerequisites: CTRL2100 Programmable Logic Controllers 2, CTRL2150 HMI Programming.

Objectives:

- Use a Programmable Logic Controller (PLC) from a selected manufacturer.
- Perform proper wiring between I/O and PLC on a selected platform.
- Perform PLC programming on a selected platform.
- Use PLC programming software to create and edit programs on a selected platform.

HMI Platforms

1 Credits/30 Clock-Hours

Students will choose a robot platform from a variety of available HMI systems and perform fundamental HMI tasks. With instructor guidance, students will need to be prepared to discover the interface, tools,



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and overall operation of the system from vendor provided manuals and resources. Prerequisites: CTRL2100 Programmable Logic Controllers 2, CTRL2150 HMI Programming.

Objectives:

- Use a Human Machine Interface (HMI) or Supervisory Control and Data Acquisition (SCADA) software from a selected manufacturer.
- Configure communication between the selected platform and a Programmable Logic Controller (PLC).
- Create graphic displays on a selected platform.
- Build and animate an interactive graphic display on a selected platform.

Robot Platforms

1 Credits/30 Clock-Hours

Students will choose a robot platform from a variety of available industrial robot systems and perform fundamental robotic tasks. With instructor guidance, students will need to be prepared to discover the interface, tools, and overall operation of the system from vendor provided manuals and resources.

Prerequisite: AMAR1700 Introduction to Industrial Robotics OR CTRL2500 Fanuc Basic Programming

Objectives:

- Power up and jog the robot.
- Recover from common program and robot faults.
- Execute production operations.
- Create, modify, and execute a material handling program.
- Monitor, force, and simulate Input and Output signals.
- Backup and restore individual programs and files.

Vision Platforms

1 Credits/30 Clock-Hours

Students will choose a vision platform from available industrial vision systems and perform fundamental tasks using that system. With instructor guidance, students will need to be prepared to discover the interface, tools, and overall operation of the system from vendor provided manuals and resources.

Prerequisite: CTRL2050 Vision Systems Basic.

Objectives:

- Identify vision hardware and connections.
- Convert pixels to common measurements using calibration tools.
- Setup software interface and acquire first images.
- Identify parts using pattern matching and Logic.
- Identify presence or absence of feature using histogram tools.
- Identify part edges using edge tools.
- Identify irregular shapes using blob tools and image filters.
- Configure input and output signals then demonstrate their use.
- Send process results to external devices.
- Create custom interface for pass/fail results.
- Deploy application using simple interface and advanced interface.

FANUC Basic Programming

1 Credits/30 Clock-Hours

The course covers the tasks that an operator, technician, engineer, or programmer needs to set up and program a FANUC Robotics Handling Tool Software Package. Students will practice hands-on pendant labs with industrial grade FANUC LR Mate 200i D manipulators and FANUC System R-30i B Mate Controllers. Prerequisite: AMAR1700 Introduction to Industrial Robotics.



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FY2023 / 20 Credits (600 Clock-Hours)

Objectives:

- Power up and Jog the robot using multiple coordinate systems.
- Recover from common program and robot faults.
- Execute production operations.
- Create, modify, and execute a material handling program.
- Create and execute MACROs.
- Monitor, Force, and Simulate Input and Output Signals.
- Apply positional offsets in a material handling operation.
- Backup and restore individual programs and files.

FANUC ROBOGUIDE Simulation Software

2 Credits/60 Clock-Hours

This course will provide procedures for creating a HandlingPRO virtual workcell. When completed, the workcell created will contain a FANUC robot with end-of-arm tooling, one or more fixtures for holding a part, and a robot TPP Program which moves the part from one fixture to the other. Prerequisite: CTRL2500 FANUC Basic Programming.

Objectives:

- Create a new workcell.
- Edit the robot properties.
- Add a part and objects to the workcell.
- Add End-of-arm Tooling to the robot.
- Add a pick fixture to the workcell.
- Add a place fixture to the workcell.
- Create a robot program.
- Create a program using Draw Features on Part.
- Run the programs.
- Use Task Profiler to analyze program run.
- Create a program to pick and place random parts.
- Create an AVI of the workcell.
- Add a second robot to the workcell.
- Setup extended axis and add 2nd & 3rd motion group, then create machines for the 7th axis and motion groups.
- Create a program that will trace lines and move blocks.

Robot Vision and Safety

1 Credits/30 Clock-Hours

This course covers the basic tasks and procedures required for an operator, technician, engineer, or programmer to set up, teach, test, and modify iRVision applications and FANUC Dual Check Safety (DCS) software. Upon successful completion of this course, students can identify the components of a vision system, install vision hardware, develop an application, program the robot, perform error recovery procedures, and follow recommended safety practices. Prerequisite: CTRL2500 FANUC Basic Programming.

Objectives:

- View and/or change robot and computer parameters to facilitate access to the robot's web page.
- Set up a camera.
- Perform an inspection vision process.
- Understand basic vision concepts and lighting.
- Master a robot using vision mastering.
- Create tool frame for the robot applicator.



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- Create user frames necessary for use with the vision system.
- Calibrate a camera.
- Set up a 2D single-view vision process.
- Program the robot to respond to vision results.
- Understand the DCS menus.
- Set up and Modify DCS General parameters.
- Set up position check functions.
- Recover from DCS alarm.
- Modify DCS Zone Checks.
- Setup Stop Position Prediction.
- Create User Models and User Frames.
- Set up and modify Speed Check parameters.
- Set up and Modify DCS Safe I/O parameters.

FANUC Advanced Programming

1 Credits/30 Clock-Hours

Advanced programming is the next step after a basic programming class. Topics from the previous classes will be used in this class to develop a more complex scenario. Students will be given a hypothetical example workcell. They will then be given the task of creating all the necessary programs to deal with multifaceted issues using advanced programming techniques. Prerequisite: CTRL2500 FANUC Basic Programming.

Objectives:

- Manipulate frames related to programming issues.
- Demonstrate advanced program control structures.
- Establish PLC Robot communication using User Operator Panel.
- Master the robot.
- Establish Ethernet communication.
- Set payload and payload change.
- Set tool frame offsets.
- Apply reference positions.
- Pull parts through a predefined system.
- Set up multi-tasking operations.
- Design and implement methods for Error Recovery.

Manufacturing Analytics

2 Credits/60 Clock-Hours

This course will provide students with experience working with data as a control systems technician. Students will become familiar with the types of tasks which will be required of control systems technicians working with data in manufacturing. Students will learn several manufacturing data concepts while using multiple sets of data based on real-world scenarios, and apply the principles learned using real world systems.

Objectives:

- Analyze data from multiple real-world manufacturing scenarios for multiple real-world manufacturing purposes.
- Present findings using an Human Machine Interface (HMI) or a Data Visualization program.
- Setup data transfer from a Programmable Logic Controller (PLC)-driven manufacturing system to a database table or spreadsheet.



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Controls Engineering Technology
FY2023 / 20 Credits (600 Clock-Hours)

Special Apps for Controls

6 Credits/180 Clock-Hours

This course provides students unique controls skill development identified as an immediate need in the current occupational industry or as needed for prerequisite training in the Controls Engineering Technology certificate. Specific course objectives will be documented and when possible, a descriptive title will be provided for the student transcript. Credit will be given in 30 hour increments up to a maximum of 180 hours.

Objectives:

- These will be determined on an individual course basis and will be made known to the student upon instructor approval of the course to be taken or the skill to be developed.



Utah System of Higher Education

Data Analytics

FY2023 / 15 Credits (450 Clock-Hours)

Data Analytics			
Institutions: Bridgerland			
<i>Certificate of Program Completion (Catalog Year: 2023, 15 Credits/450 Clock-Hours Required, CIP: 30.7101)</i>			
Core (11 Credits/330 Clock-Hours)		Credits	Clock-Hours
DATA 1010	SQL Fundamentals	2	60
DATA 1020	Data Visualization Fundamentals	2	60
DATA 1030	Python Programming	3	90
DATA 1040	Advanced Python for Data Analytics	2	60
DATA 2050	Capstone Project I	2	60
Core (4 Credits/120 Clock-Hours Required)		Credits	Clock-Hours
BTEC 2140	Spreadsheets II	2	60
DATA 1035	Machine Learning (Python)	2	60
DATA 1050	Web Marketing Analytics	2	60
DATA 1065	Manufacturing Analytics	2	60
DATA 1070	R for Data Analytics	2	60
DATA 2010	Advanced SQL	2	60
DATA 2020	Advanced Data Visualization	2	60
DATA 2055	Capstone Project II	2	60
DATA 2901	Special Applications	4	120
DATA 2999	Externship	3	135



Utah System of Higher Education

Data Analytics

FY2023 / 15 Credits (450 Clock-Hours)

PROGRAM DESCRIPTION

Data Analytics prepares both experienced and inexperienced students with the necessary skills to become skilled data practitioners in business, manufacturing, management, and marketing environments. The self-paced, competency-based curriculum provides extensive hands-on training, text work, computer simulation, and one-on-one teacher to student training. This certificate introduces students to the knowledge, skills, abilities, and tools relevant to data analytics such as: initiating data projects, sourcing data, transforming data, analyzing data, and presenting data. This program supports the Bridgerland Technical College mission to deliver competency-based, employer-guided career and hands-on technical education to the Bear River Region.

Objectives:

- A graduate will demonstrate the ability to perform gap analyses on data sets, identify missing/appropriate data in order to solve business problems.
- A graduate will demonstrate the ability to extract, collect, clean, and test data.
- A graduate will demonstrate the ability to transform data by merging and splitting data sets in addition to creating new variables.
- A graduate will demonstrate the ability to analyze data by applying questions to data, separating anomalies, and running tests.
- A graduate will demonstrate the ability to communicate data stories through the production and reporting of clear data visualizations, dashboards, reports, charts, graphs, and animations.
- A graduate will demonstrate how to keep data safe and secure.
- A graduate will demonstrate the ability to create and maintain databases.

COURSE DESCRIPTIONS

SQL Fundamentals

2 Credits/60 Clock-Hours

This course will familiarize students with concepts of relational databases and how to access this data using SQL queries. Students will learn how to pull and process data. A series of database application projects will teach students to pull data, filter data, aggregate data, and join data. Students will also learn how to restore a database and save queried data to a database. They will also learn basic navigation within the database. Students will build working knowledge and hands-on familiarity with SQL using Microsoft SQL Server.

Objectives:

- Connect to a SQL Server.
- Source data from a SQL server.
- Use basic queries, filters, and joins to pull relevant data.

Data Visualization Fundamentals

2 Credits/60 Clock-Hours

This course teaches key principles in analyzing data using visualizations and presenting data to a client. Students will learn foundational principles of data visualization and telling a story using data. They will then learn more advanced data visualization techniques through Tableau and Microsoft Power BI data visualization software.

Objectives:

- Apply principles of visualization to tell an informative story using data.
- Produce basic visualizations using data visualization software.
- Demonstrate proficiency in pulling data from a SQL database into data visualization software.
- Demonstrate the ability to produce different visualizations using data from a SQL database.



Utah System of Higher Education

Data Analytics

FY2023 / 15 Credits (450 Clock-Hours)

Python Programming

3 Credits/90 Clock-Hours

This course introduces the Python programming language. Topics include basic Python syntax, procedural programming concepts, data types (lists and dictionaries), decision and control structures, functions, and file I/O. Students will also be introduced to using the NumPy library to execute multidimensional mathematical operations on data, and conduct basic statistical analysis.

Objectives:

- Install Python.
- Write basic Python code to structure, clean, and analyze data.
- Use file I/O to import data.
- Use basic statistical functions from the NumPy library to analyze data.

Advanced Python for Data Analytics

2 Credits/60 Clock-Hours

This course builds upon the principles taught in Python Programming. Students will learn to access a SQL database using Python. They will build on their knowledge of the NumPy library and extend their knowledge of Python with common Python libraries essential for data analytics including regex and pandas. Students will use these libraries to source, clean, transform, and analyze data from a SQL database.

Objectives:

- Write code that uses regular expressions to extract and manipulate text data.
- Import and export data using pandas.
- Create, manipulate, and filter data frames using pandas.
- Generate summary statistics to quickly analyze data using pandas.

Capstone Project I

2 Credits/60 Clock-Hours

In this course, students will select their own dataset and go through the complete data life cycle. They will collect, clean, transform, analyze, and visualize data using the tools and techniques learned throughout the program. They will then present their findings using a visualization tool of their choice.

Objectives:

- Apply techniques learned throughout the program to collect, clean, transform, analyze, and visualize real world data.
- Present findings using a visualization tool.

ELECTIVES (4 Credit hours/120 Clock-hours Required)

Spreadsheets II

2 Credits/60 Clock-Hours

Spreadsheets Apps II is a continuation from Microsoft Spreadsheets I and is designed to provide students with an advanced knowledge of formatting techniques, spreadsheet functions, analysis tools, and management techniques.

Objectives:

- Apply advanced formatting techniques, functions, and formulas.
- Create, format, and filter Tables and PivotTables.
- Use data analysis features to create scenarios, reports, and variable data tables.
- Protect and share worksheets and workbooks.
- Automate repetitive tasks and customize Excel workbooks.
- Import, export, and distribute data.



Utah System of Higher Education

Data Analytics

FY2023 / 15 Credits (450 Clock-Hours)

Machine Learning (Python)

2 Credits/60 Clock-Hours

This course teaches the basics of machine learning using the Python library SKLearn. Students will learn to pre-process data, differences between various algorithms, and ways to validate a model. The course will also introduce students to some complications that arise when interpreting the output of a machine learning model.

Objectives:

- Demonstrate a knowledge of the differences between major machine learning algorithms.
- Use Python to pre-process data in preparation for use in machine learning.
- Train multiple machine learning models using real-world data.
- Use accepted methods of model validation.

Web Marketing Analytics

2 Credits/60 Clock-Hours

This course will provide students with experience working as a data practitioner in the field of web marketing. They will become familiar with the types of tasks which will be required of data practitioners working in manufacturing. Students will go through the data life cycle with multiple sets of data based on real-world scenarios.

Objectives:

- Apply techniques learned throughout the program on data sets from the field of web marketing.
- Analyze data from multiple real-world scenarios.
- Use visualizations to describe the data and present findings.

Manufacturing Analytics

2 Credits/60 Clock-Hours

This course will provide students with experience working as a data practitioner in the field of manufacturing. They will become familiar with the types of tasks which will be required of data practitioners working in manufacturing. Students will go through the data life cycle with multiple sets of data based on real-world scenarios.

Objectives:

- Apply techniques learned throughout the program on data sets from the field of manufacturing.
- Analyze data from multiple real-world scenarios.
- Present findings using a visualization tool.
- Setup data transfer from a PLC-driven manufacturing system to a database using Kepware.
- Analyze data in a manufacturing optimization scenario.
- Analyze data in a manufacturing predictive maintenance scenario.

R for Data Analytics

2 Credits/60 Clock-Hours

This course will teach basic statistical analysis and visualization techniques using R. The course will begin with installing R. Students will then learn R syntax and how it differs from Python and other languages. Students will also learn file I/O, data manipulation, and a variety of visualization techniques.

Objectives:

- Learn the basics of coding in R.
- Import data into R.
- Manipulate data using dplyr.
- Visualize data in tidyverse.



Utah System of Higher Education

Data Analytics

FY2023 / 15 Credits (450 Clock-Hours)

Advanced SQL

2 Credits/60 Clock-Hours

The course is designed to build familiarity with E-R database modeling, database creation, database maintenance, and database optimization. Database architectures including the client/server model and distributed database model are presented.

Objectives:

- Create a SQL database using (industry standard software).
- Structure a database using industry optimization techniques.
- Insert data into a student created database.

Advanced Data Visualization

2 Credits/60 Clock-Hours

This course will teach advanced Tableau and Power BI options for managing, processing, analyzing, and visualizing data. Students will learn advanced techniques to import and manipulate data. They will also create, format, and annotate visualizations.

Objectives:

- Import data from a live SQL database into Tableau and Power BI.
- Create visualizations that tell a story about data using Tableau and Power BI.
- Use annotation tools.

Capstone Project II

2 Credits/60 Clock-Hours

Students will expand their Capstone Project by further refining a stage(s) in the data life cycle such as: data collection, data cleaning, data transformation, data visualization, and/or data storytelling. They will then present how they expanded upon their data project from Capstone I.

Objectives:

- Apply techniques learned throughout the program to collect, clean, transform, and analyze real world data.
- Present findings using a visualization tool.

Special Applications

4 Credits/120 Clock-Hours

This course gives students the opportunity to apply what they have learned in an industry setting. Specific course competencies will be documented. Course length is not to exceed 120 hours.

Objectives:

- Course objectives will be determined on an individual course basis according to the specific knowledge, skill, or ability desired by the student. All course objectives, outcomes, and hours are subject to approval by the Data Analytics' program department head.

Externship

3 Credits/135 Clock-Hours

Students will gain real-world experience by applying classroom knowledge such as data collection, data cleaning, data transformation, data visualization, and/or data storytelling into a non-simulated work environment. Work-based activities will be provided by the cooperating business.

Objectives:

- Apply techniques learned throughout the program to collect, clean, transform, and analyze real world data.
- Present findings using a visualization tool.



Utah System of Higher Education
Fashion Merchandising and Development
FY2023 / 30 Credits (900 Clock-Hours)

Fashion Merchandising and Development			
Institutions: Bridgerland			
<i>Certificate of Program Completion (Catalog Year: 2023, 30 Credits/900 Clock-Hours Required, CIP: 52.1902)</i>			
Core (26 Credits/780 Clock-Hours)		Credits	Clock-Hours
FASH 1101	Introduction to Fashion	2	60
FASH 1105	Apparel Industry	3	90
FASH 1301	Strategies of Selling	2	60
FASH 1350	Social Media Marketing	1	30
FASH 1400	Textiles	2	60
FASH 1500	Fashion Styling	2	60
FASH 1512	Professional Development	2	60
FASH 1610	Promotional Event Planning	3	90
FASH 1700	Visual Merchandising	3	90
FASH 1721	Beginning Sewing	3	90
FASH 2300	Product Development	3	90
Elective (4 Credits/120 Clock-Hours Required)		Credits	Clock-Hours
ACCT 2110	Introduction to Entrepreneurship	2	60
FASH 1620	Digital Illustration	3	90
FASH 1640	Editorial Production and Design	1	30
FASH 1780	Advanced Sewing	3	90
FASH 2510	Historic Costume	2	60
FASH 2901	Special Applications FASH	4	120
FASH 2998	Fashion Merchandising Internship Ext	2	90
MDTC 1020	Graphic Design Applications I	3	90



Utah System of Higher Education

Fashion Merchandising and Development

FY2023 / 30 Credits (900 Clock-Hours)

PROGRAM DESCRIPTION

Fashion Merchandising and Development prepares students with the knowledge and skill-set necessary to be successful in the Fashion Industry in the following categories: retailing, promotion, visual merchandising, design, and entrepreneurship. Students will work with a teaching staff of industry professionals that emphasize hands-on instruction and provide competency-based training. From working on a full-scale fashion show production to creating window displays or constructing garments, students will work in a hands-on environment that allows them to explore their creativity while obtaining the skills necessary to enter the workforce in the fashion and associated industries. Upon completion of this competency-based certificate, past students have gained employment as a retail salesperson or manager, visual merchandiser, wardrobe stylist, costume technician or event coordinator to list a few.

Objectives:

- Graduates will demonstrate proficiency in marketing concepts, retail merchandising, selling techniques, styling methods, and visual presentation through hands-on assessments and creation of projects.
- Graduates will develop promotional and event production skills through planning, producing and promoting a full-scale fashion show production.
- Graduates will comprehend and illustrate effective use of the principles and elements of design by creating products, presentations, and displays through comprehensive assignments, projects, and tests.
- Graduates will show growth in professional development as it relates to communication skills, presentation methods, time management, and organization through instructor observations, evaluations, and an industry related internship.

COURSE DESCRIPTIONS

Introduction to Fashion

2 Credits/60 Clock-Hours

Students will dive into the diverse careers found in the fashion industry within the areas of design, business, inspiration and conception, and retail. Students will develop an economic outlook of the fashion industry and research current events and other news in the fashion industry. Students will identify similarities and differences between multiple careers while researching the job details and experience or education required to obtain a career in that field. Students will then search for a current job opportunity in the career of their choice that suits their interests and skills.

Objectives:

- Identify current trends and newsworthy events or developments in the fashion industry.
- Compare and contrast multiple careers to identify similarities and differences between them.
- Identify personal skills and strengths that are suited for a particular career and research a current job opportunity in that area.
- Outline the educational and professional experience required to obtain a career in the area of your choice.

Apparel Industry

3 Credits/90 Clock-Hours

Students will be introduced to the apparel industry through construction details, apparel terminology, designer research, and presentation techniques. From production to marketing. They will also learn how historical events from the 20th century influenced these areas to the present and how fashion history showcases itself in the apparel industry today. Students will also learn how fashion designers from different parts of the world impacted the industry. Students will have the opportunity to forecast a trend and design a corresponding 10-piece collection of apparel that will be marketed to a target audience.



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Objectives:

- Identify key apparel styles and construction details using correct terminology.
- Describe how important historical events and designers have influenced the apparel industry over time.
- Design an apparel collection based on research and trend forecasting for a specific target market.

Strategies of Selling

2 Credits/60 Clock-Hours

Students will be introduced to important areas of selling, including buying behaviors and motives, successful sales techniques, and preparation for sales presentations. Students will learn how to effectively approach and communicate with customers and clients to identify their needs, build trust, close sales, and develop a relationship to encourage their return. Students will also review the mathematics of selling and their applications in areas such as balancing cash drawers, making change, and calculating discounts and commission.

Objectives:

- Identify different types of customers and how to cater to their needs.
- Perform an effective sales presentation for a specific merchandise category.
- Calculate sales transactions, decimals, discounts, and other calculations based on selling scenarios provided.

Social Media Marketing

1 Credits/30 Clock-Hours

Students will be introduced to the core concepts of the influencer world and social media marketing. After learning the core concepts that lead to a successful social media marketing plan, students will develop a marketing plan for a new or existing business or brand. This process will include the following components: conducting a business/product needs analysis, developing a strategy, generating content, creating a posting calendar, and measuring the effectiveness of the strategy where possible.

Objectives:

- Conduct research to identify the needs of a new or existing business.
- Develop a social media marketing plan to satisfy business needs and goals.
- Design content for selected social media platforms through text, print, and visual mediums.
- Present marketing plan to your peers for feedback.
- Measure effectiveness of marketing strategy.

Textiles

2 Credits/60 Clock-Hours

Students will study fibers in order to understand the characteristics, properties, and care of major textiles. They will also identify appropriate types of fibers, fabrics, and construction methods for specific garments to achieve proper fit, quality, and style. Students will also research and develop ideas based on the latest advancements in the textile industry.

Objectives:

- Match physical fabrics to the appropriate name and identify the type of construction.
- Demonstrate the process of weaving, by creating paper versions of basic weaves.
- Identify appropriate fiber and fabric properties to apply in apparel design and selling interactions.
- Identify accurate care instructions and symbols for specific fabrics.
- Research and identify a new textile technology advancement in the industry.



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Fashion Styling

2 Credits/60 Clock-Hours

Students will learn how to take body measurements, calculate proportions, and assess figure types. Students will use shape relationships and elements of design to create the illusion of balanced figure types or portray a certain character, trend, or style. Students will put these methods to work by acting as a freelance stylist for a personal wardrobe consultation and a corporate client ad campaign. They will also learn and apply best practices for contract development as a freelance fashion stylist in mock scenarios.

Objectives:

- Perform a successful body measurement skills pass off.
- Identify figure types and body proportions using body measurements.
- Coordinate a wardrobe presentation for a mock client.
- Prepare a styling presentation for a mock corporate ad campaign.

Professional Development

2 Credits/60 Clock-Hours

Students will learn to create professional resumes, write cover letters, and complete job applications specific to their individual career focus. Students will also learn how to apply best practices of social media and technology to market their professional skills and experience in pursuit of a career. In addition, they will learn effective ways to communicate in management and leadership scenarios. Students will have the opportunity to develop effective interview techniques and follow-up procedures through a mock interview.

Objectives:

- Identify preferred career paths and create a social media presence for associated professional skills and experience.
- Create a professional resume and cover letter.
- Demonstrate effective interview techniques and apply appropriate follow-up procedures with potential employers.
- Showcase appropriate communication skills verbally and nonverbally through case scenarios.
- Identify appropriate levels of professional relationships between managers and co-workers.
- Demonstrate ability to conduct effective employee reviews with professionalism and sensitivity for areas of conflict.

Promotional Event Planning

3 Credits/90 Clock-Hours

Students will develop the necessary skills to plan, produce, and execute a promotional fashion show. They will demonstrate their skills and knowledge of promotion by working on the overall theme, advertising and marketing elements, choreography, merchandise and music selection, and merchandise preparation of the fashion show. Students will also develop project management skills by creating a team calendar to manage all important assignments and planning deadlines.

Objectives:

- Compile trend forecasting research for the current season.
- Develop a theme that could be implemented with a specified budget.
- Create social media posts and advertising elements for a BTECH fashion show.
- Plan and produce a promotional window display for a BTECH fashion show.
- Implement project management skills while working as a team on a BTECH fashion show.

Visual Merchandising

3 Credits/90 Clock-Hours

Students will focus on the development of creative concepts and visual presentation of merchandise and apparel. Students will learn the key principles and elements of design and discover how retailers use



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these principles and elements to present merchandise. Overall brand concepts, color psychology, fixtures, atmospherics, drafting, and display techniques will be covered. Students will receive hands-on experience in merchandise presentation and display.

Objectives:

- Identify the principles and elements of design in advertising and retail window displays.
- Differentiate between feature and capacity fixtures used in retail operations.
- Create an effective themed visual presentation of merchandise, accessories, and props for a display and planogram layout.
- Develop an overall retail store concept that includes merchandise categories, pricing, floor layout, fixtures, and atmospherics.

Beginning Sewing

3 Credits/90 Clock-Hours

Students will be introduced to basic sewing techniques, sewing equipment, and operations of a sewing machine and serger. They will learn how to apply body measurements, reading, pattern layout, and fabric selection to different garment types. Students will also create samples for a variety of sewing techniques and construct two simple garments using a commercial pattern.

Objectives:

- Identify the parts and correct operations of a basic sewing machine and serger.
- Evaluate the characteristics, performance, and care of specific textiles.
- Determine the most efficient layout for a commercial pattern.
- Demonstrate specific sewing techniques through two customized sewing practicums.
- Produce two quality garments using proper construction techniques and seam finishes for the fabric types.

Product Development

3 Credits/90 Clock-Hours

Students will learn the process of product development from research to production and distribution. They will learn the roles of the key positions within the apparel industry and the part they play to produce a product. Students will conduct market research and develop ideas for a line of goods to produce. Students will then learn the steps of production through material sourcing, manufacturer selection, sample creation, and distribution. Students will also learn best practices for contracts and negotiations in regards to product development.

Objectives:

- Identify the roles of the key positions in the apparel industry and steps necessary to produce a sample garment or other fashion-related item.
- Select appropriate companies/facilities to source raw goods and produce specific merchandise.
- Identify appropriate distribution policies and channels for a selected product.
- Outline the required steps to produce a product for the creation of a specific line of goods.

ELECTIVES (4 Credit hours/120 Clock-hours Required)

Introduction to Entrepreneurship

2 Credits/60 Clock-Hours

This course is designed to help you know what it takes to start a business, how to elaborate on your own business idea(s), and decide whether or not your business ideas have marketability. As you develop your ideas, you will learn how to brand a business and gain a basic understanding of what it takes to run a business before you start spending money. You will also have networking opportunities with local business owners and classmates along the way.



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Objectives:

- Complete a competitive analysis of local businesses.
- Create a business strategy.
- Project your business's expenses and income.
- Follow the brainstorming process of creating a business name and brand strategy.
- Determine the target market for your business.
- Create a sales strategy for your business.

Digital Illustration

3 Credits/90 Clock-Hours

Students will learn the basics of navigating and creating in CLO, a cutting-edge, 3D fashion design software. Using CLO, students will learn how to create and/or modify 2D pattern pieces, sew pattern pieces together, and simulate those garments in 3D. Students will have the opportunity to expand their design capabilities, produce faster and more accurate apparel renderings, and obtain skills that industry leaders are actively seeking.

Objectives:

- Demonstrate your ability to operate CLO design software.
- Modify and/or create functioning patterns and 3D apparel renderings in CLO.

Editorial Production and Design

1 Credits/30 Clock-Hours

Students will uncover the world of editorials during this course. They will have the opportunity to create a mock editorial for a high fashion magazine or website. Students will learn all the elements needed to create an effective editorial using appropriate copy, graphics, and layout standards. They will research a current trend in the fashion industry and develop a theme to use in their feature. Students will then learn the basic types of editorials and key design steps used to create aesthetically pleasing and effective content for an article/editorial feature in a magazine or website.

Objectives:

- Research trends and develop a theme for an editorial feature.
- Select a specific type of editorial and create an effective editorial feature for a high fashion magazine or website.
- Present a clear, informed story using professional and creative copy alongside strong visual imagery.

Advanced Sewing

3 Credits/90 Clock-Hours

This course will provide an extension of sewing skills gained in Beginning Sewing by focusing on clothing construction, fit, and design consideration at the advanced level. The focus will be aimed toward but not limited to outdoor gear style.

Objectives:

- Distinguish different types of fabric and fiber characteristics used in the sports and outdoor apparel industry.
- Demonstrate knowledge and ability to produce and improve pattern alterations for an accurate fit.
- Demonstrate correct sewing construction techniques at the intermediate level to complete three functional garments.

Historic Costume

2 Credits/60 Clock-Hours

This course covers the history of dress from the ancient world to the 19th century. The costume of each period is viewed within its historical, cultural, and economic context. Students will use their historical costume knowledge to design costumes for stage and film purposes.



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Objectives:

- Develop a basic vocabulary of the styles worn during each of the historical periods.
- Identify silhouettes, details, fibers, and material used for each period.
- Identify correct styles of clothing and accessories that were adopted by members of social groups that were socially appropriate for specific times and situations.
- Design costumes with proper historical design elements for a specific theater or film character.

Special Applications FASH

1-4 Credits/ 30 -120 Clock-Hours

This course provides students unique or advanced skill development identified as an immediate need in the current occupational industry. Specific course competencies will be documented and when possible, a descriptive title will be provided for the student transcript. Course length is not to exceed 180 hours.

Fashion Merchandising Internship Ext

2 Credits/90 Clock-Hours

Students will learn the practical application of classroom skills through real workplace situations. They will develop real-world work experience using decision-making, critical thinking, and problem-solving skills. Real client business projects will be assigned to the student by cooperative businesses and students will receive objective input on their performance. Customized student learning objectives will be developed addressing the individual needs of the organization and career interests of each student.

Objectives:

- Create personalized objectives (with on-site representative/supervisor) to be accomplished during the internship.
- Demonstrate competency in all skill areas being evaluated by on-site representative/supervisor.
- Maintain proper attendance and communication for the duration of the internship.
- Demonstrate ability to receive constructive criticism and improvement suggestions.
- Utilize soft and technical skills to successfully complete your objectives by the end of the internship.

Graphic Design Applications I

3 Credits/90 Clock-Hours

A course designed to teach fundamental techniques and principles for editing images. Creation of digital and photo images from scanning or video capture will also be covered.

Objectives:

- Use a computer system for editing digital images.
- Learn and operate current industry image editing software.
- Print digital images.
- Scan images.
- Use a digital camera.



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Interior Design
FY2023 / 39 Credits (1200 Clock-Hours)

Interior Design			
Institutions: Bridgerland			
<i>Certificate of Program Completion (Catalog Year: 2023, 39 Credits/1200 Clock-Hours Required, CIP: 5010408)</i>			
Core (39 Credits/1200 Clock-Hours)		Credits	Clock-Hours
IDES 1010	Design Theory	4	120
IDES 1025	Color Theory	1	30
IDES 1035	Rapid Sketching	2	60
IDES 1045	Materials & Sources	4	120
IDES 1050	Textiles & Pattern Development	1	30
IDES 1060	Building Codes	1	30
IDES 1070	Space Planning & AutoCAD	5	150
IDES 1080	SketchUp Pro	3	90
IDES 1090	REVIT Basics	4	120
IDES 1105	Architectural Detailing	5	150
IDES 1110	Senior Project	5	150
IDES 1120	Product Development & Portfolio	1	30
IDES 1130	Business Practices	1	30
IDES 2998	Interior Design Internship	2	90
Elective (0 Credits/0 Clock-Hours Required)		Credits	Clock-Hours
ACCT 2110	Introduction to Entrepreneurship	2	60
IDES 2999	Client Projects	2	90
IDES 1160	Field Trips	1	30



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Interior Design

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PROGRAM DESCRIPTION

Interior Design prepares students for a fast-paced, competitive industry that demands high professional standards. Students will be introduced to the latest and most relevant 3D software programs in the design industry such as: Photoshop, Illustrator, InDesign, AutoCAD, Revit, and SketchUp Pro. The learning environment is project-based, focusing on creative and technical skills while applying software programs. Coursework includes design theory, space planning, architectural detailing, building codes, and calculations. Students are mentored by industry professional instructors who provide one-on-one support.

Qualifying students will be provided with client projects, field trips, and possible internships at the Las Vegas World Market. Upon completion of this competency-based certificate, students are prepared to begin their career in the Interior Design industry.

Objectives:

- Graduates will demonstrate competency in creative and technical skills by taking a client's inspiration to a complete design concept.
- Graduates will prepare and present client projects demonstrating professionalism in verbal and visual communication and personal appearance.
- Graduates will utilize 3D consulting software for client presentations to introduce new product designs as well as construction designs.
- Graduates will demonstrate confidence in presenting design concepts to others for feedback and critique.
- Graduates will demonstrate the ability to read, understand, and develop effective construction documents.
- Graduates will develop professional business, leadership, and communication skills by planning, organizing, and participating with design teams for client projects.

COURSE DESCRIPTIONS

Design Theory

4 Credits/120 Clock-Hours

Students will learn the design process and elements of design theory to create original designs. Students will study current and relevant design styles, furniture styles, and roof shapes. They will also learn to use industry software such as Adobe Photoshop, Illustrator, InDesign, and Homestyler to apply design theory and technical software skills to 3D design renderings. Students will develop strong presentation skills by providing visual and verbal communication of their final design concepts while justifying their design decisions.

Objectives:

- Learn to correctly apply technical skills such as scale, proportion, light, shadows, and perspective realism in basic 3D perspective room renderings.
- Show proficiency in the basic principles of graphic design and branding.
- Demonstrate and further enhance creativity by completing the steps of the design process and applying techniques learned from the course.
- Learn to identify and apply key features of architecture, roof styles, and design styles through research and application of these features in individual designs.
- Demonstrate and further develop skills in professional communication by presenting final projects and justifying design decisions.

Color Theory

1 Credits/30 Clock-Hours

Students will explore the basics of color theory, beginning with the color wheel and the role of psychology in the human response to color. Students will also learn to identify tints, tones, and shades of colors



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through color selections and applications in designs. Students will assess design aesthetics and apply appropriate color harmonies and combinations to enhance or subdue a design.

Objectives:

- Identify tints, tones, and shades of color and their effects.
- Determine the role of various color combinations in enhancing and subduing designs.
- Create unique color harmonies and trend colors using color inspirations.
- Develop and apply color schemes to designs.
- Use color psychology to appropriately select and apply color to design projects.

Rapid Sketching

2 Credits/60 Clock-Hours

Students will learn to quickly sketch realistic one- and two-point perspectives in the correct scale to communicate design concepts to clients and team members. Students will practice quick, timed sketching and rapid rendering techniques using black sketching pens and markers. Students will learn to sketch architectural features applying the principles of line, texture, pattern, and shadow.

Objectives:

- Quickly sketch one- and two-point perspective drawings with architectural details, furniture, and accents.
- Use correct scale and proportion to sketched elements using a black pen and marker to show quick sketching techniques, such as shadows, depth, and texture.
- Complete timed rapid sketches in 15-minute and 3-minute practices.
- Apply appropriate design elements and principles in hand-rendered interior design sketches.

Materials & Sources

4 Credits/120 Clock-Hours

Students will research materials and products used for residential and commercial spaces. Students will learn each material's correct function and purpose by compiling industry standard specification sheets and researching requirements for installation and maintenance. Students will also learn how to source materials available for the residential and commercial markets and gain a greater understanding of labor costs and trending products. They will learn how to calculate product costs using specific formulas.

Objectives:

- Research and identify the best materials and sources for finish materials and products in residential and commercial interior/exterior projects.
- Identify new products, techniques, finishes, and innovations in the design market.
- Evaluate price and quality differences between interior and exterior finishes.
- Determine how fabrication, installation, and other specifications impact material selection.
- Apply correct measurement and calculation formulas to specific products for accurate quantities.

Textiles & Pattern Development

1 Credits/30 Clock-Hours

Students will learn the history of textiles and the influences cultures had on the construction and application of textiles in interior design. Students will also identify the role of fibers and weaves in fabric construction and the use of various types of fabrics and patterns best used. Students will apply product development to design a textile pattern, manufacture their own textile sample, and render their textile design in a way that best showcases their product line.

Objectives:

- Identify the correct construction and application of textiles used for residential and commercial designs.



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- Select different types of weaves and construction of fabrics to be used for the correct applications for furniture, window coverings, upholstery, accent pillows, and bedding.
- Create a textile pattern that can be developed into a product line and render the product into an interior design of choice.

Building Codes

1 Credits/30 Clock-Hours

Students will learn the process of finish material estimating and ordering procedures for installation. Students will become proficient in estimating and ordering finishes, including flooring, window and wall coverings, draperies, paint, and upholstery. They will also gain an understanding of building codes as they relate to finish materials and project installation. Students will demonstrate mastery of calculating estimates and identifying building code violations through mock-client scenarios.

Objectives:

- Calculate material estimates for a variety of finishes based on mock-client scenarios.
- Apply appropriate building codes while placing finish materials on floor plans.
- Analyze and effectively plan for finish materials within a client's budget.
- Identify areas of concern on floor plans and use building codes to correct building violations.

Space Planning & AutoCAD

5 Credits/150 Clock-Hours

Students will learn space planning rules to organize unique and creative spaces and design layouts of interior residential and commercial projects. Building codes, ADA accessibility requirements, environmental concerns, and occupancy standards will be used to organize residential and commercial interior spaces. Students will use problem-solving, sketching, and schematic design development to address the needs of clients to effectively organize and design new construction as well as to renovate projects.

Objectives:

- Use current building codes and ADA requirements to organize residential and commercial interior spaces based on the client specifications.
- Organize furniture plans that meet code requirements for clear, easy access and function.
- Apply problem-solving skills during the design phase for resolving problematic floor plans and/or existing spaces.
- Use AutoCAD to draft basic and advanced residential and commercial floor plans with project documents and schedules.

SketchUp Pro

3 Credits/90 Clock-Hours

Students will learn to use SketchUp Pro to import AutoCAD files and create 3D BIM (Building Information Modeling) models of existing floor plans, create new floor plans, and learn to use the software's main modeling features for custom architecture and furniture designs. Students will learn to navigate the SketchUp Pro warehouse for products and materials used to develop 3D renderings. They will learn how to use the 3D walk-through presentation features used for client meetings.

Objectives:

- Import design files from other software programs to be edited or added to using SketchUp Pro software.
- Apply knowledge of architecture and design elements to new build designs and create new floor plans.
- Create custom architecture and furniture using the SketchUp Pro BIM modeling software.
- Apply product materials to final renderings and navigate multiple presentation modes for client presentations.



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REVIT Basics

4 Credits/120 Clock-Hours

Students will learn how to use Autodesk 3D design software, Revit, to draft a large commercial office design. Basic Revit software will be instructed to apply advanced space planning concepts and commercial building codes. Students will learn how to apply Revit materials and create schedules for the project. Students will learn to render their projects in Revit for professional, visual presentations. The instruction in this course will prepare students for more advanced Revit training introduced in a later course.

Objectives:

- Use Revit 3D software to design and draft floor plans using current building codes.
- Apply materials and products effectively, create schedules, and design drawings for a set of professional construction documents.

Architectural Detailing

5 Credits/150 Clock-Hours

Students will use Revit to draft architectural detailed drawings and build MEP (HVAC, Electrical, and Plumbing) systems for commercial projects. They will draft working documents to include footings/foundations, sills, floors, walls, ceilings, windows, doors, roofs, electrical, plumbing, and climate control HVAC systems with their appropriate architectural symbols. Students will draft detailed drawings and elevations for architectural features such as stairs, fireplaces, and custom cabinets.

Objectives:

- Design and draft working construction documents based on industry standards using 3D Revit software, and current building codes.
- Label and specify all details and dimensions needed for furniture and other systems located in each space of a floor plan.
- Apply correct architectural symbols and dimensions to construction systems, detail drawings, interior and exterior elevation drawings, and working construction documents.
- Read, understand, and communicate the architectural details, systems, and codes on working drawings for residential designs.

Senior Project

5 Credits/150 Clock-Hours

In this course students will demonstrate mastery of all skills developed throughout the program. The senior project includes a large residential project using Revit. This final project must include the elements and principles of design, color theory, rapid sketching, materials and sources, textiles, building codes, space planning, architectural detailing, and product development. This final project will determine whether the student has learned the necessary skills required by industry leaders to be an interior designer.

Objectives:

- Provide research and inspiration for design, development, and refinement using the design process.
- Communicate the design process from rapid sketches and preliminary drawings to technical drawings and 3D renderings.
- Develop floor plans, elevations, construction plans, and final design renderings based on current code restrictions and applications.
- Manage budgets through calculations of square footages and material cost estimates.
- Source samples of products and provide construction and installation schedules and specifications.
- Apply appropriate building codes in detailed construction plans.
- Use Revit to create professional design plans and documents.



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- Create a professional presentation of the design process and final product for a class critique with project branding.
- Communicate the design concepts and elements of final design projects professionally, visually, and verbally.
- Provide sourced product and material samples for presentation value and physical communication of design elements.

Product Development & Portfolio

1 Credits/30 Clock-Hours

Students will use Adobe InDesign to compile their best product development designs and organize their approved portfolio assignments in a physical portfolio and on a web E-portfolio platform. Advanced graphic design skills will be used to design both the physical portfolio and E-portfolio. Students will use professional, personal branding, and marketing skills to promote both portfolios and to organize bodies of work. Professional resumes will be created to best represent the skill sets of each student. These will be promoted on social media platforms such as Indeed, LinkedIn, Instagram, and Facebook.

Objectives:

- Apply graphic design skills and training to market and promote product designs and design concepts.
- Develop professional portfolios and magazine spreads using Adobe InDesign.
- Build an easy-to-use, online web E-portfolio with an E-commerce option that can be added to and/or edited.
- Create a professional resume and promote it on social media platforms for future employment opportunities.

Business Practices

1 Credits/30 Clock-Hours

Students will be introduced to the business aspects of interior design. Students will learn how to apply professional best practices in social media management, interview and employment strategies, freelance work, collaboration with vendors, building and leading a design team, ethical business procedures, industry safety, client relationships, and personal branding. Students will have the opportunity to practice effective interviewing techniques in mock interviews as they job shadow a designer or specific business, create reports on vendors, and develop a business plan. Students will create professional business documents, such as a list of services, contracts, and invoices.

Objectives:

- Develop and practice proper interviewing techniques.
- Identify best practices in social media usage.
- Determine the different ways of building your own business or clientele.
- Identify key ethical and industry-standard business practices.
- Determine how to effectively brand yourself and/or your business.
- Create a vendor/trades list and project management schedules.

Interior Design Internship

2 Credits/90 Clock-Hours

Students will research potential internship opportunities based on their preference for employment and arrange a minimum of 90 hours to work as an intern. This hands-on training is an opportunity for students to secure a position or future employment at a workplace of their choice. The department head must approve all internships prior to students arranging the internship. Students will check in with an instructor each week of their internship to ensure that the objectives are being met and allow for any mentoring.

Objectives:

- Contact potential employers to promote themselves as future employees.



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- Provide professional portfolios and resumes for internships and job interviews.
- Demonstrate competency in all industry design software, attention to detail, problem-solving and time management.
- Apply design training, creative innovation, and technical design concepts to projects and/or assist on projects.
- Apply all required employment skills to each day of the internship.

NON-REQUIRED ELECTIVES (0 Credit hours/0 Clock-hours Required)

Introduction to Entrepreneurship

2 Credits/60 Clock-Hours

This course is designed to help you know what it takes to start a business, how to elaborate on your own business idea(s), and decide whether or not your business ideas have marketability. As you develop your ideas, you will learn how to brand a business and gain a basic understanding of what it takes to run a business before you start spending money. You will also have networking opportunities with local business owners and classmates along the way.

Objectives:

- Complete a competitive analysis of local businesses.
- Create a business strategy.
- Project your business's expenses and income.
- Follow the brainstorming process of creating a business name and brand strategy.
- Determine the target market for your business.
- Create a sales strategy for your business.

Client Projects

2 Credits/90 Clock-Hours

Students that have demonstrated sufficient competency may have the opportunity to work on client design projects. Students will apply all prior training and skills to develop the design concept, manage the design project, conduct client meetings, and presentations, source products, coordinate with vendors, collaborate with design team members, participate in follow-up meetings, and address all client concerns in a professional ethical manner.

Objectives:

- Demonstrate ability to take the lead on a design project.
- Identify challenges and solutions in scheduling, budgeting, and effectively managing time.
- Create design concepts and client presentations using industry-standard software.
- Demonstrate responsibility, professionalism, and respect while working with industry professionals.
- Organize and manage the project details, install, and/or stage a completed design project.
- Demonstrate customer service skills with follow-up meetings and daily and weekly correspondence.

Field Trips

1 Credits/30 Clock-Hours

Students who have a satisfactory progress ratio, positive attendance record, and have shown excellence in the quality of their work, can qualify to attend department organized field trips. Field trips include visiting national and local conferences and firms. Students will have the opportunity to connect with industry leaders and vendors. In preparation for making these connections, students will prepare a professional portfolio and resume to share with potential employers or internship providers.

Objectives:

- Apply real-life experience to their portfolios and resumes.



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- Make contacts and connections with industry leaders for potential future employment.
- Organize internship opportunities.
- Create vendor lists for trades accounts and designer discounts.



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Meat Services

FY2023 / 29 Credits (900 Clock-Hours)

Meat Services			
Institutions: Bridgerland			
<i>Certificate of Program Completion (Catalog Year: 2023, 29 Credits/900 Clock-Hours Required, CIP: 12.0506)</i>			
Core (27 Credits/840 Clock-Hours)		Credits	Clock-Hours
MEAT 1010	Introduction to Meat Services	2	60
MEAT 1020	Safety	3	90
MEAT 1030	Equipment	3	90
MEAT 1040	Beef Cutting I	4	120
MEAT 1050	Beef Cutting II	4	120
MEAT 1060	Pork & Lamb Cutting	5	150
MEAT 1070	Value Added Products	4	120
MEAT 2998	Packaging & Presentation	2	90
Elective (2 Credits/60 Clock-Hours Required)		Credits	Clock-Hours
ACCT 2110	Introduction to Entrepreneurship	2	60
MEAT 1300	Retail	2	60
MEAT 2999	Meat Services Internship	2	90



Utah System of Higher Education

Meat Services

FY2023 / 29 Credits (900 Clock-Hours)

PROGRAM DESCRIPTION

The Meat Services program at Bridgerland Technical College provides students the opportunity to obtain a certificate in the meat services industry. Highly skilled, industry-trained instructors guide students through hands-on and individualized instruction to meet the occupational goals of each student. Topics include knife care, meat inspection, sanitation, equipment, wholesale and retail operations, custom harvesting, custom cutting, pricing, cured/smoked meats, ground meats, beef, pork, and poultry. Students will also learn basic cooking skills needed to prepare and serve meat products. This program supports the Bridgerland Technical College mission to deliver competency-based, employer-guided career and hands-on technical education to the Bear River Region.

Objectives:

- Graduates will safely operate, clean, and maintain knives and meat processing equipment.
- Graduates will demonstrate an understanding of harvesting principles for beef, pork, and lamb.
- Graduates will safely demonstrate how to grade, breakdown, produce cuts (retail and custom), package, and sell beef products.
- Graduates will safely demonstrate how to grade, breakdown, produce cuts (retail and custom), package, and sell pork products.
- Graduates will safely demonstrate how to grade, breakdown, produce cuts (retail and custom), package, and sell lamb products.
- Graduates will safely demonstrate how to trim and package poultry products for retail sale.

COURSE DESCRIPTIONS

Introduction to Meat Services

2 Credits/60 Clock-Hours

The Introduction to Meat Services course provides career and program orientation for those pursuing a retail meat cutting career. Students will learn the basic sanitation principles required before they can work on the floor. They will be oriented to the floor, shop, kitchen, and other program workspaces. They will also learn about common retail and wholesale career paths for meat cutters.

Objectives:

- Demonstrate a professional level of hygiene.
- Demonstrate industry sanitation techniques.
- Identify potential career opportunities.

Safety

3 Credits/90 Clock-Hours

The Safety course introduces students to safety regulations for the meat industry for those pursuing a career in the meat industry. Students will learn basic workplace safety and meat industry safety and demonstrate knowledge of safety standards. Students will learn about state food and health safety requirements and will also successfully acquire a food handler's permit. They will also learn lifting, allergen, and hazard analysis critical control point (HACCP) safety. Students will learn and demonstrate basic knife care and safety.

Objectives:

- Students will care for and learn safe use of knives.
- Obtain a food handler's permit.
- Demonstrate safety procedures for handling and packaging meat.
- Demonstrate basic food and shop safety techniques.



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Equipment

3 Credits/90 Clock-Hours

The Equipment course provides students with an introduction to the different types of equipment used in the meat industry, how to safely use each of them, and how to care for them. Students will learn how to properly use and maintain equipment such as the grinder, tenderizer, and the smoker. They will also learn correct equipment assembly and disassembly.

Objectives:

- Identify uses of equipment commonly used by meat cutters.
- Safely use equipment to prepare various cuts of meat.
- Properly care for, clean, and store equipment.

Beef Cutting I

4 Credits/120 Clock-Hours

The Beef Cutting I course introduces students to the basic principles of beef cutting and provides basic skills necessary to work in the meat cutting industry. Students will gain realistic experiences working with beef in a laboratory setting, including beef harvesting and identification of various beef cuts. Students will participate in lab experiences while learning to break carcasses into wholesale parts. Students will learn about and demonstrate beef retail skills. They will also learn and demonstrate sanitation skills.

Objectives:

- Understand beef wholesale and custom meat cutting.
- Learn and understand the inspection process.
- Demonstrate the ability to correctly identify beef cuts.
- Demonstrate competencies preparing ground meats for retail.

Beef Cutting II

4 Credits/120 Clock-Hours

The Beef Cutting II course focuses on and reinforces improving students' basic skills and principles of beef cutting learned in the Beef Cutting I course. Students will gain realistic experiences in a laboratory setting working with beef. Students will learn the process of custom cutting as detailed by the clients served. They will also learn the best practices of cooking each type of beef cut and will demonstrate competency preparing them to assist customers in a shop.

Objectives:

- Demonstrate competencies in following custom instructions.
- Opportunity to pass off and demonstrate proficiency in harvesting skills.
- Demonstrate competency in preparing retail, wholesale, and custom beef cuts.
- Demonstrate competencies required for inspection, sanitation, grading, and yielding.

Pork & Lamb Cutting

5 Credits/150 Clock-Hours

The Pork & Lamb cutting course introduces students to the basic principles of pork and lamb cutting and provides basic skills necessary to work in retail meat cutting. Students will gain realistic experiences working with pork and lamb in a laboratory setting. Students will participate in lab experiences while learning to break carcasses into wholesale parts, including primal, sub-primal. They will also learn the best practices of cooking pork and lamb and demonstrate competency in this while preparing to assist customers in a shop.

Objectives:

- Opportunity to pass off and demonstrate proficiency in harvesting skills.
- Understand pork wholesale and custom meat cutting.
- Demonstrate competency in preparing retail, wholesale, and custom pork and lamb cuts.
- Understand lamb wholesale and custom meat cutting.



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- Demonstrate the ability to correctly identify pork and lamb cuts.

Value Added Products

4 Credits/120 Clock-Hours

The Value Added Products course focuses on and reinforces improving students' basic skills and principles of meat cutting and allows students to work with meat and cuts that were not covered in other courses. With such a wide variety of meats available, this course teaches students how to apply what they have learned in the other courses and allows them to practice those skills with regards to miscellaneous cuts. Students will gain experience working with seasonal and custom cuts.

Objectives:

- Demonstrate competency in utilizing offal, and producing/preparing marinated products, jerky, various sausages, and smoked products.
- Demonstrate competency in evaluating yield and calculating prices of value added products.
- Demonstrate the ability to correctly identify cuts.

Packaging & Presentation

2 Credits/90 Clock-Hours

The Packaging & Presentation course introduces students to the basic principles of meat packaging and presentation. Students will practice and demonstrate the ability to independently prepare retail cuts of meat from carcass animals or boxed products, and properly label and price the products. Students will develop essential knowledge of retail procedures including packaging, pricing, and displaying products in a retail environment. Students will also gain basic experience working in a retail setting with customers.

Objectives:

- Demonstrate skills in packaging and displaying beef, pork, lamb, and poultry.
- Understand concepts in meat pricing.
- Fulfill orders and complete custom cut requests.

ELECTIVES (2 Credit hours/60 Clock-hours Required)

Introduction to Entrepreneurship

2 Credits/60 Clock-Hours

This course is designed to help you know what it takes to start a business, how to elaborate on your own business idea(s), and decide whether or not your business ideas have marketability. As you develop your ideas, you will learn how to brand a business and gain a basic understanding of what it takes to run a business before you start spending money. You will also have networking opportunities with local business owners and classmates along the way.

Objectives:

- Complete a competitive analysis of local businesses.
- Create a business strategy.
- Project your business's expenses and income.
- Follow the brainstorming process of creating a business name and brand strategy.
- Determine the target market for your business.
- Create a sales strategy for your business.

Retail

2 Credits/60 Clock-Hours

The Retail course introduces students to the basic principles of meat retail. Students will work to develop essential knowledge of retail procedures including packaging, pricing, displaying products, and customer service in a retail environment. Students will improve on and strengthen skills acquired in the Packaging & Presentation course. Students will also prepare to work with customers in a shop, learning proper



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FY2023 / 29 Credits (900 Clock-Hours)

customer service skills, such as greeting customers, answering customer questions, and ringing up the customers' orders on the cash register.

Objectives:

- Demonstrate proper meat packaging and display techniques.
- Students will learn how to properly rotate stock to ensure fresh product.
- Students will learn about pull dates and how to handle the product after it's been pulled.
- Students will demonstrate proper customer service skills.
- Students will learn and demonstrate proper sanitation of display cases.

Meat Services Internship

2 Credits/90 Clock-Hours

Students will learn the practical application of classroom skills through real workplace situations. They will develop real-world work experience using decision-making, critical thinking, and problem-solving skills. Real client business projects will be assigned to the student by cooperative businesses and students will receive objective input on their performance. Customized student learning objectives will be developed addressing the individual needs of the organization and career interests of each student.

Objectives:

- Create personalized objectives (with supervisor) to be accomplished during the internship.
- Demonstrate competency in all skill areas being evaluated by supervisor.
- Maintain proper attendance and communication for the duration of the internship.
- Demonstrate ability to receive constructive criticism and improvement suggestions.
- Utilize soft and technical skills to successfully complete your objectives by the end of the internship.



Utah System of Higher Education

Esthetician

FY2023 / 16 Credits (600 Clock-Hours)

Esthetician			
Institutions: Davis			
<i>Certificate of Program Completion (Catalog Year: 2023, 16 Credits/600 Clock-Hours Required, CIP: 12.0409)</i>			
Core (16 Credits/600 Clock-Hours)		Credits	Clock-Hours
PREF XXXX	Foundations	1	30
PREF XXXX	Basic Theory I	4	120
PREF XXXX	Basic Theory II	4	120
PREF XXXX	Basic Clinical I	3	135
PREF XXXX	Basic Clinical II	3	135
PREF XXXX	Basic Clinical III	1	60
Non-Required Electives (0 Credits/0 Clock-Hours Required)			
<i>Davis Technical College</i>			
PREF XXXX	Esthetics Clinical Practice I	0	9
PREF XXXX	Esthetics Clinical Practice II	0	27
PREF XXXX	Esthetics Clinical Practice III	1	60
PREF XXXX	Lash Extension Course	0	15
PREF XXXX	Advanced Waxing	0	15



Utah System of Higher Education

Esthetician

FY2023 / 16 Credits (600 Clock-Hours)

PROGRAM DESCRIPTION

The Esthetician program prepares students to enter the world of skin care, and natural nail care by teaching the required skills for success in a competitive industry. Students will develop communication skills, professional behavior, and the core skills of working in or building a spa business. Students will work with spa guests in a modern, well-equipped spa and will perform these skills with the newest techniques, products, and equipment in the industry. At the end of the program, students will be qualified to take the Basic Utah State Esthetician Licensing Exams.

Objectives:

- Demonstrate esthetic skills such as: communication skills, professional behavior, facials, manicures, and pedicures, skin care massage, chemical peels, microcurrent facials, hair removal, makeup, body treatments
- Explain general sciences related to Esthetics such as: anatomy, infection control, skin structure, skin diseases and disorders, chemistry, and electricity
- Demonstrate spa processes and etiquette with proper sanitation procedures necessary for the health and safety of spa guests and self
- Perform esthetic services on manikins and spa guests
- Communicate effectively with spa guests and colleagues
- Demonstrate communication skills through electronic, verbal, and written formats
- Prepare for the state board licensure exam

COURSE DESCRIPTIONS

Foundations

1 Credit/30 Clock-Hours

This course prepares students to enter the world of skin care, and natural nail care, by teaching the required skills for success in a competitive industry.

Objectives:

- Demonstrate communication skills and professional behavior
- Develop the core skills of working in or building a spa business

Basic Theory I

4 Credits/120 Clock-Hours

This course introduces the basic procedures of skin care. This includes an understanding of the basic structure, composition of the skin, and maintenance of healthy skin. Students will demonstrate and explain theory and practical application procedures associated with the basic needs of the skin.

Objectives:

- Identify the factors that influence aging of the skin
- Recognize which skin disorders can be treated in the spa and which should be referred to a physician
- Demonstrate proper set-up, cleaning, and disinfection during treatments
- Perform various types of basic esthetic services
- Demonstrate and explain basic theory, practical application, and procedures associated with basic skin care
- Demonstrate and learn practical applications while working on course related content
- Students will demonstrate competency through assignments, testing, and practical application

Basic Theory II**4 Credits/120 Clock-Hours**

This course introduces advanced topics, treatments, and nutritional effects of the skin. This includes basic hands-on techniques. Students will demonstrate and explain theory and practical application procedures associated with the basic needs of the skin.

Objectives:

- Demonstrate essential business skills
- Communicate effectively with spa guests
- Comprehend the importance of meeting industry standards of quality, professionalism, efficiency, sanitation, and safety in preparation for entering the esthetician industry
- Demonstrate and explain basic theory, practical application, and procedures associated with basic skin care
- Demonstrate and learn practical applications while working on course related content
- Students will demonstrate competency through assignments, testing, and practical application

Basic Clinical I**3 Credits/135 Clock-Hours**

This course applies the principles and practices learned in the Basic Theory I and II. Students will begin to provide spa services in a clinical setting. Students will provide a variety of services on spa guests and models.

Objectives:

- Demonstrate spa processes and etiquette
- Communicate effectively with spa guests and colleagues
- Demonstrate sanitation procedures
- Safety and preparation for entering the esthetic industry

Basic Clinical II**3 Credits/135 Clock-Hours**

This course applies the principles and practices learned in the Basic Theory I and II. Students will perform a variety of services on spa guests. This course will help prepare students for client work and building a clientele.

Objectives:

- Demonstrate spa processes and etiquette
- Communicate effectively with spa guests and colleagues
- Demonstrate sanitation procedures
- Safety and preparation for entering the Esthetic industry
- Continue practical application and procedures on spa guests

Basic Clinical III**1 Credits/60 Clock-Hours**

This course applies the principles and practices learned in the Basic Theory I and II. Students will perform a variety of services on guests in a spa-like setting.

Objectives:

- Demonstrate spa processes and etiquette
- Communicate effectively with spa guests and colleagues
- Demonstrate sanitation procedures
- Safety and preparation for entering the Esthetic industry
- Continue practical application and procedures on spa guests

NON-REQUIRED ELECTIVE COURSE DESCRIPTIONS

Davis Technical College

Esthetics Clinical Practice I

0 Credits/9 Clock-Hours

In the esthetician clinicals, you will apply the principles and practices learned in the Esthetician I and II courses as you perform a variety of services on clients in the cosmetology salon. The clinical will help prepare you to pass the State of Utah licensure exams.

Objectives:

- Demonstrate practical interviewing, retailing, and marketing skills
- Demonstrate spa processes and etiquette
- Communicate effectively with spa guests and colleagues
- Demonstrate proper sanitation procedures
- Demonstrate safety and prepare to enter the Esthetic industry
- Continue practical application and procedures on spa guests

Esthetics Clinical Practice II

0 Credits/27 Clock-Hours

In the esthetician clinicals, you will apply the principles and practices learned in the Esthetician I and II courses as you perform a variety of services on clients in the cosmetology salon. The clinical will help prepare you to pass the State of Utah licensure exams.

Objectives:

- Demonstrate practical interviewing, retailing, and marketing skills
- Demonstrate spa processes and etiquette
- Communicate effectively with spa guests and colleagues
- Demonstrate proper sanitation procedures
- Demonstrate safety and prepare to enter the Esthetic industry
- Continue practical application and procedures on spa guests

Esthetics Clinical Practice III

1 Credits/60 Clock-Hours

In the esthetician clinicals, you will apply the principles and practices learned in the Esthetician I and II courses as you perform a variety of services on clients in the cosmetology salon. The clinical will help prepare you to pass the State of Utah licensure exams.

Objectives:

- Demonstrate practical interviewing, retailing, and marketing skills
- Demonstrate spa processes and etiquette
- Communicate effectively with spa guests and colleagues
- Demonstrate proper sanitation procedures
- Demonstrate safety and prepare to enter the Esthetic industry
- Continue practical application and procedures on spa guests

Lash Extension Course

0 Credits/15 Clock-Hours

This course prepares students to apply semi-permanent lashes.

Objectives:

- Demonstrate proper sanitation for lash extension application
- Demonstrate proper lash extension application
- Demonstrate proper removal of lash extensions
- Demonstrate proper fill of lash extension application

Advanced Waxing**0 Credits/15 Clock-Hours**

In this course, you will learn to apply principles and practices learned in Basic Esthetics I, II, & III and Master Esthetics I, II, & III.

Objectives:

- Continue to build on basic waxing techniques
- Demonstrate proper sanitation for hair removal
- Demonstrate proper application of waxing techniques
- Demonstrate proper removal of waxing techniques



Utah System of Higher Education

Home Health Aide

FY2023 / 10 Credits (300 Clock-Hours)

Home Health Aide			
Institutions: Davis			
<i>Certificate of Program Completion (Catalog Year: 2023, 10 Credits/300 Clock-Hours Required, CIP: 51.2602)</i>			
Core (10 Credits/300 Clock-Hours)		Credits	Clock-Hours
HOHA 1110	Nurse Assistant & Home Health Aide	5	150
HOHA 1510	Nurse Assistant & Home Health Aide Skill Lab	4	120
HOHA 1900	Nurse Assistant Certification Evaluation	1	30



Utah System of Higher Education

Home Health Aide

FY2023 / 10 Credits (300 Clock-Hours)

PROGRAM DESCRIPTION

The home health aide is an important member of the health care team directly involved with patient care of physically or mentally challenged individuals who need help with personal care, activities of daily living, and simple household chores. The Home Health Aide program prepares students to seek employment in residential care facilities, hospice settings, and clients' homes. During the program, students will develop strong communication techniques and learn the basic nursing skills necessary to become certified as a nurse assistant in the State of Utah. Students will demonstrate proficiency in providing basic personal cares including bathing, showering, grooming, and other personal hygiene tasks, as well as develop skills for basic household tasks such as cooking and meal preparation, light cleaning, and doing laundry. Students will develop an understanding of basic household safety and complete a ServSafe course on food safety. Upon successful completion of the program, students will be recommended to take the UNAR State Certification exam to become a certified nurse assistant in the State of Utah and will receive a food handlers' permit from the Utah Department of Health.

Objectives:

The mission of this program is to enable the home health aide to demonstrate the knowledge, skills and professionalism required by employers and residents, protect certified nurse assistants' rights to practice, and promote effective, efficient healthcare delivery in a variety of healthcare settings. In this course you will participate in hands-on skills practice, take written assessments, and review textbook and vocabulary assignments. Upon completion of this program, students will have received specialized training to be a home health aide. In the Home Health Aide program, students will be enrolled in 300 hours of training, 115 of which is course-specific certified nurse assistant training (90 in classroom instruction and 25 in clinical practice). Throughout this training, students will have the opportunity to:

- Apply basic nursing skills necessary to gain employment in long-term care facilities, home health, hospice, and acute care settings
- Develop and enhance communication and interpersonal skills necessary to function as a caregiver and member of an interdisciplinary healthcare team
- Perform tasks that meet the psychological, social, physical, and spiritual needs of those they are caring for
- Demonstrate competency in basic nursing skills in preparation for completion of UNAR state certification testing

COURSE DESCRIPTIONS

Nurse Assistant & Home Health Aide

5 Credits/150 Clock-Hours

Nurse Assistant examines the holistic approach to safely caring for patients in a variety of settings. While in this course, you will analyze how healthcare systems operate and how to function efficiently within a facility. You will also practice how to work on a healthcare team to meet the patient needs. After completing this course and passing a state certification examination, you will play an essential role on a healthcare team by observing, reporting, and performing skills studied within this course.

Objectives:

- Explore how to safely care for patients and residents in a variety of healthcare settings
- Recognize the skills needed to pass the State of Utah Certified Nurse Assistant (C.N.A.) examination administered by UNAR
- Identify the skills and knowledge necessary to be an essential part of the healthcare team and meet the needs of patients and residents



Utah System of Higher Education

Home Health Aide

FY2023 / 10 Credits (300 Clock-Hours)

Nurse Assistant and Home Health Skill Lab

4 Credits/120 Clock-Hours

Nurse Assistant and Home Health Aide Skill Lab examines the holistic approach to safely caring for patients in a variety of settings. While in this course, you will demonstrate and practice the skills necessary to provide patient care in a variety of healthcare settings including long-term care, home care, and hospice. You will also practice how to work on a healthcare team to meet the patient needs. After completing this course and passing a state certification examination, you will play an essential role on a healthcare team by observing, reporting, and performing skills studied within this course.

Objectives:

- Demonstrate how to safely care for patients and residents in a variety of healthcare settings
- Perform the skills needed to pass the State of Utah Certified Nurse Assistant (C.N.A.) examination administered by UNAR
- Apply the skills and knowledge necessary to be an essential part of the healthcare team and meet the needs of patients and residents

Nurse Assistant Certification Evaluation

1 Credit/30 Clock-Hours

The Nurse Assistant Certification Evaluation requires students to develop their hands-on skills before moving forward to the Utah Nurse Assisting Registry (UNAR) certification. This final evaluation will help prepare students for the skills that may be evaluated under UNAR guidelines. This preparation will include evaluation on hands-on skills associated with vital signs, beginning and ending procedures, communication, hand-washing, basic safety, moving and positioning, restorative care, hygiene and grooming, nutrition, elimination, infection prevention, and end of life care.

Objectives:

- Categorize the structure of the healthcare system and the nursing assistant's role in the healthcare team.
- Develop an understanding of rehabilitation and restorative care and demonstrate competency with common assistive devices and equipment.
- Demonstrate professionalism, including an understanding of HIPAA and the nursing assistant's role in protecting privacy and confidential information.
- Employ communication skills necessary to function as a caregiver that are culturally sensitive.
- Identify personal and environmental infection control measures and minimize potential hazards that may occur in any care settings.
- Demonstrate how a Certified Nursing Assistant can make a patient/resident's environment comfortable, safe, and clean.
- Describe basic nutrition, intake and output, and diet necessities or food preferences.
- Explain the significance of OSHA, the Omnibus Budget Reconciliation Act (OBRA), and the role of the Utah Nursing Assistant Registry (UNAR).
- Demonstrate the skills needed to pass the State of Utah Certified Nurse Assistant (C.N.A.) examination administered by UNAR



Utah System of Higher Education

Injection Molding

FY2023 / 20 Credits (600 Clock-Hours)

Injection Molding			
Institutions: Davis			
<i>Certificate of Program Completion (Catalog Year: 2023, 20 Credits/600 Clock-Hours Required, CIP: 15.0607)</i>			
Core (17 Credits/510 Clock-Hours)		Credits	Clock-Hours
INJM 1000	Basic Injection Molding Machine Operations	2	60
MATH 0900	Computational Math	1	30
INJM 1011	Practical Injection Molding	2	60
INJM 1022	Injection Molding Changeovers	2	60
INJM 1103	Standardized Process Tests	2	60
INJM 1111	Process Development and Decoupled Molding	2	60
INJM 1130	Basic Automation for Injection Molding	1	30
INJM 1040	Injection Molding Auxiliary Equipment	1	30
INJM 1123	Injected Molded Part Problems and Solutions	1	30
WKSK 1400	Workplace Success	2	60
WKSK 1500	Job Seeking Skills	1	30
Electives (3 Credits/90 Clock-Hours)			
INJM 1030	Economics of Injection Molding Operations	1	30
INJM 1050	Hot Runner Molding Solutions	1	30
INJM 2910	Injection Molding Externship	2	90
INJM 1135	Introduction to 3D Printing	2	60
INJM 1151	Injection Molding Student Project	1	30
INJM 1250	Fluid Power Hydraulics	2	60
INJM 2000	Advanced Process Development	2	60
IAMT 2025	Industrial Robotics	3	90



Utah System of Higher Education

Injection Molding

FY2023 / 20 Credits (600 Clock-Hours)

PROGRAM DESCRIPTION

The Injection Molding program prepares students for a fun, rewarding, and high-paying career as an injection molding process technician in a growing industry. Currently there are dozens of Utah companies that employ technicians to mold parts used in products ranging from lifesaving medical devices to cars and electronics.

Students will work hands-on with highly trained and skilled instructors on state-of the-art equipment. As part of that training, students will safely setup, operate, and maintain injection molding machines and auxiliary equipment; perform injection molding changeovers; and collaborate with the product development team to improve processes. Students will receive training in operating and programming robotics. During the program, students will prepare capital equipment justifications, to support profitable purchases, and calculate cost estimate used to secure future business. After completing the program, students will work with one of our placement specialists to find employment that utilizes these newly gained skills.

Objectives:

- Practice safety skills in injection molding.
- Start-up, operate, and maintain injection molding machines and auxiliary equipment.
- Perform injection molding changeovers using current written methods, and analyze those methods using Single Minute Exchange of Dies (SMED) to improve changeover processes and documentation
- Prepare capital equipment justifications and cost estimate bids.
- Setup and operate injection molding automation--including servo robots and sprue pickers
- Create robot programs for new operations
- Employ scientific molding principals to develop and improve low variation molding processes
- Demonstrate part defect troubleshooting
- Practice preventative maintenance for injection molding

COURSE DESCRIPTIONS

Basic Injection Molding Machine Operations

2 Credit/60 Clock-Hours

Basic Injection Molding Machine Operations explores how to operate an injection molding machine in a production environment including defect identification, and concepts of quality manufacturing. During this course, you will examine general safety, as well as safety that is specific in an injection molding environment. You will also de-gate and count parts, as well as document running conditions and production numbers while operating a molding cell.

Objectives:

- Identify and properly utilize Personal Protective Equipment (PPE)
- Explain and demonstrated Lock-Out, Tag-Out procedures
- Identify the major components of and injection molding machine
- Describe the function of the major components of an injection molding machine
- Explain and demonstrate the basic injection molding cycle
- Use molding machine controls to operate a molding machine
- Identify basic part defects and list reasons why defects are a problem for molders and customers
- Perform basic part measurement using calipers and a scale
- Explain and perform visual inspection of injection molded parts
- Use quality documents to record critical quality metrics

- Describe mold changing steps and create basic tool change instructions
- Discuss the importance of process setup sheets and production documentation
- Use a process setup sheet to verify the settings of a molding machine and auxiliaries
- Record key data during machine operation on production documents

Computational Math

1 Credit/30 Clock-Hours

Computational Math examines the application of the correct mathematical operation to solve practical problems. During your time in this course, you will use whole numbers, fractions, decimals, and percentages to solve practical problems. You are also introduced to the basics of measurement, geometry, averages, probability, patterns and simple equations.

Objectives:

- Recognize number sense, including rounding and comparing numbers
- Add, subtract, multiply and divide whole numbers and decimals
- Calculate percentages
- Use formulas to find perimeter and area
- Convert measurements

Practical Injection Molding

2 Credits/60 Clock-Hours

Practical Injection Molding explores basic principles of hydraulics and electro-mechanical actuators on molding machine clamp and injection units. Throughout this course, you will study the structure of a mold, including two plate, three plate, and hot runner molds. You will also identify mold parts by disassembling and reassembling a mold. You will examine polymer types and material properties. In addition, you will compare and contrast the differences in amorphous and crystalline materials. You will also verify and change common machine control settings on a molding machine.

Objectives:

- Describe basic principles of hydraulics and electro-mechanical actuators on molding machine clamp and injection units
- Explain how an injection molding machine control is used to control velocities, pressures, and positions
- Describe the function of the plasticizing screw and identify its different sections
- Recognize the structure of a mold, including two plate, three plate, and hot runner molds.
- Identify parts of a mold through disassembly and reassembly of a mold
- Discuss polymer types and material properties, including the difference in amorphous and crystalline materials
- Identify, verify, and change common machine control settings on a molding machine
- Identify the transfer position in a process and explain why it is important

Injection Molding Changeovers

2 Credits/60 Clock-Hours

Students in this course will learn basic procedures to safely and quickly change over a molding cell from one product to another. Students will learn to document the changeover process and improve the speed and accuracy of an injection molding changeover using the SMED improvement process (Single Minute Exchange of Dies). Students will also learn to apply these principles in current and future workplaces.

Objectives:

- List key safety personal protection equipment (PPE) when performing a tool change
- Use Microsoft Office to create professional tool change instruction and setup sheets

- Describe how to safely and effectively change resin in a molding machine from one material to another
- Describe lot traceability for injection molding materials
- List common materials that will cause safety issues if a bridge material is not used
- Explain why a purging compound can reduce overall costs
- Explain how to estimate the weight of a tool and how to select correct clamps and screws for a mold
- Explain why a torque wrench should be used to tighten mold clamp bolts
- Show how to connect the machine ejector plate to the tool ejector plate
- Show how to load mold settings on the molding machine controller for a tool change.
- List the steps in the SMED changeover reduction process
- Demonstrate how to use SMED principals to improve tool changes

Standardized Process Tests

2 Credits/60 Clock-Hours

Students in this course will learn about helpful machine processing tests that facilitate scientific molding in order to pick repeatable injection times. Students will learn how to perform these tests on several machines with several different molds and will also learn how to apply the results of the tests to pick optimal fill time ranges. The process tests include static and dynamic check rings tests, load sensitivity, effective viscosity study, pressure loss study, fill time study, part weight study, screw and barrel study, and melt temperature study.

Objectives:

- Explain the standardized process tests that can be used to select optimal ranges for fill time settings
- Describe conditions required to create a “fill only” process
- Describe effects of changing the transfer position
- Demonstrate:
 - Establishing a “fill only” process
 - Estimation of clamp force requirements
 - Gate seal study
 - Check ring studies
 - Load sensitivity study
 - In-mold rheology study
 - Fill pressure study
 - Pressure loss study
 - Fill time study
 - Cavity imbalance study
 - Injection speed linearity study
- Identify fill times that will result in poor injection repeatability.

Process Development and Decoupled Molding

2 Credits/60 Clock-Hours

Students in this course will learn what scientific molding, or Decoupled Molding (SM), is and how to use the principles to create robust injection molding processes. Students will learn to master skills in processing tools including setting all required molding machine and auxiliary equipment settings. Students will learn to optimize the processes to minimize cycle time and maximum product quality. Students will also learn transfer tools between different injection molding machines and become familiar with the FMEA (Failure Mode and Effects Analysis) and its application in developing robust molding processes.

Objectives:

- Describe:
 - Plastic temperature, flow rate, pressure gradient, and cooling rate
 - Applications that benefit from parallel motion
- Explain the following:
 - Use of FMEA (Failure Modes and Effect Analysis) analysis to create key process controls
 - Use of designed experiments to refine molding processes
 - Setting parameters on different machines to create identical plastic processing conditions
- Identify key parameters where process alarms are useful
- Identify key process conditions that must be documented
- Demonstrate the following:
 - Process development using the systematic approach
 - Scientific molding processes
 - Process refinement
 - Documentation of processes
 - Creation of machine independent, universal setup sheets
 - Saving and backup of machine settings files
 - Transferring a process and mold to another molding machine
 - Reduction in setup time

Basic Automation for Injection Molding

1 Credit/30 Clock-Hours

Students in this course will learn to perform basic setup and operation of sprue pickers and injection molding takeout robots. Students will learn the basics of the robot interface plug, dummy plugs, and how to work safely around robots. Students will learn how to setup a sprue picker for operation with a two-plate mold and a three-plate mold. Students will participate in activities that will help them understand how a robot or sprue picker can save money and improve quality. Students will learn how to use a reject chute or reversing conveyor.

Objectives:

- Describe:
 - Differences between a sprue pickers and a three axis takeout robots
 - Importance of safety guarding
- Identify:
 - Reduction or increase of cycle time with the use of a takeout robot
- Demonstrate:
 - Verification of robot safety interlocks
 - Manual and automatic robot operation
 - Robot teaching
 - Sprue picker setup
 - End of arm tooling changeover
 - Setup of vacuum gripper settings
 - Setup of mechanical gripper position verification
- Explain:
 - Operation of the robot-IMM electrical interface plug
 - How a robot can be used to prevent loss of part orientation
 - Differences between teaching data and robot programs

Injection Molding Auxiliary Equipment

1 Credit/30 Clock-Hours

Students in this course will learn about common auxiliary equipment found in molding cells including granulators, dryers, mold temperature controllers, sprue pickers, chillers, cooling towers, hot runner controls, hopper loaders and hydraulic core units. Students will learn the main functions of each of these machines and how they add value to the molding process. Students will also learn to operate the auxiliary equipment in the molding lab by performing changeovers and learning to set parameters on the equipment.

Objectives:

- Explain:
 - Dryer moisture removal method
 - Mold temperature controller methods of heating and cooling process water
 - Process cooling using chillers and cooling towers
 - Volumetric feeder operation
 - Gravimetric blender operation
 - Auxiliary hydraulic core unit function
- Demonstrate:
 - Prepare, use, and changeover a resin dryer
 - Correct use of a moisture analyzer
 - Cleaning, setup and maintenance of hopper loaders and vacuum resin conveying systems
 - Process Cooling and Heating
 - Proper use of hot runner controllers.
 - Safe operation of a granulator.
 - Cleaning and changeover of a granulator.
 - Measurement and hand blending of virgin resin and colorants.
 - Connection, setup, start and stop of mold temperature controllers.
 - The function of color meters, gloss meters, and tensile testing equipment.
 - Safe removal of stuck sprues using sprue pulling pliers.
 - Starting and stopping of a sprue picker.
- Describe the difference between an open and closed fluid process.
- Identify applications to volumetric and gravimetric blenders.
- Identify sprue pickers, takeout robots, conveyors, and tote indexing equipment.

Injected Molded Part Problems and Solutions

1 Credits/30 Clock-Hours

Injected Molded Part Problems and Solutions examines the common defects found in injection molded parts. During this course, you will explore the causes of common defects like, burn marks, cracking, flash, jetting, short shots, sink marks, splay, dimensions issues, voids, warp and weld lines. At the end of this course, you will propose, test, and implement process and tooling solutions to eliminate defects when faced with different defects in an existing process.

Objectives:

- Describe and identify common injection molding defects
- Identify the key molding parameters that cause specific molding defects
- Demonstrate methods used to solve the following defects:
 - Flash
 - Short Shots
 - Sinks
 - Dimensional Problems

- Warping
- Demonstrate the use of cause-and-effect diagrams and analysis to identify the cause of common molding defects
- Explain how to eliminate defects and prevent reoccurrence

Workplace Success

2 Credits/60 Clock-Hours

Workplace Success is designed to help students develop essential work habits and attitudes as well as human-relation skills needed to maintain gainful and satisfying employment. Topics include common challenges faced in the workplace, such as presenting yourself professionally, developing a professional work ethic, developing interpersonal skills, navigating office politics successfully, and planning and managing your career.

Objectives:

- Demonstrate a positive attitude and set and accomplish personal and career goals
- Manage time, stress, organization, and finances
- Explain conflict resolution, negotiation, and communication in the workplace
- Display a strong work ethic and illustrate accountability
- Perform work within a group effectively and discuss the value of negotiation and compromise
- Describe the basics of public speaking and presenting a professional demeanor
- Implement career goals and take active control of professional life

Job Seeking Skills

1 Credit/30 Clock-Hours

Job Seeking Skills explores how to prepare and successfully apply to potential career opportunities. During this course, you will be presented with essential job-seeking skills needed to find gainful employment.

Objectives:

- Create a professional resume, cover letter and reference sheet
- Utilize online tools successfully to create an e-portfolio
- Expand and develop networking skills
- Utilize online resources effectively to find job openings
- Demonstrate the ability to fill out job applications in a professional manner
- Perform successfully in a job interview
- Demonstrate appropriate follow-up procedures

ELECTIVES (11 Credits/330 Clock-Hours Required)

Economics of Injection Molding Operations

1 Credit/30 Clock-Hours

Students in this course will learn the major factors the effect a molding operations profitability. Students learn key factors that impact the total cost of a molded part and learn to use key measurables to estimate the total cost of molding. Students will also learn to identify, implement, and measure the results of both capital free and capital-based improvements to a molding operation.

Objectives:

- Explain cycle time, part design, material, and molded part quality effect an operations ability to make money
- Explain key principles of molding profitability to hypothetical employees
- Use a Pareto Chart to identify the most beneficial improvements
- Identify capital improvements to increase profitability
- Estimate product mold cost

- Justify capital improvements
- Measure improvements from capital implementations
- Identify and implement capital free improvements to increase profitability
- Demonstrate and improve tool change skills

Hot Runner Molding Solutions

1 Credit/30 Clock-Hours

Students in this course will learn the details of how hot runners' systems function, how they add value to the molding process, and what potential pitfalls come with hot runner systems. Students will learn about hot runner controllers, cables, and wiring. Hot runner system return on investment will be discussed for manifold systems, valve gate systems, and hot sprue bushings.

Objectives:

- Explain:
 - Thermocouple temperature measurement
 - Thermocouple positioning effects on temperature accuracy
 - Differences between a thermal gate and a valve gated hot tip
 - Gate vestige effect on the performance of molded parts
 - Hot runner systems reduction or elimination of wasted plastic
- Describe:
 - Benefits of hot runner molds over cold runner molds
 - Limitations of hot runner molds in comparison to cold runner molds
 - Gate stringing
 - Advantages of gate placement with hot runner molds
 - Sequential valve gating
- Demonstrate:
 - Startup and Shutdown procedures for a hot runner system
 - Color change process for a hot runner system
 - Calculation of material savings as a result of using a hot runner system
- Identify major components of hot runner systems
- List materials that can be problematic when using hot runners

Injection Molding Externship

2 Credits/90 Clock-Hours

The Injection Molding externship experience helps you transition from a student into a professional role by allowing you to demonstrate the knowledge, skills and professional attributes learned in the program while working in a professional setting. This experience takes place under the supervision of a qualified site supervisor and includes skill practice and evaluation. Faculty members periodically visit the externship site to evaluate your progress and performance. All program course work must be completed prior to enrolling in this course.

Objectives:

- Demonstrate professional and appropriate work habits
- Utilize appropriate Personal Protective Equipment (PPE)
- Demonstrate tool and mold change procedures
- Demonstrate injection molding processes

Introduction to 3D Printing

2 Credits/60 Clock-Hours

In this course students will learn how to be "makers" by using various types of 3D modeling software and imaging equipment, printing actual physical objects that they have designed and modeled themselves.

Objectives:

- Explain how technology shifts throughout history have made 3D printing possible
- Demonstrate the proper setup of a 3d printer
- Explain how to use the principles of Design Thinking and demonstrate design process documentation
- Navigate CAD software
- Explain how the designer's role has evolved over time and how it is likely to change as we move toward mass customization
- Be able to troubleshoot problems with 3d printing and 3d printers
- Successfully 3d print a student rendered design

Injection Molding Student Project

1 Credits/30 Clock-Hours

The Injection Molding Student Project course offers an opportunity to complete a project that is defined by you and your instructor to improve skills in a particular area. You will select the project from an issue that needs to be solved in the lab, the student's employer, or another business seeking help to solve an injection molding problem. Example projects include mold tryouts for prototype tooling, SMED tool change improvements, cycle time optimization, installation of cavity pressure transducers, etc. However, you may only select a project that can be completed in the lab, not at a remote location.

Objectives:

- Develop a project objective
- Create a plan to complete the student project including specific metrics for completion
- Develop a list of required tools, components, and materials required to complete the project
- Complete the project successfully by meeting the established metrics for completion

Fluid Power Hydraulics

2 Credits/60 Clock-Hours

This course is a real world, hands-on approach to learning hydraulic principles and circuitry. Topics include force and energy transmission, identifying American National Standards Institute (ANSI) and International Organization

for Standardization (ISO) hydraulic symbols and understanding how to read and draw the hydraulic schematics. In addition, students will use schematics to construct hydraulic circuits, hydraulic components construction, operation and symbols including prime movers, reservoirs, pumps, gauges, directional control valves, cylinders, motors, and filters.

Objectives:

- Identify hydraulic ANSI and ISO symbols
- Identify different types of cylinders, pumps, and motors
- Explain the difference between controls and actuators
- Install, troubleshoot, and repair hydraulic systems
- Identify the use of force, pressure, and area in a hydraulic system
- Identify GPM, volume, and rod speed in a hydraulic system

Advanced Process Development

2 Credits/60 Clock-Hours

Students in the course will be shown how to use in cavity pressure transducers and control systems to detect part defects, optimize processes, perform gate seal studies, and to create cavity pressure controller velocity to pressure switchover processes. Students will be shown what transducers are available and how they can be implemented in a mold. Students will be shown how to use and RJG

eDART to measure and control processes, operate a reject chute, and transfer a process from one press to another.

Objectives:

- List common types of in cavity sensors
- Explain the use of in cavity sensors to detect general part defects
- Describe
 - Applications of in cavity sensors
 - Pros and cons between direct and indirect sensors
 - Modifications required to install in cavity sensors
 - Applications for in cavity temperature and pressure sensors
 - Optimal sensor locations for both monitoring and control
 - Use of cavity pressure sensors to determine gate seal
 - Balancing of hot runner molds with cavity sensor controls
 - Benefits of using cavity data to match processes
 - Use of in cavity pressure sensors for gate seal determination
- Demonstrate:
 - Use of in cavity sensors to aid in the development of molding processes
 - Operation of data acquisition systems to monitor cavity and auxiliary sensors
 - Use of a baseline or template to compare processes
 - Development of processes that use cavity pressure for V to P switchover
 - Transfer of a processes between presses
- Determine feasibility of process matching between presses
 - Difference between strain gauge and piezo electric transducers

Industrial Robotics

3 Credits/90 Clock-Hours

In this course, students will practice basic sensing and locomotion principles as they control a robotic arm. The students will learn about the different types of robots that are available for industrial and servicing applications that will be used for selected activities from manual robot control to computer program mode. Robot maintenance and servicing activities provide skills for Maintenance Technicians and Engineers. Emphasis is placed with hands on activities using FANUC's R-30i A and R-30i B controllers with classroom M10ia, M1ia, and LR Mate industrial robots. Emphasis is also placed with hands on activities using ABB's S4 and IRC 5 controllers and classroom IRB 140 industrial robots. Certification for FANUC and ABB are available upon completion of course.

Objectives:

- Power up and Jog the Robot
- Recover from common program and robot faults
- Execute production operations
- Create, modify, and execute a material handling program
- Create and execute MACROs
- Monitor, force, and simulate input and output signals
- Backup and restore individual programs and files



Utah System of Higher Education
 Manufacturing Technology
 FY2023 / 13 Credits (390 Clock-Hours)

Manufacturing Technology			
Institutions: Davis			
<i>Certificate of Program Completion (Catalog Year: 2023, 13 Credits/390 Clock-Hours Required, CIP: 15.0613)</i>			
Core (12 Credits/400 Clock-Hours)		Credits	Clock-Hours
MANT 1010	Introduction to Manufacturing	3	90
MACH 1051	Blueprint Reading	1	30
MANT 1110	Composites for Manufacturing	1	30
IAMT 1201	Automation Maintenance Basics	2	60
MANT 1301	Welding for Manufacturing	2	60
INJM 1000	Basic Injection Molding Machine Operations	2	60
MANT 1600	Machining for Manufacturing	2	60



Utah System of Higher Education

Manufacturing Technology

FY2023 / 13 Credits (390 Clock-Hours)

PROGRAM DESCRIPTION

The Manufacturing Technology program prepares students for high-tech manufacturing careers. In addition to learning how to produce industrial products, students will get hands-on experience in automation, robotics, composite materials technology, plastic injection molding, and welding. Graduates will have foundational skills required for entry-level employment or may continue their education to specialize in any of the instructional areas.

Objectives:

Students will practice through hands-on experience, instructional videos, information sheets, and competency tests. Upon completion of this program or a given certificate, students will have received specialized training in manufacturing technology. Students will learn and apply the following while enrolled in the Manufacturing Technology program:

- Demonstrate basic safety practices used in any manufacturing facility
- Read and use common measuring tools used in manufacturing
- Practice safe and proper use of basic hand and power tools
- Complete a variety of introductory manufacturing assignments using blueprints
- Recognize and work within multiple technology industries

COURSE DESCRIPTIONS

Introduction to Manufacturing

3 Credits/90 Clock-Hours

Introduction to Manufacturing explores common manufacturing processes and how they work together, including automation, machining, composites, and welding. During this course, you will become familiar with measuring tools, hand tools, power tools, and blueprints that are currently used in the various industries through hands-on labs. You will be required to demonstrate personal and machine safety as you complete a variety of activities.

Objectives:

- Demonstrate basic safety practices used in any manufacturing facility
- Use shop math to solve manufacturing related problems
- Read and use common measuring tools used in manufacturing
- Practice safe and proper use of basic hand and power tools
- Describe the basic operation of Lathes and Milling machines
- Become familiar with each industry and how they work together

Blueprint Reading

1 Credit/30 Clock-Hours

Blueprint reading for machinists will familiarize students with how to read and interpret mechanical blueprints. Topics covered in this course include the alphabet of lines, interpreting title block data, reading dimensions, tolerances, and surface finish, and interpreting multiple-view drawings, with sectional, auxiliary and projected views.

Objectives:

- Identify line, lettering, sketching, dimensioning, and title standards used in drafting
- Identify symbols and views used on blueprints
- Calculate missing dimensions on a drawing

- Identify information necessary for production on a drawing
- Define terminology and processes related to manufacturing drawings
- Describe the function of drawings used in manufacturing
- Demonstrate the proper use of linework as they pertain to drawings specifically created for the machining industry
- From a three-dimensional part, determine the various views associated with that part
- Demonstrate how to apply and read dimensioning elements associated with machined parts
- Determine the differences between the American National Standards Institute (ANSI) and the International Standards Organization (ISO)

Composites for Manufacturing

1 Credit/30 Clock-Hours

Composite Basics introduces the basic materials, tools, vocabulary, and safety practices used in the composites industry. Throughout this course, you will examine various composite materials, chemicals, tools, and the procedures and processes of fabrication. You will also practice proper shop etiquette and cleaning.

Objectives:

- Identify the various businesses that employ composite technicians
- Describe the different composite applications within the industry
- Explain the role composites play in today's marketplace
- Identify the various fabric types incorporated in laminations and describe how the different fabrics interact
- Compare several resin systems and identify the parameters necessary to use each resin system
- Describe epoxy resin systems
- Demonstrate the ability to incorporate general shop safety practices
- Identify shop areas and processing equipment by name
- Explain Safety Data Sheets

Automation Maintenance Basics

2 Credits/60 Clock-Hours

Maintenance Basics introduces the basic concepts and terminology used in Automation and Robotics. Throughout this course, you will study basic electrical, Electrical Motor Controls, Programmable Logic Controllers (PLC), HVAC, Pneumatics, Hydraulics, Robotics and Troubleshooting skills.

Objectives:

- Identify maintenance principles including safety and service and repair of electrical systems.
- Discuss electronics and PLCs, HVAC systems
- Describe mechanical systems, robotic systems, and fluid power systems of automation maintenance aspects

Welding for Manufacturing

2 Credits/60 Clock-Hours

Welding for Manufacturing includes the basic knowledge of Gas Metal Arc Welding (GMAW) and Shielded Metal Arc Welding (SMAW). During this course, you will study welding safety; protection, accident prevention, and troubleshooting. You will practice set-up, operation of equipment, positions, executions, and the workmanship needed for a basic weld.

Objectives:

- Describe oxyfuel cutting process terms
- Demonstrate proper equipment setup, usage, cleaning, and break-down

- Discuss and conduct safety inspections of equipment and accessories
- List and describe oxyfuel cutting equipment
- Perform setup, lighting, and use of oxyfuel cutting equipment
- Demonstrate various cutting techniques including straight cuts, beveling, and gouging on various base metals
- Name key terms for GMAW
- Make GMAW-S (Short Circuit) Fillet Welds the 2F position
- Make GMAW-S (Short Circuit) Groove Welds in the 2G position
- Make GMAW-S (Short Circuit) V Groove Welds in the 2G position
- List key terms for SMAW
- Perform Fillet welds on mild carbon steel with E7018 welding
- Perform Groove welds in the Flat (1G) and horizontal (2G) with 7018

Basic Injection Molding Machine Operations

2 Credits/60 Clock-Hours

Basic Injection Molding Machine Operations explores how to operate an injection molding machine in a production environment including defect identification, and concepts of quality manufacturing. During this course, you will examine general safety, as well as safety that is specific in an injection molding environment. You will also de-gate and count parts, as well as document running conditions and production numbers while operating a molding cell.

Objectives:

- Identify and properly utilize Personal Protective Equipment (PPE)
- Explain and demonstrated Lock-Out, Tag-Out procedures
- Identify the major components of an injection molding machine
- Describe the function of the major components of an injection molding machine
- Explain and demonstrate the basic injection molding cycle
- Use molding machine controls to operate a molding machine
- Identify basic part defects and list reasons why defects are a problem for molders and customers
- Perform basic part measurement using calipers and a scale
- Explain and perform visual inspection of injection molded parts
- Use quality documents to record critical quality metrics
- Describe mold changing steps and create basic tool change instructions
- Discuss the importance of process setup sheets and production documentation
- Use a process setup sheet to verify the settings of a molding machine and auxiliaries
- Record key data during machine operation on production documents

Machining for Manufacturing

2 Credits/60 Clock-Hours

CNC Machining for Manufacturing will cover the basic procedures to run a CNC mill and Lathes encountered in the machine shop. During this course, you will study topics including instruction in machine startup, loading programs, setting tool offsets, work offsets and basic G code programming. We will also cover basic Programming using a CAM program topic will include basic part creation and programming.

Objectives:

- Use G code programming to create parts
- Create basic tool path using CAM software
- Identify safe practices and clean up procedures in a machine shop

- Demonstrate accurate use and reading of steel rules, micrometers, and calipers to inspect parts while in the machine.
- Demonstrate proper feeds and speeds
- Design parts using CAD software
- Identify proper milling and turning cutters and their application
- Perform basic turning and milling operations



Utah System of Higher Education

Biotechnology

FY2023 / 28 Credits (900 Clock-Hours)

Biotechnology			
Institutions: Dixie			
<i>Certificate of Program Completion (Catalog Year: 2023, 28 Credits/900 Clock-Hours Required, CIP: 41.0101)</i>			
Core (28 Credits/900 Clock-Hours)		Credits	Clock-Hours
PREF XXXX	Fundamentals of Biotechnology	3	90
PREF XXXX	Aseptic Technique	1	30
PREF XXXX	Chemical Instrumentation and Laboratory Techniques	3	90
PREF XXXX	Data Analysis	3	90
PREF XXXX	Quality Control and Manufacturing Practices	3	90
PREF XXXX	DNA Manipulation and Analysis	3	90
PREF XXXX	Protein Purification and Analysis	3	90
PREF XXXX	Cell Culture Techniques	2	60
PREF XXXX	Advanced Nucleic Acid Laboratory	3	90
PREF XXXX	Externship	4	180



Utah System of Higher Education

Biotechnology

FY2023 / 28 Credits (900 Clock-Hours)

PROGRAM DESCRIPTION

The Biotechnology Certificate prepares students to enter into the ever-expanding fields of biotechnology. The possibilities are vast for a career in this area and include genomic mapping and research, pharmaceutical or nutraceutical development, biological research and development, and many of the other fields under this discipline. This program will give students the background to continue on to lab technician work or articulate to another institution to continue their education.

Objectives:

- Fundamentals in Biology
- Laboratory & manufacturing practices
- Laboratory Practice
- Explore and analyze DNA

COURSE DESCRIPTIONS

Fundamentals of Biotechnology

3 Credits/90 Clock-Hours

An introductory course to the biotechnology certificate. Students will be introduced to the many fields and applications of biotechnology. Biology and Chemistry fundamentals will be reviewed along with an overview of the central dogma of biology. Other biotech topics include recombinant DNA, proteins, bioremediation, and bioethics.

Objectives:

- Introduction to Biotechnology
- Biology Fundamentals
- Chemistry Fundamentals
- Introduction to Genes and Genomes
- Recombinant DNA
- Proteins
- Plant Biotechnology
- Animal Biotechnology
- DNA Fingerprinting and Forensics Analysis
- Bioremediation
- Biotechnology Regulations
- Ethics

Laboratory Safety

1 Credits/30 Clock-Hours

The safety course covers general laboratory safety, documentation, and signage. Students will learn about personal protection equipment, safe handling of material, safety data sheets, government regulations, and fire safety. Students will also certify in CPR and first aid.

Objectives:

- Introduction to a Safe Workplace
- Personal Protective Equipment
- Ergonomics
- Laboratory Safety
- Chemical Safety
- Fire Safety
- Safety with Biological Materials
- Safety Data Sheets
- OSHA and Government Regulations



Utah System of Higher Education

Biotechnology

FY2023 / 28 Credits (900 Clock-Hours)

- CPR and First Aid
- Safety Final

Pipette Calibration and Technique

1 Credits/30 Clock-Hours

Precision and accuracy are important skills mastered through BTEC 1100. Students will become proficient in different types and sizes of pipettes and learn proper care and usage.

Objectives:

- Pipette Techniques
- Calibration and Maintenance of Pipette
- Pipetting Precision
- Pipetting Final

Aseptic Technique

1 Credit/30 Clock-Hours

Culturing and isolating organisms will be the focus of this course. Students will become proficient in isolation, sterilization, and culturing of organisms.

Objectives:

- Media Manufacturing
- Cell Culture
- Sterilization Technique
- Aseptic Isolation
- Aseptic Final

Chemical Instrumentation and Laboratory Techniques

3 Credits/90 Clock-Hours

Biotechnology in manufacturing will be a focus in BTEC 1300. Students will learn Good Laboratory Practices, inventory controls, pharmaceutical development, and quality of biotechnological products.

Objectives:

- Good Laboratory Practices
- Inventory Controls
- Pharmaceutical Development and Quality Systems
- Risk Management
- Quality of Biotechnological Products
- Pharmacopoeias

Data Analysis

3 Credits/90 Clock-Hours

Analysis of the data collected in laboratory procedures is the focus of this course. Students will record and analyze data in proportional relationships, through graphing, and statistics. Weight, volume, temperature, light, and units involved in different stages of processing including conversions will be included.

Objectives:

- Basic Math Techniques
- Proportional Relationships
- Relationships and Graphing
- Descriptive Statistics
- Quality Laboratory Measurements
- Instrumental Methods and Electricity
- Weight



Utah System of Higher Education

Biotechnology

FY2023 / 28 Credits (900 Clock-Hours)

- Volume
- Temperature
- Light
- Selected Ions, pH, and Conductivity

Quality Control and Manufacturing Practices

4 Credits/120 Clock-Hours

Laboratories benefit from efficient and streamlined processes. Students will complete the Green Belt Level of Lean Six Sigma and can become certified. Federal regulations, standard operating procedures, and current good manufacturing practices contribute to the quality control in biotechnological manufacturing.

Objectives:

- Lean Six Sigma Introduction
- Lean Six Sigma Value Stream Mapping
- Lean Six Sigma Data Collection
- Lean Six Sigma Statistics and Data Displays
- Lean Six Sigma Variation Analysis
- Lean Six Sigma Identifying and Verifying Causes
- Lean Six Sigma Selecting and Testing Solutions
- Lean Six Sigma Green Belt Certification
- Federal Regulations
- Current Good Manufacturing Practices
- Standard Operating Procedures

DNA Manipulation and Analysis

4 Credits/120 Clock-Hours

DNA structure and synthesis are main processes used for many purposes in biotechnology. Students will separate biological processes through filtration, centrifugation, and bio-separations. Students will analyze DNA sequences, work with transformation and cloning, and use biotechnology process like Polymerase chain reaction and gel electrophoresis.

Objectives:

- DNA Structure and Analysis
- Filtration
- Centrifugation
- Bioseparations
- Recombinant DNA
- Sequence Analysis of Individual Genomes
- Bacterial Transformation
- Polymerase Chain Reaction
- DNA Gel Electrophoresis

Protein Purification and Analysis

4 Credits/120 Clock-Hours

Students will analyze protein structure, quantitation, purification, and size; along with protein use in biofuels, immunology, and immunoassays. The culmination of the program will be the Biotechnician Certified Accreditation Exam (BASE) which includes both a written and practical exam.

Objectives:

- Protein Structure and Analysis
- Protein Quantitation
- Protein Purification



Utah System of Higher Education

Biotechnology

FY2023 / 28 Credits (900 Clock-Hours)

- Size Chromatography
- Page Electrophoresis
- Biofuel
- Immunological Application
- Immunoassays

Externship

4 Credits/180 Clock-Hours

Students will participate in an externship with a local company and apply the things they have learned in the classroom and lab in a real-world setting.

Objectives:

- Demonstrate competence in real world situations



Utah System of Higher Education
 Electrical Apprenticeship
 FY2023 / 24 Credits (720 Clock-Hours)

Electrical Apprenticeship			
Institutions: Bridgerland, Davis, Dixie, Mountainland, Ogden-Weber, Salt Lake, Southwest, Tooele, Uintah Basin, USU-Eastern			
<i>Certificate of Program Completion (Catalog Year: 2023, 24 Credits/720 Clock-Hours Required, CIP: 46.0302)</i>			
Core (24 Credits/720 Clock-Hours)		Credits	Clock-Hours
PREF XXXX	Electrician Apprentice IA	3	90
PREF XXXX	Electrician Apprentice IB	3	90
PREF XXXX	Electrician Apprentice IIA	3	90
PREF XXXX	Electrician Apprentice IIB	3	90
PREF XXXX	Electrician Apprentice IIIA	3	90
PREF XXXX	Electrician Apprentice IIIB	3	90
PREF XXXX	Electrician Apprentice IVA	3	90
PREF XXXX	Electrician Apprentice IVB	3	90



Utah System of Higher Education

Electrical Apprenticeship

FY2023 / 24 Credits (720 Clock-Hours)

PROGRAM DESCRIPTION

The Electrical Apprenticeship program provides a solid understanding of the National Electrical Code (NEC), its layout, the requirements for different electrical systems, and the components of those systems. This program discusses the risks involved with electricity and electrical systems as well as the safety equipment and measures that are in place to protect electricians and the general public alike.

Objectives:

- Apply of the National Electrical Code (NEC)
- Navigate the National Electrical Code (NEC)
- Calculate the sizes of different electrical system parts
- Explain the application of A/C and D/C electrical theory
- Explain Electrical Safety procedures, processes, and equipment
- Wire electrical circuits per National Codes and safety regulations

COURSE DESCRIPTIONS

Electrician Apprentice IA

3 Credits / 90 Clock-Hours

The Electrician Apprentice IA course establishes a solid foundation in electrical fundamentals and the study of basic electrical theory. This course addresses math applications as they relate to the electrical field. In this course, students will use the National Electrical Code (NEC) to apply code requirements to electrical systems. Students will learn and practice in the basics of conduit bending. Students will be introduced to electrical and jobsite hazards and workplace safety.

Objectives:

- Demonstrate a proficiency in general math skills with an emphasis on how they relate to the electrical field
- Identify electrical and jobsite hazards
- Explain workplace safety
- Apply Mathematical Principles to Conduit Bending
- Demonstrate a practical application of conduit bending
- Explain the Fundamentals of Electrical Theory
- Explain the Fundamentals of Electrical Circuitry
- Demonstrate the application of the National Electrical Code (NEC) Articles 090-240
- Demonstrate how to navigate the National Electrical Code (NEC) Articles 090-240

Electrician Apprentice IB

3 Credits / 90 Clock-Hours

The Electrician Apprentice IB course continues the study of electrical theory and its application within the electrical field. In this course, students will learn how devices and electrical systems work. Students will also explore lock out tag out, learn what makes a qualified person, and become more familiar with the National Electrical Code (NEC).

Objectives:

- Apply the fundamentals of electrical theory
- Apply the fundamentals of electrical circuitry
- Explain the definition of a qualified person
- Explain responsibilities and risks of qualified persons
- Demonstrate principles and procedures of lock out tag out.

- Demonstrate the application of the National Electrical Code (NEC) Articles 300-450
- Demonstrate how to navigate the National Electrical Code (NEC) Articles 300-450

Electrician Apprentice IIA

3 Credits / 90 Clock-Hours

The Electrician Apprentice IIA course discusses single-phase and three-phase alternating current (AC) power systems, inductance, capacitance, reactance, power factor, and power correction. In this course, students will begin a more comprehensive analysis of National Electrical Code (NEC) requirements and calculations. They will explore the NEC requirements for wiring methods and installations of electrical systems as well as electrical safety in the use of energized equipment.

Objectives:

- Show proficiency in calculating properties of an AC circuit.
- Demonstrate proper use of hand tools and electrical equipment in practice live applications
- Demonstrate proficiency in applying and calculating the sizing of Branch circuits, feeders, services, and load calculations

Electrician Apprentice IIB

3 Credits / 90 Clock-Hours

The Electrician Apprentice IIB course continues the comprehensive analysis of the National Electrical Code (NEC). In this course, students will evaluate the functions, uses, and calculations for direct current (DC) and alternating current (AC) motors, transformers, and other equipment. They will be instructed in electrical safety regarding Personal Protective Equipment (PPE) clothing requirements.

Objectives:

- Identify the types and voltages of transformers
- Calculate values related to transformers
- Apply the NEC with emphasis in codes regarding Motors, Transformers, and other electrical equipment
- Identify types, categories, and ratings of PPE clothing
- Show applications of types, categories, ratings of Personal Protective Equipment (PPE)

Electrician Apprentice IIIA

3 Credits / 90 Clock-Hours

The Electrician Apprentice IIIA course discusses the roles of bonding and grounding in electrical systems per National Electrical Code (NEC) requirements. In this course, students will be shown the different parts, functions, and calculations for grounding and bonding. Students will explore the rules that apply to different electrical related boundaries set up by the National Fire Protection Agency (NFPA).

Objectives:

- Describe the NEC requirements regarding grounding and bonding
- Calculate sizes of grounding and bonding conductors
- Explain the various conductors and properties of grounding and bonding contained in an electrical system
- Explain NFPA rules to limit approach, restricted approach, and arc flash boundaries

Electrician Apprentice IIIB

3 Credits / 90 Clock-Hours

The Electrician Apprentice IIIB course explores basic and complex electrical motor control systems and their respective fundamental concepts, diagrams, and applications. Students will examine the wiring and protecting of motors and motor circuits per National Electrical Code (NEC) requirements.

Objectives:

- Identify electrical symbols and diagrams pertaining to motors and motor control circuits
- Demonstrate how to wire a control circuit based on a diagram
- Identify various control devices
- Explain application of various control devices.
- Apply proper safety protocols around motor controls

Electrician Apprentice IVA**3 Credits / 90 Clock-Hours**

The Electrician Apprentice IVA course explores the basic skills necessary for becoming crew leader and managing electrical hazards. In this course, students will be instructed in special occupancies, special equipment, special conditions and communication systems and their respective National Electrical Code (NEC) requirements.

Objectives:

- Demonstrate the application of the National Electrical Code (NEC) Chapters 5-8
- Demonstrate how to navigate the National Electrical Code (NEC) Chapters 5-8
- Explain the costs related to safety
- Perform a hazard / risk assessment
- Explain Utah licensing requirements and rules

Electrician Apprentice IVB**3 Credits / 90 Clock-Hours**

The Electrician Apprentice IVB course, students will review all concepts from the previous years of electrical apprenticeship education. This course prepares individuals for the Utah State Journeyman qualifying examinations. Upon completion, students will demonstrate journeyman-level understanding of the electrical field as a whole.

Objectives:

- Apply knowledge of National Electrical Code (NEC) to pass a comprehensive review
- Apply knowledge of electrical theory to pass a comprehensive review
- Apply knowledge of safety to pass a comprehensive review



Utah System of Higher Education
Emergency Medical Technician
FY2023 / 6 Credits (186 Clock-Hours)

Emergency Medical Technician			
Institutions: Bridgerland, Davis, Dixie, Mountainland, Salt Lake, Snow, Southwest, USU-Eastern			
<i>Certificate of Program Completion (Catalog Year: 2023, 6 Credits/186 Clock-Hours Required, CIP: 51.0910)</i>			
Core (6 Credits/186 Clock-Hours)		Credits	Clock-Hours
PREF XXXX	Emergency Medical Technician	6	186



Utah System of Higher Education

Emergency Medical Technician
FY2023 / 6 Credits (186 Clock-Hours)

PROGRAM DESCRIPTION

The Emergency Medical Technician program provides training for out-of-hospital emergency medical care and transportation of critical and emergent patients who access the emergency medical services (EMS) system. Emergency Medical Technicians (EMTs) have basic knowledge and skills necessary to stabilize and safely transport patients ranging from non-emergency and routine medical transports to life threatening emergencies. EMTs function as part of a comprehensive EMS response system, under medical oversight. EMTs perform interventions with the basic equipment typically found on an ambulance. EMTs are a critical link between the scene of an emergency and the health care system.

Objectives:

Upon program completion, students will be able to:

- Apply fundamental knowledge of the anatomy and function of all human systems to the practice of EMS
- Use foundational anatomical and medical terms and abbreviations in written and oral communication with colleagues and other health care professionals
- Apply fundamental knowledge of the pathophysiology of respiration and perfusion to patient assessment and management
- Apply fundamental knowledge of lifespan development to patient assessment and management
- Properly administer or assist in administering medications to a patient during an emergency
- Utilize fundamental knowledge of the EMS system, safety/well-being of the EMT, and medical/legal and ethical issues to the provision of emergency care
- Apply knowledge (fundamental depth, foundational breadth) of anatomy and physiology to patient assessment and management to assure a patent airway, adequate mechanical ventilation, and respiration for patients of all ages
- Interpret scene information and patient assessment findings (scene size-up, primary and secondary assessment, patient history, reassessment) to guide emergency management
- Provide basic emergency care and transportation based on assessment findings for an acutely ill patient
- Apply a fundamental knowledge of the causes, pathophysiology, and management of shock, respiratory failure or arrest, cardiac failure or arrest, and post-resuscitation management
- Provide basic emergency care and transportation based on assessment findings for an acutely injured patient
- Utilize principles of growth, development, aging and assessment findings to provide basic emergency care and transportation for a patient with special needs
- Perform in accordance with operational roles and responsibilities to ensure patient, public, and personnel safety when responding to an emergency

COURSE DESCRIPTIONS

Emergency Medical Technician

6 Credits/186 Clock-Hours

The Emergency Medical Technician course provides training on out of hospital emergency medical care and transportation for critical and emergent patients who access the emergency medical services (EMS) system. Emergency Medical Technicians (EMTs) have basic knowledge and skills necessary to stabilize and safely transport patients ranging from non-emergency and routine medical transports to life threatening emergencies. EMTs function as part of a comprehensive EMS response system, under medical oversight. EMTs perform interventions with the basic equipment typically found on an ambulance. EMTs are a critical link between the scene of an emergency and the health care system. This course includes 6 hours of externship hours to be completed outside of the classroom time.

Objectives:

- Apply fundamental knowledge of the anatomy and function of all human systems to the practice of EMS
- Use foundational anatomical and medical terms and abbreviations in written and oral communication with colleagues and other health care professionals
- Apply fundamental knowledge of the pathophysiology of respiration and perfusion to patient assessment and management
- Apply fundamental knowledge of lifespan development to patient assessment and management
- Use simple knowledge of the principles of illness and injury prevention in emergency care
- Properly administer or assist in administering medications to a patient in an emergency
- Apply fundamental knowledge of the EMS system, safety/well-being of the EMT, and medical/legal and ethical issues to the provision of emergency care
- Apply knowledge (fundamental depth, foundational breadth) of anatomy and physiology to patient assessment and management to assure a patent airway, adequate mechanical ventilation, and respiration for patients of all ages
- Interpret scene information and patient assessment findings including scene size-up, primary and secondary assessment, patient history, and reassessment, to guide emergency management
- Provide basic emergency care and transportation based on assessment findings for an acutely ill patient
- Apply a fundamental knowledge of the causes, pathophysiology, and management of shock, respiratory failure or arrest, cardiac failure or arrest, and post-resuscitation management
- Provide basic emergency care and transportation based on assessment findings for an acutely injured patient
- Utilize principles of growth, development, aging and assessment findings to provide basic emergency care and transportation for a patient with special needs
- Perform in accordance with operational roles and responsibilities to ensure patient, public, and personnel safety when responding to an emergency



Utah System of Higher Education
 Digital Marketing & Analytics
 FY2023 / 20 Credits (600 Clock-Hours)

Digital Marketing & Analytics			
Institutions: Mountainland			
<i>Certificate of Program Completion (Catalog Year: 2023, 20 Credits/600 Clock-Hours Required, CIP: 52.1404)</i>			
Core (20 Credits/600 Clock-Hours)		Credits	Clock-Hours
DGMA 0101	Introduction to Marketing	2	60
DGMA 0111	Marketing Design	2	60
DGMA 0102	Content Marketing & Marketing Analytics	4	120
DGMA 0103	Email Marketing	2	60
DGMA 0104	Search Engine Optimization	2	60
DGMA 0105	Digital Advertising	3	90
DGMA 0106	Social Media Marketing	3	90
DGMA 0107	Advanced Digital Marketing	2	60



Utah System of Higher Education

Digital Marketing & Analytics
FY2023 / 20 Credits (600 Clock-Hours)

PROGRAM DESCRIPTION

In the Digital Marketing and Analytics program, students will learn the fundamental principles of marketing, strategy, and best practices. Students will learn the day-to-day tasks of the modern digital marketer from lectures, guest speakers, presentations, and hands-on application. Through instruction and hands-on practice, students will learn and test their skills in Search Engine Optimization, Search Engine Marketing, Digital Advertising, Social Media Marketing, Content Marketing, and Email Marketing.

Objectives:

- Demonstrate a working knowledge of the fundamentals of digital marketing and marketing analytics
- Define key digital marketing and analytics terms and definitions
- Assess marketing data using industry tools and best practices
- Create strategic digital marketing plans following industry suggested best practices
- Implement a digital marketing strategy in a business
- Complete industry certifications to show competencies in each digital marketing vertical

COURSE DESCRIPTIONS

Introduction to Marketing

2 Credit/60 Clock-Hours

The Introduction to Marketing course is designed to help students become proficient in the fundamentals and best practices of marketing. The course will cover key digital marketing terms, marketing research, buyer personas, positioning, buyer behaviors, brand management, product management, and pricing. Through lecture, guest speakers, presentations, and hands-on application, students will become proficient in the skills needed to be a modern-day digital marketer.

Objectives:

- Demonstrate fundamental marketing skills needed to pursue an education in digital marketing
- Display an understanding of marketing key terms and definitions
- Assess marketing strategies through industry case studies
- Implement marketing best practices and strategies through hands-on business applications
- Present marketing plans based on industry best practices

Marketing Design

2 Credit/60 Clock-Hours

The Marketing Design course will help students become familiar with graphic design concepts and platforms. The course will cover marketing design principles, design best practices, and popular graphic design platforms. Students will learn marketing design through lectures, guest speakers, presentations, and hands-on applications.

Objectives:

- Demonstrate knowledge of graphic design key terminology and definitions
- Explain why marketing design principles are an important part of a company's marketing strategy
- Display an understanding of how design affects businesses marketing efforts
- Break down the differences between good and bad marketing content
- Create marketing content on today's most popular platforms

Content Marketing & Marketing Analytics

4 Credits/120 Clock-Hours

The Content Marketing & Marketing Analytics course is designed to help students become proficient in content marketing, web design, and marketing analytics using today's leading platforms. The course will cover content marketing best practices, content marketing strategy, creating marketing content, website design, website building, website management, tracking marketing analytics, and measuring and reporting on marketing efforts. Students will learn through lectures, guest speakers, presentations, and hands-on applications the best practices and strategies of content marketing.

Objectives:

- Explain why content marketing is an important part of a company's overall marketing strategy
- Demonstrate knowledge of content marketing key terminology and definitions
- Analyze when and how to use content marketing to optimize a customer buyer's journey
- Execute content marketing best practices and strategies through content creation
- Demonstrate proficiency in using content marketing platforms and tools
- Build content promotion strategies for businesses
- Create and manage a personal website or portfolio
- Analyze marketing data to make informed future business decisions
- Demonstrate proficiency in using leading marketing analytics tools

Email Marketing

2 Credits/60 Clock-Hours

The Email Marketing & Customer Relationship Management course is designed to help students become proficient in email marketing, using today's leading platforms. The course will cover email marketing best practices, email marketing strategy, creating emails, lead generation, creating landing pages, tracking email marketing analytics, and email marketing automation. Students will learn through lectures, guest speakers, presentations, and hands-on applications the best practices and strategies of email marketing.

Objectives:

- Explain why email marketing is an important part of a company's overall marketing strategy
- Demonstrate knowledge of email marketing key terminology and definitions
- Analyze when and how to use email marketing to maximize their customer experience and drive more website visits, leads and sales
- Execute email marketing best practices and strategies through hands-on projects
- Create a variety of different email marketing content
- Demonstrate proficiency in using email marketing tools and platforms
- Execute and design email marketing automation workflows for contact management

Search Engine Optimization

2 Credits/60 Clock-Hours

The Search Engine Optimization course is designed to help students become proficient in SEO using today's leading platforms. The course will cover search engine optimization best practices, on-site SEO, off-site SEO, technical SEO, SEO audits, and today's leading SEO tools. Students will learn through lectures, guest speakers, presentations, and hands-on applications the best practices and strategies of SEO.

Objectives:

- Explain why search engine optimization is an essential part of a company's overall marketing strategy
- Demonstrate knowledge of search engine optimization key terminology and definitions
- Analyze when and how to use search engine optimization to increase website rankings
- Execute search engine optimization best practices and strategies through hands-on projects
- Manage on-site, off-site, and technical search engine optimization on their personal website/portfolio

- Perform and present website audits for businesses
- Demonstrate proficiency in using search engine marketing tools

Digital Advertising

3 Credits/90 Clock-Hours

The Digital Advertising course is designed to help students become proficient in Search Engine Marketing using today's leading platforms. The course will cover digital advertising best practices, bidding strategies, search ads, display ads, video ads, digital ads optimization analyzing ad performance, and current leading digital advertising platforms. Students will learn through lectures, guest speakers, presentations, and hands-on applications the best practices and strategies of Digital Advertising.

Objectives:

- Explain why digital advertising is an important part of a company's overall marketing strategy
- Demonstrate knowledge of digital advertising key terminology and definitions
- Analyze when and how to use digital advertising to drive website traffic, leads, and sales
- Execute digital advertising best practices and strategies through hands-on projects
- Create digital ads on current leading advertising platforms
- Break down digital advertising results and key metrics for improving results
- Demonstrate proficiency in using digital advertising tools

Social Media Marketing

3 Credits/90 Clock-Hours

The Social Media Marketing course is designed to help students become proficient in organic and paid social media marketing on today's leading platforms. This course will cover social media branding, social media strategy, social media management, paid social media marketing, influencer marketing, social media tools, and social media analytics. Students will learn through lectures and hands-on training the best practices and strategies of social media marketing.

Objectives:

- Explain why social media marketing is an important part of a company's overall marketing strategy
- Demonstrate knowledge of social media marketing key terminology and definitions.
- Analyze when and how to use social media marketing to maximize return on investment
- Execute social media marketing best practices for today's most popular platforms
- Demonstrate proficiency in using social media marketing platforms and tools
- Create and optimize social media ad campaigns
- Break down and report on social media analytics

Advanced Digital Marketing

2 Credits/60 Clock-Hours

The Advanced Digital Marketing course is designed to help students become proficient in advanced digital marketing tactics, best practices, and strategies. The course will cover advanced marketing strategies for content marketing, email marketing, search engine optimization, conversion rate optimization, digital advertising, social media marketing, or marketing analytics. Students will learn through lectures, presentations, and hands-on training these advanced marketing skills.

Objectives:

- Demonstrate knowledge of advanced digital marketing skills needed for the jobs of today
- Research and present new digital marketing tools, skills, or best practices
- Implement ways to stay up-to-date in chosen digital marketing specialty
- Create a digital marketing resume with the skills and knowledge learned in the program
- Complete mock interviews for specific digital marketing jobs



Utah System of Higher Education
Limited X-Ray Technician
FY2023 / 10 Credits (345 Clock-Hours)

Limited X-Ray Technician			
Institutions: Mountainland			
<i>Certificate of Program Completion (Catalog Year: 2023, 10 Credits/345 Clock-Hours Required, CIP:51.0911)</i>			
Core (10 Credits/345 Clock-Hours)		Credits	Clock-Hours
LMRT 1020	Radiographic Procedures and Patient Care	4	120
LMRT 1030	Radiographic Core	3	90
LMRT 1065	Limited X-Ray Technician Clinicals	3	135



Utah System of Higher Education

Limited X-Ray Technician

FY2023 / 10 Credits (345 Clock-Hours)

PROGRAM DESCRIPTION

In this program, students will be instructed in the classroom and laboratory settings to learn on-the-job skills of being an x-ray tech, and then apply that knowledge in a clinical setting. Students will learn the anatomy of the human body, the types of joints, and how to position their patients for the specific exam. Students will learn how to provide exceptional patient care to those they come in contact with. Students will also learn how x-rays are produced, the behind the scene processes that all x-ray images go through, and the post processing digital techniques. The experience students will gain at their clinical sites will put them on the path to a successful career as a Limited X-ray Technologist.

Objectives:

- Demonstrate x-ray procedures from the top of the skull down to the lower extremities
- Provide and perform exceptional patient care to their patients, patient families, and coworkers
- Explain how the x-ray tube works, the physics behind the electrical energy and x-rays, and how x-rays are produced
- Describe the digital imaging techniques, post processing techniques, and the technical factors that are used for each exam
- Perform 135 hours of on the job training hours throughout the course of the program

COURSE DESCRIPTIONS

LMRT Procedures and Patient Care

4 Credits/120 Clock-Hours

This course is designed to provide students with the knowledge and skills to take x-ray images of the chest, upper and lower limb, shoulder girdle, spine, skull, and podiatry exams. During this course students will practice taking x-rays, identifying anatomy and topical landmarks, and how to position the patient and the x-ray tube for each exam. Students will practice using post processing techniques when completing the entire process of start to finish when taking an x-ray.

Objectives:

- Demonstrate their anatomy and landmark knowledge of the chest, upper and lower limb, shoulder girdle, spine, skull
- Simulate the routine and special positions and projections for the chest, upper and lower limb, shoulder girdle, spine, skull, and podiatry procedures in both the lecture and lab settings
- Explain patient care procedures to be able to care for patients and their individual needs
- Use medical terminology for body positions and imaging projections
- Identify the safety protocols for each x-ray exam

LMRT Radiographic Core

3 Credits/90 Clock-Hours

This course is designed to teach students about x-ray imaging and exposure techniques, radiation protection, radiobiology, and radiographic physics. Students will learn how to use digital imaging techniques and post processing techniques in both the lab and in the classroom. This course will assist students in understanding the core methods of radiography.

Objectives:

- Describe the properties and characteristics of x-rays
- Describe the equipment and components of an x-ray room
- Demonstrate patient protection techniques to decrease the radiobiological risks
- Demonstrate digital imaging and post processing techniques

- Describe radiation physics and x-ray production circuits
- Use the key features in the digital image process and in post processing

LMRT Clinicals I**3 Credits/135 Clock-Hours**

This course is designed for students to take their knowledge of what they learned in the classroom and laboratory and apply it to their clinical site. Students will position patients, use proper radiation protection techniques, and take x-rays under the supervision of the x-ray department staff. Students will learn the job of an X-ray technologist through real world experiences.

Objectives:

- Use proper radiation protection techniques during each x-ray exam
- Execute x-ray imaging exams from start to finish under the direction of the x-ray department staff
- Select technical factors to produce quality diagnostic images with the mindset of ALARA
- Provide patient-centered care for all patients regardless of age, gender, disability, special needs, ethnicity, or culture
- Pass off X-ray competencies for the chest, upper and lower limb, shoulder girdle, spine, skull



Utah System of Higher Education
Radiography Technology
FY2023 / 42 Credits (1600 Clock-Hours)

Radiography Technology			
Institutions: Mountainland			
<i>Certificate of Program Completion (Catalog Year: 2023, 42 Credits/1600 Clock-Hours Required, CIP: 51.0911)</i>			
Core (22 Credits/720 Clock-Hours)		Credits	Clock-Hours
BLSH 1000	AHA Basic Life Support for Healthcare Providers	0	5
RADT 1020	Rad. Anatomy & Procedures	3	90
RADT 1030	Radiographic Imaging and Exposure Techniques	3	90
RADT 1050	Patient Care	1	30
RADT 1070	Rad. Clinicals I	6	270
RADT 1110	Radiology Physics	1	30
RADT 1120	Rad. Anatomy & Procedures II	3	90
RADT 1130	Radiographic Imaging II	2	60
RADT 1060	Rad Protection and Radiobiology	1	30
RADT 1170	Rad. Clinicals II	6	270
RADT 2010	Rad. And Pediatric Pathology	1	30
RADT 2020	Rad. Anatomy & Procedures III	2	60
RADT 2030	Alternate Modality and Sectional Anatomy	2	60
RADT 2070	Rad. Clinicals III	6	270
RADT 2150	Registry Review (online)	3	90
RADT 2170	Rad. Clinicals IV	2	125



Utah System of Higher Education

Radiography Technology

FY2023 / 42 Credits (1600 Clock-Hours)

PROGRAM DESCRIPTION

In this program, students will be instructed in the classroom and laboratory settings to learn on-the-job skills of being an x-ray tech, and then apply that knowledge in a clinical setting. You will have the opportunity to gain experience in a variety of healthcare settings including -but not limited to- hospitals, urgent care, and family practice clinics. The experience you will gain at your clinical sites will put you on the path to a successful career as a Radiographic Technologist.

Objectives:

- Demonstrate x-ray procedures from skull down to the lower extremity
- Perform exceptional patient care
- Explain how the x-ray tube works, the physics behind it, and how x-rays are produced
- Perform 935 on the job training hours throughout the course of the program

COURSE DESCRIPTIONS

AHA Basic Life Support for Healthcare Providers

0 Credits/5 Clock-Hours

The Basic Life Support (BLS) Course for Health Care Providers is designed to provide professionals with the necessary skills to keep people alive until they can be brought to a hospital or be treated with more advanced lifesaving measures.

This course covers: adult and pediatric CPR, two-rescuer scenarios and use of the bag-valve masks, foreign-body airway obstruction, automated external defibrillation, special resuscitation situations, stroke and cardiac arrest, and other cardiopulmonary emergencies.

Objectives:

- Recognize several life-threatening emergencies
- Correctly perform CPR
- Correctly use an AED
- Relieve choking in a safe, timely and effective manner

Rad. Anatomy & Procedures

3 Credits/90 Clock-Hours

This course is designed to provide students with the knowledge and skills to take x-ray images of the chest, abdomen, upper limb, and shoulder. During this course students will practice taking x-rays, identifying anatomy and topical landmarks, and how to position the patient and the x-ray tube for each exam. Students will practice using post processing techniques when completing the entire process of start to finish when taking an x-ray.

Objectives:

- Demonstrate their anatomy and landmark knowledge of the chest, abdomen, upper limb, humerus, shoulder girdle
- Simulate the routine and special positions and projections for the chest, abdomen, upper limb, and shoulder procedures in both the lecture and lab settings
- Describe skeletal trauma and fracture terminology related to the chest, abdomen, upper limb, and shoulder girdle

Radiographic Imaging and Exposure Techniques

3 Credits/90 Clock-Hours

This course is designed to introduce and teach students about x-ray imaging and exposure techniques. In this course, students will understand how x-rays are produced, the components of an x-ray tube, what the core techniques are, and how they produce a visible image. Students will also learn the basics of digital imaging and how to use the post processing techniques properly.

Objectives:

- Describe the components of an x-ray tube, beam and how x-rays are produced
- Explain the properties and characteristics of x-rays
- Identify the different types of image receptors and explain their proper use
- Use the key features in the digital image process and in post processing

Patient Care**1 Credit/30 Clock-Hours**

This course is designed to provide students with the knowledge and skills that are necessary to perform exceptional care while working with patients in their clinical and job setting. Students will learn how to properly transfer patients, perform correct sterile techniques, communicate effectively, and use preventative measures for infectious diseases.

Objectives:

- List what the radiography technologist's role is and what standards they are expected to abide by
- Maintain a professional attitude toward various patient populations with an ability to meet their individual needs including those of diverse ethnicity, religion, disability, gender, age, and sexual orientation
- Use safety precautions and proper infection control procedures
- Assess the patient's needs and demonstrate proper transportation techniques to the patient if needed
- Describe sterile techniques that they will use during procedures in and out of surgery

Rad. Clinicals I**6 Credits/270 Clock-Hours**

This course is designed for students to take their knowledge of what they learned in the classroom and laboratory and apply it to their clinical sites. Students will position patients, use proper radiation protection techniques, and take x-rays under the supervision of the x-ray department staff. Students will learn the job of an X-ray technologist through real world experiences.

Objectives:

- Use proper radiation protection techniques during each x-ray exam
- Execute x-ray imaging exams from start to finish under the direction of the x-ray department staff
- Select technical factors to produce quality diagnostic images with the mindset of ALARA
- Pass off their X-ray Competencies for Chest, Abdomen, Upper Limb, and Shoulder Girdle

Radiology Physics**1 Credits/30 Clock-Hours**

This course is designed to teach students about the physics of x-ray production. Students will learn about the characteristics of an x-ray beam, how it is created, and how they travel. Students will learn the different ways that X-ray photons interact with matter and how it can affect atoms and cells. Students will also learn how electrical circuits work and the different types of circuits used in the x-ray process.

Objectives:

- Explain the difference between AC and DC circuits
- Identify and describe each part of the x-ray circuit and what it does
- Demonstrate the creation process of the x-ray beam and how it travels through the x-ray tube
- Describe the different ways that x-rays photons can interact with matter and the cause

Rad. Anatomy & Procedures II**3 Credits/90 Clock-Hours**

This course is designed to provide students with the knowledge and skills to take x-ray images of the lower extremities, spine, pelvis, and ribs along with practicing the exams from the semester before. During this course students will practice taking x-rays, identifying anatomy and topical landmarks, and how to position the patient and the x-ray tube for each exam. Students will practice using post processing techniques when completing the entire process of start to finish when taking an x-ray.

Objectives:

- Demonstrate their anatomy and landmark knowledge of the lower extremities, spine, pelvis, and ribs
- Describe skeletal trauma and fracture terminology related to the lower extremities, spine, pelvis, and ribs
- Explain the routine and special positions and projections for the lower extremities, spine, pelvis, and ribs procedures in the lab setting

Radiographic Imaging II**2 Credits/60 Clock-Hours**

This course is designed to build upon the student's knowledge of imaging and exposure and enhance their skills as a student tech. Students will build upon their knowledge of how x-rays are created and manipulated with certain exposure values. Students will gain a better understanding of exposure techniques, digital imaging processes, automatic exposure control, and other post processing techniques. Students will practice these techniques during labs and will enhance their imaging skills.

Objectives:

- Explain scatter radiation and the purpose of grids
- Describe the process of using AEC along with manual techniques and how it benefits their patient
- Demonstrate proficiency in the different imaging techniques and manipulation of techniques increase during time spent in the lab
- Use the specific formulas associated with image quality to make their images better

Rad Protection and Radiobiology**1 Credits/30 Clock-Hours**

This course is designed to teach students about radiation protection methods and the effects that can happen from radiation exposure. Students will learn about beam filtration, beam restrictors, and patient consideration. Students will learn about the ALARA principles and the importance of time, distance, and shielding. Students will learn about dosimeters and how they monitor radiation levels. Students will also learn about the biological effects of radiation and how they can affect the body.

Objectives:

- Explain the ALARA principle and its relationship to time, distance, and shielding
- Identify the biological effects that can happen due to radiation
- Explain the difference between short- and long-term somatic effects
- Describe the methods of filtration, beam restriction, and patient consideration
- Demonstrate proper radiation protection techniques

Rad. Clinicals II**6 Credits/270 Clock-Hours**

This course is designed for students to take their knowledge of what they have learned and are currently learning in the classroom and laboratory and apply it to their clinical sites. Students will position patients, use proper radiation protection techniques, and take x-rays under the supervision of the x-ray department

staff. Students will also participate in other imaging exams, like fluoroscopy, surgery c-arm exams, and dexta scans. Students will learn the job of an X-ray technologist through real world experiences.

Objectives:

- Use proper radiation protection techniques during each x-ray exam
- Execute x-ray imaging exams from start to finish under the direction of the x-ray department staff
- Select technical factors to produce quality diagnostic images with the mindset of ALARA
- Pass off their X-ray Competencies for lower extremities, spine, pelvis, and ribs

Rad. And Pediatric Pathology

1 Credits/30 Clock-Hours

This course is designed to teach students about the different pathology cases they may see during their clinicals. Students will learn how to help pediatric patients through their entire x-ray or imaging exam. Students will be able to identify different pathologies they will see on their imaging rotations.

Objectives:

- Describe techniques to help their pediatric patients through their exam
- Demonstrate their knowledge of different pathology cases
- Identify different pediatric and adult pathologies they may see in clinicals and what they learn in class

Rad. Anatomy & Procedures III

2 Credits/60 Clock-Hours

This course is designed to provide students with the knowledge and skills to take x-ray images of the upper and lower GI tract, urinary tract and biliary tract along with the skull, sinus, facial bones, and trauma x-ray views. During this course, students will practice taking x-rays, identifying anatomy and topical landmarks, and using the x-ray tube with correct post processing techniques.

Objectives:

- Demonstrate their anatomy and landmark knowledge of the upper and lower GI tract, urinary tract and biliary tract along with the Skull, Sinus, Facial Bones, and trauma x-ray views
- Explain the routine and special positions and projections for the Skull, Sinus, Facial Bones procedures in the lab setting
- Describe skeletal trauma and fracture terminology related to the Skull, Sinus, and Facial Bones

Alternate Modality and Sectional Anatomy

2 Credits/60 Clock-Hours

This course is designed to teach students about the different imaging modalities in the field of radiology and to give students a base understanding of cross section anatomy. Students will be taught by imaging professionals who have specialized in a certain modality. Students will be able to gain more information about what they want to do in the future. Students will also be able to identify different sections of cross-sectional anatomy.

Objectives:

- Explain the difference between each imaging modality
- Describe sectional anatomy terms
- Identify different cross sections of the body

Rad. Clinicals III

6 Credits/270 Clock-Hours

This course is designed for students to take their knowledge of what they have learned and are currently learning in the classroom and laboratory and apply it to their clinical sites. Students will position patients, use proper radiation protection techniques, and take x-rays under the supervision of the x-ray department

staff. Students will also participate in other imaging exams, like fluoroscopy, surgery c-arm exams, and dexta scans. Students will learn the job of an X-ray technologist through real world experiences.

Objectives:

- Use proper radiation protection techniques during each x-ray exam
- Execute x-ray imaging exams from start to finish under the direction of the x-ray department staff
- Select technical factors to produce quality diagnostic images with the mindset of ALARA
- Pass off their Imaging Competencies for upper and lower GI tract, urinary tract and biliary tract along with the skull, sinus, facial bones, and trauma x-ray views

Registry Review (online)**3 Credits/90 Clock-Hours**

This course is designed to assist students in studying for their ARRT national board exams that they will take at the end of the program. This course will provide students with the resources, help aids, and practice exams they need to study for their national boards.

Objectives:

- Demonstrate their knowledge of the program based on their practice board exams
- Describe the format of the ARRT board exam
- Explain the main principles of radiography technology
- Demonstrate their knowledge of patient protection, patient positioning, and patient care

Rad. Clinicals IV**2 Credits/125 Clock-Hours**

This course is designed for students to take their knowledge of what they have learned and are currently learning in the classroom and laboratory and apply it to their clinical sites. Students will position patients, use proper radiation protection techniques, and take x-rays under the supervision of the x-ray department staff. Students will also participate in other imaging exams, like fluoroscopy, surgery c-arm exams, and dexta scans. Students will learn the job of an X-ray technologist through real world experiences.

Objectives:

- Use proper radiation protection techniques during each x-ray exam
- Execute x-ray imaging exams from start to finish under the direction of the x-ray department staff
- Select technical factors to produce quality diagnostic images with the mindset of ALARA
- Pass off their Imaging Competencies for all exams they have learned throughout the program



Utah System of Higher Education
Sterile Processing Technician
FY2023 / 24 Credits (900 Clock-Hours)

Sterile Processing Technician			
Institutions: Mountainland			
<i>Certificate of Program Completion (Catalog Year: 2023, 24 Credits/900 Clock-Hours Required, CIP: 51.1012)</i>			
Core (25 Credits/900 Clock-Hours)		Credits	Credit Hours
CSTE 1010	Intro to Sterile Processing and Decontamination	3	100
CSTE 1110	Preparation & Packaging	3	90
CSTE 1210	Sterilization & Disinfection	4	120
CSTE 1310	Storage & Distribution, QA, and Equipment	3	90
CSTE 0450	Externship	11	500



Utah System of Higher Education

Sterile Processing Technician

FY2023 / 24 Credits (900 Clock-Hours)

PROGRAM DESCRIPTION

The beginning of a successful surgery begins with clean and sterile surgical instruments. As a Sterile Processing Technician, you will be an essential team member of the operating room and healthcare team. You will be responsible for the cleanliness, decontamination, inspecting and assembly of surgical instruments, packaging, and sterilization of all surgical instruments. As you pay close attention to details regarding instruments you will have to be an effective verbal and written communicator with the OR staff to make procedures a success. Sterile Processing Technicians have a strong understanding of decontamination and infection control to ensure their work protects patients and healthcare members from infections and diseases.

After completing this course, students will be prepared to take the Certified Registered Central Service Technician (CRCST) exam offered by the Healthcare Sterile Processing Association (HSPA). This program is based on the HSPA certification, CRCST.

Objectives:

- Identify the different instrumentation used in daily surgical procedures (scissors, forceps, clamps, retractors)
- Assemble surgical instrument trays and instruments designated for other departments (ED, Labor & Delivery, ICU, Cardiac Unit, Research)
- Demonstrate how to package single or paired instruments in paper/plastic pouches for sterilization. This packaging method is commonly known as the Peel Pack method
- Demonstrate the different processes of sterilization methods such as high-temperature and low
- Receive certification through the American Heart Association for Basic Life Support for the Healthcare Provider and First Aid
- Be able to apply safe practices regarding PPE, bloodborne pathogens, and distinguish between different levels of disinfection (High, Intermediate, Low)

COURSE DESCRIPTIONS

Intro to Sterile Processing and Decontamination

3 Credit/100 Clock-Hours

Sterile processing technicians play an important role to ensure patient safety, infection prevention, and providing clean, sterile instruments on a regular basis for surgical procedures. Numerous processes and lab activities will help enhance the understanding of surgical instruments going from dirty, to clean, to becoming sterile, also known as One-Way-Flow. Each area in sterile processing is a building block of achieving sterile instrumentation for surgeries.

The decontamination of surgical instruments is an integral part of a sterile technician's job. Review and practice of standard operating procedures for bloodborne pathogens, standard precautions, decontamination of surgical instruments from the OR, and decontaminated to an acceptable level. Introduction of OSHA approved PPE and how to don and doff PPE will be practiced in the lab, along with other hands-on activities to practice in the lab. These activities will help reinforce the step-by-step processes the students must understand and follow through with the current standards and guidelines for decontamination in sterile processing.

Objectives:

- Explain the importance of the Sterile Processing Department, with an emphasis on the service provided and role of CS in quality patient care
- Identify the various elements used in medical terminology including prefixes, roots, and suffixes

- Discuss how medical terminology can refer to the human anatomy, disease processes, surgical instruments, and surgical procedures to assist the OR when specific items are needed for surgeries
- Review the structure, function, activities, and role of cells, tissues, and organs in the body and identify common surgical procedures that involve each system
- Identify pathogenic microorganisms such as bacteria, viruses, fungi and parasites, and how to prevent the spread of each pathogenic microorganism
- Recognize the differences between federal and state laws/regulations versus voluntary standards and guidelines
- Identify the need and use for thermal disinfection for infection prevention, the hazards of bloodborne pathogens
- Describe Point-of-use preparation and safety guidelines for transporting contaminated items from the OR to the decontamination area
- Discuss the purpose and set up of the decontamination sink areas including the importance of OSHA approved PPE
- The role of detergents/enzymatic cleaners, three levels of disinfection, and the steps in the pre-cleaning process

Preparation & Packaging

3 Credit/90 Clock-Hours

Identification of surgical instruments, their function and each specialty they're used for (e.g., ortho, neuro, spine, etc.), testing methods used for specific instruments such as but not limited to laparoscopic sheath testing, scissor sharpness, tip protections and inspection for wear and tear of each instrument. Students will practice simultaneous wrapping methods, the most commonly used in the OR's, and learn to identify sterilizing methods for each instrument set. Recognize the difference and become familiar with chemical indicators, tamper-evident seals, rigid container system and list of contents with instructions on how to assemble the instrument sets for the OR.

Objectives:

- Explain the function, accurate, and neat, methodology for assembling instrument sets
- Recognize the areas of each instrument for inspection of debris and functionality
- Explain sterilization and the two most commonly used methods
- Identify the sterilization method and the use of chemical indicators, tamper-evident seals and packaging material for sterilization
- Understand and become familiar with count sheets or "recipes," a list of contents and details originated by the OR staff on how to assemble each instrument set
- Practice simultaneous wrapping, the most commonly used in the OR
- Demonstrate how to use "peel packs" to package single instruments when needed
- Label instrument sets for each packaging methods (rigid containers, wrapping, peel packs)
- Provide an overview of reusable and disposable packaging materials and packaging concepts including closure methods and selection factors

Sterilization & Disinfection

4 Credit/120 Clock-Hours

High temperature and low temperature sterilization methods are the two methods of sterilization used in sterile processing. Discussion of daily testing procedures for each sterilization method, performance monitoring such as physical, biological, and chemical. Knowledge of which endospore is used for each sterilization method is crucial in order to assure sterility of surgical instruments. Record keeping and monitoring of each sterilization cycle will be practiced in the lab, as well as loading a sterilizer cart correctly.

The difference between disinfectants and the disinfection process will be discussed in great detail. Knowledge of these differences will ensure the student can recognize the three levels of disinfection; high, intermediate and low. Use of high-level disinfectants require OSHA approved PPE, while intermediate and low require minimal level of PPE to work with them. Activities on how to read different types of disinfectants, their intended use, contact times and which pathogens, if any, do they advertise to kill within the required contact time. The Chain of Infection will also be discussed in class and students will become familiar with each link and how to break in the infection process.

Objectives:

- Define the term Immediate Use Steam Sterilization and review the industry standards and procedures for use
- Describe point-of-use processing and heat-sensitive medical devices
- Discuss the advantage of steam sterilization, types and anatomy of different steam sterilizers, the sterilization cycles, conditions necessary for an effective process, and the indicators
- Recognize daily testing procedures for each sterilization method
- Understand how to document and read performance monitors for each sterilization method
- Explain the requirements and parameters of the low-temperature sterilization methods
- Understand the three levels of disinfectants and what they're used for
- Practice reading various types of disinfectants to learn how to read the instructions for use correctly
- Practice wearing PPE for lab activities which will require working with disinfectants
- Discuss the Chain of Infection and how it relates to everyday life
- Identify and break each link in the Chain of Infection

Storage & Distribution, QA, and Equipment

3 Credit/90 Clock-Hours

Sterile storage is where the instruments are stored after the sterilization process has been completed. Items will be picked for scheduled surgical procedures and be used in the OR on a patient. Items in sterile storage must have gone through the decontamination process, assembly and packaging process, and then the sterilization process.

Distribution refers to the process of distributing sterile single use or reusable items to the OR and other areas within the hospital or facility. Sterile single use or sterile reusable items can be stored in the Sterile Storage area and picked by sterile processing personnel as the OR and/or other departments have requested. Par levels and other required processes of sterile item replenishment will be discussed in class.

Quality Assurance is the daily testing of each sterilization method, high level disinfection process, decontamination and thermal disinfection process. Daily tests are performed and results are recorded for quality assurance and auditing purposes. Learning the record keeping processes, especially with daily testing of each sterilization method, will be practiced in the lab alongside the sterilization lab activities.

Various items of equipment are used with the OR and throughout the hospital or facility. Equipment items can include: morphine drips, epidural pumps, feeding pumps, other pain management devices, etc. These equipment items are usually picked up by the sterile processing departments and disinfected using low level disinfectants. Not every hospital or facility will require sterile processing staff to complete these tasks; Distribution technicians will assume the duties in such cases and perform the necessary disinfection procedures.

Objectives:

- Discuss sterile storage and transport considerations, concerns, and guidelines

- Explain the importance of monitoring work areas and processes and recordkeeping for quality control
- Describe common quality assurance programs and procedures in the Sterile Processing department
- Explain the basics of failure mode and effects analysis and root cause analysis
- Identify the importance of inventory management and the role of Sterile Processing technicians
- Describe common inventory replenishment systems and the cycle of consumable items
- Provide an overview of the use of information management systems in Central Service Departments including features of instrument and equipment tracking systems
- Explain the importance of safety and risk management in the Central Service department including education and reporting procedures
- Review three common workplace hazards: fire, hazardous substances, and bloodborne pathogens

Externship

11 Credits/500 Clock-Hours

Externship is arranged by the program coordinator with participating hospitals and facilities to accommodate students to work in the sterile processing departments. Students will be able to put their skills learned in the classroom and lab to use in the field. The externship may be paid if the student gains employment, as well as unpaid, if the student chooses to work in the hospital or facility on a volunteer only basis. Students will submit the hours worked and in what area (decontamination, assembly, sterilization, sterile storage, QA) to their instructor for verification of proper externship work and hours. Once the student reaches 400 externship hours, they're eligible to sit for the HSPA CRCST exam. When the student has completed 450 hours, they will have completed the program in its entirety.

Objectives:

- Apply the knowledge learned in the classroom to real world situations
- Demonstrate the hands-on skills mastered in the lab to the Sterile Processing departments in hospitals or facilities (Ambulatory Surgery Centers, Dental Clinics, Plastic Surgery Centers)



Utah System of Higher Education
Nursing Assistant
FY2023 / 3 Credits (114 Clock-Hours)

Nursing Assistant			
Institutions: Bridgerland, Davis, Dixie, Mountainland, Ogden-Weber, Salt Lake, Snow, Southwest, Tooele, Uintah Basin, USU-Eastern			
<i>Certificate of Program Completion (Catalog Year: 2023, 3 Credits/114 Clock-Hours Required, CIP: 51.3902)</i>			
Core (3 Credits/114 Clock-Hours)		Credits	Clock-Hours
PREF XXXX	Nursing Assistant	3	114



Utah System of Higher Education

Nursing Assistant

FY2023 / 3 Credits (114 Clock-Hours)

PROGRAM DESCRIPTION

The Nursing Assistant program is designed for students to receive their certification by completing coursework in classroom and clinical settings.

Objectives:

- Explain activities of daily living and nursing assistant scope of practice
- Demonstrate correct recognizing and reporting, communication, infection control, safety, and residents' rights in the care setting
- Demonstrate proficiency in all skills required for state certification
- Perform nursing assistant skills in a healthcare setting

COURSE DESCRIPTIONS

Nursing Assistant

3 Credits/114 Clock-Hours

The Nursing Assistant course introduces students to basic nursing skills in a classroom and laboratory setting. This course includes 24 hours of clinical experience.

Objectives:

- Explain activities of daily living and nursing assistant scope of practice
- Describe how critical criteria such as recognizing and reporting, communication, infection control, safety, and residents' rights are applied in the care setting
- Demonstrate proficiency in all skills required for state certification
- Perform nursing assistant skills in a healthcare setting



Utah System of Higher Education
 Medical Scribe
 FY2023 / 15 Credits (480 Clock-Hours)

Medical Scribe			
Institutions: Ogden-Weber			
<i>Certificate of Program Completion (Catalog Year: 2023, 15 Credits/480 Clock-Hours Required, CIP: 51.0707)</i>			
Core (15 Credits/480 Clock-Hours)		Credits	Clock-Hours
MEDS 0805	Beginning Medical Scribe	2	60
HLTH 1000	Medical Terminology	2	60
HLTH 1010	Anatomy and Physiology	3	90
MEDS 0810	Keyboarding for Medical Scribes	1	30
MEDS 0825	Health Insurance & Billing Basics	1	30
MEDS 0835	Medical Scribe Clinical Applications	3	90
MEDS 0845	Job Seeking Skills for Medical Scribes	1	30
MEDS 0870	Medical Scribe Externships	2	90



Utah System of Higher Education

Medical Scribe

FY2023 / 15 Credits (480 Clock-Hours)

PROGRAM DESCRIPTION

The Medical Scribe program prepares students to work as a medical scribe specialist. Students learn to use electronic health records (EHR) in order to document medical data obtained during patient visits. Students are required to synthesize and organize this data into a coherent entry so that it complies with federal regulations and insurance requirements. Students gain basic knowledge of medical terminology, anatomy and physiology; fundamental understanding of insurance billing and coding and entry-level knowledge of medical law.

Objectives:

The Medical Scribe program prepares students to perform specific entry-level skills and verify knowledge required for the occupation, to include the following:

- Medical terminology, anatomy, physiology, and medical law knowledge
- Basic knowledge of EHRs including data entry, formatting of information obtained during the physical examination and prescribed treatments
- Typing proficiency of at least 60 words per minute
- Fundamental understanding of the documentation required by insurance billing and coding entities
- Basic telephone etiquette and triage
- Ability to work competently and in a timely manner to complete assigned work.

COURSE DESCRIPTIONS

Beginning Medical Scribe

2 Credits/60 Clock-Hours

This course is an introduction to the duties and responsibilities of the medical scribe in the primary care and emergency department environments. The course provides an overview of the daily duties performed by medical scribes and covers basic pharmacology, medicolegal considerations regarding patient privacy and the elements that comprise the medical note.

Objectives:

- Describe the general roles and responsibilities of the medical scribe
- List duties which are prohibited to be performed by medical scribes
- Describe the classification and recommended uses of common medications used in the primary care and emergency room setting
- Define the elements that comprise the medical note
- Give examples of the common reasons for visits in the family practice/primary care clinic
- Give examples of the common reasons for visits to the emergency department
- Describe protected health information (PHI) as stated in the HIPAA Privacy Rule
- List common day-to-day security practices performed by clinic personnel to prevent unlawful disclosures of PHI.
- Compare and contrast the differences between the EMR and EHR systems used health care facilities

Medical Terminology

2 Credit/60 Clock-Hours

This course will provide instruction on how to interpret and understand medical language as well as the basic structure of medical words. Additionally, this course will explore interpretations of medical abbreviations for those seeking a career in medicine.

Objectives:

- Identify the role of the four main types of word parts that make up medical terms.



Utah System of Higher Education

Medical Scribe

FY2023 / 15 Credits (480 Clock-Hours)

- Define word parts
- Define medical words.
- Describe steps to locate medical words using either a medical dictionary or an online resource.
- Write the singular, plural and adjective forms of medical words.
- Recognize the importance of spelling medical terms correctly.

Anatomy and Physiology

3 Credits/90 Clock-Hours

This course will explore the basic structure and function of the human body, as well as common disease processes and treatments.

Objectives:

- Describe the structural organization of the human body
- List the body systems
- Describe body planes, directional terms, quadrants and cavities
- List the major organs that comprise each body system
- Identify the anatomical location of major organs in each body system
- Compare the structure and function of the human body across the life span
- Describe the normal function of each body system
- Identify common pathology related to each body system

Keyboarding for Medical Scribes

1 Credits/30 Clock-Hours

This is a computer-based, self-paced course designed to develop typing speed and accuracy to a minimum proficiency of 60 wpm.

Objectives:

- Demonstrate a minimum typing speed of 60 words per minute on the course exit evaluation
- Demonstrate a typing accuracy that does not exceed the number of errors allowed in each exercise and the course exit evaluation.
- State the ergonomic elements that can reduce typing-related injuries

Health Insurance & Billing Basics

1 Credits/30 Clock-Hours

This course provides an introduction to medical insurance coding, billing, and claim processing procedures and how it relates to the documentation in the patient's health record. Provides instruction and practice of medical office financial procedures.

Objectives:

- Describe how documentation in the electronic health record (EHR) affects the billing and coding process
- Define evaluation and management (E/M) levels and their purpose in the claims and billing process
- Define Current Procedural Terminology (CPT) and its purpose in the billing process
- Define the Quality Payment Program
- List the 10 steps of the billing process

Medical Scribe Clinical Applications

3 Credits/90 Clock-Hours

This course provides practice in synthesizing a complete and accurate medical note from the interaction observed between the provider and the patient. Emphasis will be placed on using correct terminology, abbreviations, spelling, and format. Instruction will also include accessing, navigating, and entering information into the electronic health record.

Objectives:



Utah System of Higher Education

Medical Scribe

FY2023 / 15 Credits (480 Clock-Hours)

- Document the patient/provider encounter into the electronic patient record.
- Make corrections as necessary to the health record that meet legal requirements.
- Describe the elements that comprise a complete medical note.
- Anticipate and retrieve relevant documents related to the patient's condition the provider might need.
- Identify the elements necessary for E/M determination by coding and billing staff.
- Navigate the EHR/EMR before, during and after the patient encounter.

Job Seeking Skills for Medical Scribes

1 Credits/30 Clock-Hours

This course provides experience in developing job-seeking skills necessary to find gainful employment.

Objectives:

- Complete a resume
- Complete a reference sheet
- Complete a cover letter
- Respond to common job interview questions
- Compile a list of questions to ask in job interviews
- Write a thank-you letter after an interview
- Participate in a practice job interview

Medical Scribe Externships

2 Credits/90 Clock-Hours

This course gives students practical clinical experience working as a medical scribe in an operational medical facility. Medical scribe students will work under the direction of a clinical supervisor and are expected to apply the knowledge and skills learned in the classroom to a clinical setting. Additionally, this course provides students with experience in developing job-seeking skills necessary to find gainful employment.

Objectives:

- Perform skills of the medical scribe under the direction of a clinical supervisor.



Utah System of Higher Education
 Plumbing Apprenticeship
 FY2023 / 24 Credits (720 Clock-Hours)

Plumbing Apprenticeship			
Institutions: Bridgerland, Davis, Dixie, Mountainland, Ogden-Weber, Salt Lake, Southwest			
<i>Certificate of Program Completion (Catalog Year: 2023, 24 Credits/720 Clock-Hours Required, CIP:46.0503)</i>			
Core (32 Credits/1140 Clock-Hours)		Credits	Clock-Hours
PREF XXXX	Plumbing IA	3	90
PREF XXXX	Plumbing IB	3	90
PREF XXXX	Plumbing IIA	3	90
PREF XXXX	Plumbing IIB	3	90
PREF XXXX	Plumbing IIIA	3	90
PREF XXXX	Plumbing IIIB	3	90
PREF XXXX	Plumbing IVA	3	90
PREF XXXX	Plumbing IVB	3	90



Utah System of Higher Education

Plumbing Apprenticeship

FY2023 / 24 Credits (720 Clock-Hours)

PROGRAM DESCRIPTION

The Plumbing Apprenticeship program satisfies the educational requirements to take the State Journeyman Plumber Exam. To complete the entire Apprentice Plumbing Program, an individual must be licensed through the State and work under the supervision of a licensed Journeyman Plumber. A basic assessment is required prior to enrolling. This program provides a solid understanding of the International Plumbing Code (IPC), its layout, and the requirements for different plumbing systems and parts of those systems. This program discusses the processes, parts, and risks involved with the various plumbing systems as well as the safety equipment and measures that are in place to protect plumbers and the public alike.

Objectives:

- Determine the application of the International Plumbing Code (IPC)
- Demonstrate how to navigate the International Plumbing Code (IPC)
- Calculate sizing of various piping, including natural gas, supply, and waste lines
- Demonstrate the application of the International Fuel Gas Code
- Demonstrate the application of the International Mechanical Code
- Demonstrate practical application of plumbing mathematics
- Apply critical and practical thinking skills necessary to pass the State Journeyman's Test

COURSE DESCRIPTIONS

Plumbing IA

3 Credits / 90 Clock-Hours

The Plumbing IA course explores the secure and highly demanded profession of plumbing. The primary emphases include: the understanding and interpretation of the International Plumbing Code (IPC), blueprint reading, materials and requirements, practical mathematics required in plumbing, and other subject areas that are essential to the trade which are more conducive to the classroom setting than a work environment.

Objectives:

- Certify in First Aid Cardiopulmonary Resuscitation (CPR) and Automated External Defibrillator (AED)
- Practice safety and the proper use of tools and leveling instruments
- Define hydraulics and pneumatics
- Interpret building and plumbing codes
- Apply basic mathematics toward measurements, angles, slopes, and other plumbing related problems
- Fabricate plumbing projects in a lab setting

Plumbing IB

3 Credits / 90 Clock-Hours

The Plumbing IB course introduces the fundamentals of plumbing theory for the apprentice plumbers and will cover the International Plumbing Code, related math, and craft skills.

Objectives:

- Identify fixtures, faucets and fixture fittings, water heaters, traps, interceptors and separators
- Develop basic skills needed to read drawings and produce piping sketches
- Apply mathematics related to plumbing and angles
- Implement the process of making watertight joints using heat and various filler metals

- Define machine and hand excavating with emphasis on safety
- Explain various types of pipe and fittings used in residential and light commercial plumbing systems
- Fabricate several piping projects in a lab situation

Plumbing IIA

3 Credits / 90 Clock-Hours

The Plumbing IIA course introduces the fundamentals of plumbing theory for the apprentice plumbers and covers the International Plumbing Code (IPC), related math, and craft skills.

Objectives:

- Describe water supply and distribution, sanitary drainage, indirect/special waste, vents, traps, interceptors and separators, along with other basic fundamental plumbing components
- Identify the many different fixtures designed for residential and small commercial buildings
- Apply correct principles for designing Drainage, Waste, and Vent (DWV) and water supply systems that will provide long and satisfactory service
- Describe how to determine the size of water supply piping
- Define how to support and test both DWV and water supply systems
- Explain R317-4 onsite wastewater systems
- Fabricate several piping projects in a lab situation

Plumbing IIB

3 Credits / 90 Clock-Hours

The Plumbing IIB course continues to explore the fundamentals of plumbing theory for the apprentice plumbers and covers the International Plumbing Code (IPC), related math, and craft skills.

Objectives:

- Explain storm drainage and special piping and storage systems
- Calculate grade, percent grade, drop and run, and offsets
- Cite proper construction and operation of private waste-disposal systems
- Identify the basic components, design considerations, and installation techniques of swimming pools, hot tubs, and spas
- Describe the components and materials used in lawn and garden irrigation systems
- Troubleshoot, recognize, and repair problems associated with plumbing systems
- Fabricate several piping projects in a lab situation

Plumbing IIIA

3 Credits / 90 Clock-Hours

The Plumbing IIIA course continues to explore the fundamentals of plumbing theory for the apprentice plumbers and covers the International Plumbing Code (IPC), International Fuel Gas Code (IFGC) and International Mechanical Code (IMC), along with related math and craft skills.

Objectives:

- Identify materials detrimental to sewer systems
- Determine protection of pipes and plumbing system components
- Explain washroom and toilet room requirements
- Describe specialty plumbing fixtures
- Determine proper water heater, vents, and combustion air installation requirements as per the International Mechanical Code (IMC) and the International Fuel Gas Code (IFGC)
- Calculate combustion air, chimneys, and vent sizes
- Determine volume of Rectangular Solids, Cylinders

- Identify NPFA 13D residential fire sprinklers
- Fabricate several piping projects in a lab situation

Plumbing IIIB

3 Credits / 90 Clock-Hours

The Plumbing IIIB course introduces the fundamental Plumbing theory for the Apprentice Plumbers and covers the International Plumbing Code (IPC), International Fuel Gas Code and International Mechanical Code, along with related math and craft skills.

Objectives:

- Calculate size of fuel piping and fuel-gas piping
- Describe vents and commercial/industrial application
- Describe indirect/special waste and commercial/industrial application
- Calculate size of water supply and distribution review and commercial/industrial applications.
- Identify special piping and storage systems
- Explain Utah Amendments and R617-4
- Fabricate several piping projects in a lab situation
- Calculate sizing of various water and drain piping systems

Plumbing IVA

3 Credits / 90 Clock-Hours

The Plumbing IVA course reviews the International Plumbing Code (IPC), International Fuel Gas Code and International Mechanical Code, math, and other laws in preparation for taking the journeyman state test.

Objectives:

- Define all chapters of the International Plumbing Code
- Apply mathematics related to plumbing, angles, rolling offsets and pipe lengths
- Explain storm drainage and commercial/industrial application for sizing roof drains
- Explain International Mechanical Code for general, combustion air, boilers, and hydronics
- Discuss Utah Amendments to the Code
- Identify National Fire Protection Association (NFPA) 13D residential fire sprinklers
- Explain R317-4 onsite wastewater
- Fabricate several piping projects in a lab situation

Plumbing IVB

3 Credits / 90 Clock-Hours

The Plumbing IVB course assists the apprentices in passing the state test and provides a foundation for success as a journeyman plumber. A variety of modules are available for the student to work from, with a focus on what each individual student needs in order to prepare for the test.

Objectives:

- Review International Plumbing Code (IPC) chapters
- Apply mathematics for plumbers and pipefitters
- Use International Fuel Gas Code for gas pipe installation and sizing
- Define traps and commercial applications
- Explain storm drainage and commercial/industrial applications
- Identify boilers, water heaters, and pressure vessels
- Perform applied trade formulas using different equations
- Calculate heat loss vs. radiator size
- Determine radiation sizing for total heat loss of a room

- Use Journeyman skills such as takeoff lists, leadership skills, communication, and basic business skills
- Fabricate several piping projects in a lab situation



Utah System of Higher Education
 Real Estate
 FY2023 / 4 Credits (120 Clock-Hours)

Real Estate			
Institutions: Bridgerland, Ogden-Weber			
<i>Certificate of Program Completion (Catalog Year: 2023, 4 Credits/120 Clock-Hours Required, CIP: 52.1501)</i>			
Core (4 Credits/120 Clock-Hours)		Credits	Clock-Hours
PREF XXXX	Pre-licensing	4	120
Non-Required Electives (0 Credits/0 Clock-Hours)			
Ogden-Weber Technical College			
PREF XXXX	Broker License	4	120



Utah System of Higher Education

Real Estate

FY2023 / 4 Credits (120 Clock-Hours)

PROGRAM DESCRIPTION

The Real Estate program is state approved and designed to prepare students to pass the licensing exams and earn a real estate license in the State of Utah. Utah law requires that students complete a 120-hour educational course before they take the Utah real estate licensing exam. Our Pre-Licensing course includes instruction and review tests to prepare students to take the Utah real estate sales agent exam.

Objectives:

- Define and describe real property, land, and real estate
- Distinguish between real and personal property
- Compute basic math skills including profit & loss, simple interest, proration, commissions, etc.
- Identify the approved forms and addenda a licensee may fill out and the circumstances under which each should be used.
- Define closing as it relates to a real estate transaction
- Differentiate between debits and credits
- Explain how it is determined where debits and credits go on the settlement statement.
- Explain the term “agency” and the different agency types
- Use the proper forms of agency including the relationship between agent, subagent, client, and customer.
- Compare and contrast the various types of ownership, and indicate situations when each would be appropriate or required.

COURSE DESCRIPTIONS

Pre-licensing

4 Credits/120 Clock-Hours

The Real Estate course is state approved and designed to prepare students to pass the licensing exams and earn a real estate license in the State of Utah. Utah law requires that students complete a 120-hour educational course before they take the Utah real estate licensing exam. Our Pre-Licensing course includes instruction and review tests to prepare you to take the Utah real estate sales agent exam.

Objectives:

- Define and describe real property, land and real estate
- Distinguish between real and personal property
- Compute basic math skills including profit & loss, simple interest, proration, commissions, etc.
- Identify the approved forms and addenda a licensee may fill out and the circumstances under which each should be used
- Define closing as it relates to a real estate transaction
- Differentiate between debits and credits
- Explain how it is determined where debits and credits go on the settlement statement
- Explain the term “agency” and different agency types
- Use of the proper forms of agency including the relationship between agent, subagent, client and customer
- Compare and contrast the various types of ownership, and indicate situations when each would be appropriate or required

NON-REQUIRED ELECTIVES

Broker License**4 Credits/120 Clock-Hours**

The Broker License course satisfies the requirements to become a licensed State of Utah Broker. This course explores various modules designed to prepare for the State of Utah Broker licensing exam. This course focuses on the statutory licensing qualifications of honesty, integrity, truthfulness, reputation and competency. Students must have three years full-time, licensed, active real estate experience; or two years full-time, licensed, active, real estate experience and one-year full-time professional real estate experience, as well as accumulated a total of at least 60 documented experience points that comply with State of Utah requirements within the past five years preceding the date of enrollment into this course.

Objectives:

- Complete 30 hours of Utah Law including 3 hours testing
- Complete 45 hours of Broker Principles including 4 hours of testing
- Complete 45 hours of Broker Practices including 4 hours testing
- Define and describe real property, land and real estate, and distinguish between real and personal property
- Compute basic math skills including profit & loss, simple interest, proration, commissions, etc.
- Identify the approved forms and addenda a licensee may fill out and the circumstances under which each should be used
- Define closing as it relates to a real estate transaction
- Differentiate between debits and credits
- Explain how it is determined where debits and credits go on the settlement statement.
- Explain the term “agency” and the different agency types
- Use of the proper forms of agency including the relationship between agent, subagent, and client and customer
- Compare and contrast the various types of ownership, and indicate situations when each would be appropriate or required



Utah System of Higher Education
Clinical Lab Assistant
FY2023 / 9 Credits (365 Clock-Hours)

Clinical Lab Assistant			
Institutions: Salt Lake			
<i>Certificate of Program Completion (Catalog Year: 2023, 9 Credits/365 Clock-Hours Required, CIP: 51.0802)</i>			
Core (9 Credits/365 Clock-Hours)		Credits	Clock-Hours
KAOS 0170	Computer Concepts	1	30
KMOA 0111	Medical Terminology	2	70
KCLA 0010	Intro to Healthcare	1	50
KCLA 0020	Admin Healthcare Procedures	1	45
KCLA 0030	Basic Healthcare Procedures	1	50
KCLA 0040	Clinical Lab Procedures I	3	105
KWRK 0515	Job Seeking Skills	0	15
Non-Required Electives (0 Credits/0 Clock-Hours Required)			
KCLA 0050	Clinical Lab Externship	1	64



Utah System of Higher Education

Clinical Lab Assistant

FY2023 / 9 Credits (365 Clock-Hours)

PROGRAM DESCRIPTION

The Clinical Lab Assistant Program, a Competency Based Education training program, will provide students with the necessary knowledge and skills to competently perform the duties of a medical laboratory assistant. Clinical Lab Assistants are trained to work in doctors' offices, hospital laboratories and other outpatient labs as an integral member of the allied health care delivery team.

The curriculum will allow the students to gain competency in cognitive, psychomotor and affective competencies. The program will be offered in a flexible open entry / open exit format.

Instruction will be achieved with a combination of online, classroom, laboratory, and clinical activities

Upon successful completion of the coursework at a satisfactory rate of 80% or better and receipt of all necessary documentation the student will receive the Certificate of Achievement.

Objectives:

- Demonstrate ability to use a computer and utilize computer programs to complete basic tasks
- Demonstrate ability to manage files and folder
- Define and use medical terminology, basic word structure, and body organization
- Define and use medical terminology suffixes and prefixes
- Define and use medical terminology for medical specialties and body systems
- Define the history of medicine, the role of the clinical lab assistant, medical specialties, credentialing and personal attributes of health care personnel
- Define and use legal and ethical standards in health care
- Demonstrate principles of HIPAA regulations
- Demonstrate knowledge of patient communication and cultural diversity in health care
- Demonstrate reception, general office duties, appointment scheduling and written communication in a health care setting
- Create patient records and demonstrate correct filing
- Perform appointment scheduling, patient registration and medical record maintenance electronically
- Apply CDC and OSHA guidelines for personal safety and asepsis while performing aseptic and sterilization techniques and procedures
- Obtain accurate vital signs using correct procedures
- Demonstrate first aid techniques and Healthcare Provider level CPR as defined by the American Heart Association
- Define anatomy of venous structures and successfully perform technically correct and safe venipuncture using vacutainer, butterfly and syringe techniques and correctly process the specimen
- Define and demonstrate basic concepts of clinical lab procedures, safety and proper use of the microscope
- Define and demonstrate CLIA waived testing in hematology and serology
- Define and demonstrate laboratory testing in microbiology and urinalysis
- Find job leads and connections
- Create resume and cover letter
- Complete job application and follow-up
- Perform well in a job interview

COURSE DESCRIPTIONS

Computer Concepts

1 Credit/30 Clock-Hours

In this course, you will learn about basic computer concepts that will help you succeed in your program of study. This course is the foundation course for all programs. The skills you learn in this course will be used through all your courses you take. As you progress through this course, you will be completing a series of activities that will build your computer knowledge and skills. Your knowledge and skills will add up to become a competency.

Objectives:

- Use the basic features of a learning management system to complete course work
 - Demonstrate how to successfully login and log off of Canvas
 - Demonstrate how to find a course
 - Show how to navigate through a course
 - Demonstrate how to submit assignments
 - Complete assessments
 - Demonstrate how to check grades
- Explain the parts of a computer and functionality of the hardware components.
 - Describe the purpose of the basic hardware parts of a computer
 - Describe the functionality of computer components
- Demonstrate a basic ability to use a computer running either a Windows or Apple operating system
 - Demonstrate how to turn on the computer and login to the computer
 - Use basic desktop elements to complete tasks
 - Demonstrate file management skills
 - Demonstrate how to log off and shut down the computer
- Use Microsoft Word to generate documents
 - Start Microsoft Word and choose a blank document
 - Create and format a document using the tools on the Ribbon
 - Save a document using the Backstage view
- Use a search engine to find information on the Internet
 - Differentiate between a search engine and browser
 - Identify relevant keywords to perform an Internet search
 - Use Internet search criteria to build web search queries
 - Determine if the website is a credible source
 - Explain malware and the kinds of damage it can cause to a computer

Medical Terminology

2 Credits/70 Clock-Hours

This course will introduce you to the skills necessary to interpret and understand medical terminology, in order to be successful in the pursuit of health occupation careers. This is accomplished by utilizing a method of study that not only instructs the students in building medical terms but also gives the student immediate application in utilizing the medical term. By knowing this you will recognize and understand this new language that will be essential as you begin a career in the healthcare environment!

Objectives:

- Define and use medical terminology basic word structure and body organization
- Define and use medical terminology suffixes and prefixes
- Define and use medical terminology for medical specialties and body systems

Intro to Healthcare**1 Credit/50 Clock-Hours**

In this course, you will get an overview of the various healthcare professions and roles in the healthcare environment, introduction to the legal and ethical issues within the healthcare setting, professional behavior, basic principles of communication and the impact of ethnic cultures in healthcare.

Objectives:

- Describe foundational information related to the medical field
- Explain the reasons professionalism and work ethics are important in the medical field
- Apply ethical standards in healthcare
- Apply legal expectations in healthcare
- Demonstrate the principles of HIPAA regulations by completing the HIPAA certification
- Demonstrate communication skills within a healthcare setting

Admin Healthcare Procedures**1 Credit/45 Clock-Hours**

Provides training in proficient medical office communication, front office administrative skills, and the fundamentals of beginning and tracking a patient record using both paper and electronic medical record (EMR) software.

Objectives:

- Demonstrate written communication in a healthcare setting
- Apply proper telephone techniques in a healthcare setting
- Apply proper patient reception and appointment scheduling techniques in a healthcare setting
- Apply daily operations in a healthcare setting
- Demonstrate how to properly create and maintain electronic medical records
- Apply meaningful use strategies to meet quality improvement outcome initiatives

Basic Healthcare Procedures**1 Credit/50 Clock-Hours**

Provides guidelines to learn about and apply standards of CDC and OSHA in regard to personal safety, asepsis, standard precautions and handling of biohazard wastes. Provides fundamental understanding and skills to obtain vital signs, basic first aid and healthcare provider level CPR.

Objectives:

- Explain the transmission of disease
- Differentiate aspects of medical asepsis and sterilization
- Perform aseptic techniques and sterilization procedures
- Apply CDC and OSHA guidelines for personal safety
- Obtain accurate vital signs using correct procedures
- Demonstrate first aid techniques
- Demonstrate Healthcare Provider level CPR as defined by the American Heart Association

Clinical Lab Procedures I**3 Credits/105 Clock-Hours**

Provides understanding of phlebotomy theory and skill performance; and of basic concepts, safety and procedures of the clinical lab. Learn proper handling and performance of CLIA waived hematology/serology labs and proper specimen handling and performance of microbiology and urinalysis testing.

Objectives:

- Differentiate the anatomy of venous structures essential in phlebotomy
- Recognize legal aspects of phlebotomy

- Distinguish equipment and supplies used to obtain blood samples
- Successfully perform technically correct and safe venipuncture using vacutainer butterfly, and syringe techniques
- Process laboratory specimens using proper techniques
- Utilize basic concepts of clinical lab procedures
- Practice clinical laboratory safety procedures
- Demonstrate proper use of laboratory equipment
- Discuss CLIA waived testing in hematology and serology
- Demonstrate CLIA waived testing in hematology and serology
- Discuss laboratory testing in microbiology
- Demonstrate laboratory testing in microbiology
- Discuss laboratory testing of urine samples
- Demonstrate laboratory testing of urine samples

Job Seeking Skills

0 Credits/15 Clock-Hours

This course will prepare you to succeed, as we explore a variety of tools and strategies, to make your transition to employment as smooth as possible. Proper preparation is often as important as the skills you have already acquired. The process of obtaining employment is often discouraging and grueling. The Job Seeking Skills course will cover many aspects of job searching, including; summarizing your skills, searching for job leads in unconventional ways, filling out applications, writing a resume and cover letter, interview etiquette, and lastly, a follow up letter.

Objectives:

- The student will be able to identify and explain personal employment direction and qualifications.
- The student will be able to complete the job application process.
- The student will be able to search for employment in their area of study and explain how social media will impact a job search.
- The student will be able to successfully complete a 20-minute mock interview.

Non-Required Electives (0 Credits/0 Clock-Hours Required)

Clinical Lab Externship

1 Credit/64 Clock-Hours

This stand-alone course is not a required part of the Clinical Lab Assistant program but can provide an opportunity for students that have completed that program to demonstrate and practice their laboratory skills learned in the classroom in a clinical setting with the oversight of the clinical supervisor. This allows the student to obtain real-world laboratory experience that will enhance their knowledge and skills, and allow them to obtain the required laboratory hours needed for a national certification exam for this vocation. This is an unpaid practicum experience that is an extension of your classroom training and will include tuition to SLCC SAT.

Objectives:

- Apply knowledge related to Clinical Laboratory procedures, processes, and environment
- Perform Clinical Laboratory procedures safely and accurately
- Demonstrate professional behaviors in the healthcare setting



Utah System of Higher Education
 Medical Office Administration
 FY2023 / 21 Credits (795 Clock-Hours)

Medical Office Administration			
Institutions: Salt Lake			
<i>Certificate of Program Completion (Catalog Year: 2023, 21 Credits/795 Clock-Hours Required, CIP: 51.0705)</i>			
Core (21 Credits/795 Clock-Hours)		Credits	Clock-Hours
KAOS 0170	Computer Concepts	1	30
KAOS 0500	Word Basics	1	40
KAOS 0400	Business Writing	2	70
KAOS 0600	Spreadsheets I	1	40
KMOA 0111	Medical Terminology	2	70
KMOA 0145	Anatomy & Physiology	1	50
KMOA 0120	Medical Law & Ethics	2	60
KMOA 0130	Psychology for Healthcare	1	30
KMOA 0155	Medical Office Procedures I	2	60
KMOA 0170	Medical Office Procedures II	2	60
KMOA 0180	Medical Office Procedures III	2	60
KMOA 0101	First Aid/CPR	0	10
KAOS 0300	Customer Relations	1	40
KWRK 0515	Job Seeking Skills	0	15
KMOA 0211	Med Office Externship	3	160
TOTALS		21	795



Utah System of Higher Education

Medical Office Administration

FY2023 / 21 Credits (795 Clock-Hours)

PROGRAM DESCRIPTION

The Medical Office Administration Program, a Competency Based Education training program, will provide students with the necessary knowledge and skills to competently perform the duties of administrative medical office staff as defined by local and national standards. Medical Office Administration employees are trained primarily to work in doctors' offices and other ambulatory care clinics as an integral member of the allied health care delivery team helping with administrative tasks including business functions, medical records, patient intake, billing and insurance and other front office tasks.

The Medical Office Administration program will be offered in a flexible open entry / open exit format. They will be trained in administrative areas of medical office along with CPR and First Aid, anatomy, physiology and medical terminology. The curriculum will allow the students to gain competency in cognitive, psychomotor and affective competencies.

Instruction will be achieved with a combination of online, classroom and clinical activities that will include experience in a healthcare facility. Students must demonstrate proficiency by passing all courses and competencies required in the program before being placed in a clinical site for the externship. Students complete a 160-hour unpaid clinical externship at a health care facility contracted with the college. Students are required to provide the externship coordinator of the Applied Technology division of the School of Applied Technology and Professional Development, evidence of completion of these hours and satisfactory performance signed by the clinical administrative supervisor.

Upon successful completion of the coursework and externship at a satisfactory rate of 80% or better and receipt of all necessary documentation the student will receive the Certificate of Completion.

Objectives:

- Demonstrate ability to use a computer and utilize computer programs to complete basic tasks
- Demonstrate ability to manage files and folder
- Define and use medical terminology basic word structure and body organization
- Define and use medical terminology suffixes and prefixes
- Define and use medical terminology for medical specialties and body systems
- Define legal and ethical responsibilities in healthcare
- Define privacy practices and HIPAA regulations in the medical setting
- Define legal terms
- Define the developmental stages related to psychology and patient communication
- Interpret the impact of cultural differences in healthcare
- Define and use medical terms used in psychiatry
- Define anatomy and physiology in relation to planes, cavities, regions, directions and systems
- Define anatomy, physiology, pathologies and associated treatment in relation to the integumentary system, skeletal system, muscular system, and nervous system
- Define anatomy, physiology, pathologies, and associated treatment in relation to the endocrine system, cardiovascular system, lymphatic system, and digestive system.
- Define anatomy, physiology, pathologies and associated treatment in relation to the respiratory system, urinary system and reproductive system
- Define the history of medicine, the role of the medical assistant, medical specialties, credentialing and personal attributes of health care personnel

- Apply proper telephone techniques, patient reception, appointment scheduling techniques and daily operations in a healthcare setting
- Create professional written communications
- Prepare patient records on paper and electronically including correct use of health information management
- Perform financial office procedures related to health care environment on paper and electronically
- Define medical office management
- Apply healthcare insurance types, utilization, and guidelines
- Utilize diagnostic coding systems
- Utilize procedural coding systems
- Demonstrate first aid techniques
- Demonstrate Healthcare Provider level CPR as defined by the American Heart Association
- Find job leads and connections
- Create resume and cover letter
- Complete job application and follow-up
- Perform well in a job interview

COURSE DESCRIPTIONS

Computer Concepts

1 Credit/30 Clock-Hours

In this course, you will learn about basic computer concepts that will help you succeed in your program of study. This course is the foundation course for all programs. The skills you learn in this course will be used through all your courses you take. As you progress through this course, you will be completing a series of activities that will build your computer knowledge and skills. Your knowledge and skills will add up to become a competency.

Objectives:

- Use the basic features of a learning management system to complete course work.
 - Demonstrate how to successfully login and logoff of Canvas
 - Demonstrate how to find a course
 - Show how to navigate through a course
 - Demonstrate how to submit assignment
 - Complete assessments
 - Demonstrate how to check grades
- Explain the parts of a computer and functionality of the hardware components
 - Describe the purpose of the basic hardware parts of a computer
 - Describe the functionality of computer components
- Demonstrate a basic ability to use a computer running either a Windows or Apple operating system
 - Demonstrate how to turn on the computer and login to the computer
 - Use basic desktop elements to complete tasks
 - Demonstrate file management skills
 - Demonstrate how to log off and shut down the computer
- Use Microsoft Word to generate document
 - Start Microsoft Word and choose a blank document
 - Create and format a document using the tools on the Ribbon
 - Save a document using the Backstage view
- Use a search engine to find information on the Internet
 - Differentiate between a search engine and browser

- Identify relevant keywords to perform an Internet search
- Use Internet search criteria to build web search queries
- Determine if the website is a credible source
- Explain malware and the kinds of damage it can cause to a computer

Word Basics

1 Credit/40 Clock-Hours

Course will introduce student to the basic functions and uses of MS Word software application, including the formatting and editing of documents, as well as features such as tables, styles, and mail merge. Prepares students with elements required for MOS exam.

Objectives:

- Demonstrate the use of the college LMS
- Demonstrate how to open, close, create, save, rename, and print MS Word documents
- Demonstrate how to use clipboard for cutting, copying and pasting functions
- Demonstrate how to format and edit text, tables, paragraphs, and pages
- Demonstrate how to add themes, styles, and templates to a document
- Demonstrate how to manage headers, footers, sections, and mail merge
- Demonstrate how to use macros
- Demonstrate how to use mail merge

Business Writing

2 Credits/70 Clock-Hours

Course presents elements of business writing, including grammar and proofreading review. Student will develop various business communication documents, including memos, email, and resumes.

Course presents elements of business writing, including grammar and proofreading review. Student will develop various business communication documents, including memos, email, and resumes.

Objectives:

- Navigate and use the school LMS
- Demonstrate the correct use of English grammar
- Identify common grammar errors
- Proofread a document for errors
- Create a variety of business documents, including emails, memos, and letters in proper format
- Develop a complete, ready-to-go resume, cover letter, and thank you note

Spreadsheets I

1 Credit/40 Clock-Hours

Course covers basic applications of Excel software. Coverage includes formatting and modifying cells and worksheets, use of simple functions, and creation of charts.

Objectives:

- Demonstrate the use of the college LMS
- Demonstrate how to open, close, create, save and rename, and print MS Excel workbooks
- Demonstrate how to use the clipboard for cutting, copying and pasting functions
- Demonstrate how to format text and cells
- Demonstrate how to enter simple functions
- Demonstrate how to create charts to display data
- Demonstrate how to organize data into tables

Medical Terminology

2 Credits/70 Clock-Hours

This course will introduce you to the skills necessary to interpret and understand medical terminology, in order to be successful in the pursuit of health occupation careers. This is accomplished by utilizing a method of study that not only instructs the students in building medical terms but also gives the student immediate application in utilizing the medical term. By knowing this you will recognize and understand this new language that will be essential as you begin a career in the healthcare environment!

Objectives:

- Define and use medical terminology basic word structure and body organization
- Define and use medical terminology suffixes and prefixes
- Define and use medical terminology for medical specialties and body systems

Anatomy & Physiology

1 Credit/50 Clock-Hours

Anatomy and physiology is the study of the structure and function of the human body. This course includes a review of all organ systems and includes disease processes and diagnostic treatment. It is important for a future healthcare professional to have a basic understanding of the structure of the body which is the anatomy portion. It is equally important to understand how each of the body systems functions by itself as well as working in collaboration with the other body systems.

Objectives:

- Interpret anatomy and physiology in relation to planes, cavities, regions, directions and systems
- Interpret basic anatomy, physiology, and pathologies as it relates to
 - Integumentary system
 - Skeletal system
 - Muscular system
 - Nervous system
 - Endocrine system
 - Cardiovascular system
 - Lymphatic system
 - Digestive system
 - Respiratory system
 - Urinary system
 - Reproductive system

Medical Law & Ethics

2 Credits/60 Clock-Hours

This course provides the student exposure to the legal and ethical issues that impact the healthcare setting.

Objectives:

- Recognize the meaning and use of legal terminology
- Apply legal expectations in healthcare
- Apply ethical standards in healthcare
- Demonstrate the principles of HIPAA regulations by completing the certification

Psychology for Healthcare

1 Credit/30 Clock-Hours

In this course, you will get an overview of the basic principles of communication and the impact of ethnic cultures in healthcare.

Objectives:

- Demonstrate communication skills within a healthcare setting

- Demonstrate cultural competence
- Define basic terms and conditions in psychiatry

Medical Office Procedures I

2 Credits/60 Clock-Hours

This course is designed to teach foundational information for those entering the healthcare field and the basic skills needed to perform clerical functions efficiently in a medical office setting.

Objectives:

- Describe foundational information related to the medical field
- Explain the reasons professionalism and work ethics are important in the medical field
- Demonstrate written communication in a healthcare setting
- Apply proper telephone techniques in a healthcare setting
- Apply proper patient reception and appointment scheduling techniques in a healthcare setting
- Apply daily operations in a healthcare setting
- Demonstrate how to properly create and maintain paper medical records
- Demonstrate how to properly create and maintain electronic medical records
- Apply meaningful use strategies to meet quality improvement outcome initiatives
- Demonstrate the principles of OSHA regulations by completing the OSHA certifications
- Describe Medication uses, names, classifications, and risks
- Explain the role of government agencies and regulation of medications
- Interpret medical documentation related to prescribed medications
- Describe various elements used when delivering patient education

Medical Office Procedures II

2 Credits/60 Clock-Hours

This course is designed to instruct the medical assistant student in the basic skills necessary to perform bookkeeping and financial functions in a medical setting.

Objectives:

- Perform financial office procedures related to health care environment on paper and electronically
- Define medical office management

Medical Office Procedures III

2 Credits/60 Clock-Hours

This course is designed to instruct the medical office administration student in the basic skills necessary to perform proper insurance, coding and billing procedures.

Objectives:

- Utilize diagnostic coding systems
- Utilize procedural coding systems
- Define healthcare insurance types, utilization, and guidelines
- Utilize health insurance claims

First Aid/CPR

0 Credits/10 Clock-Hours

With the completion of this class, the student will understand the importance of knowing what to do in a timely manner during and shortly after a medical emergency. Students will learn basics to control bleeding, perform CPR, and monitor a patient until advanced help arrives.

Objectives:

- Demonstrate first aid techniques

- Demonstrate Healthcare Provider level CPR as defined by the American Heart Association

Customer Relations**1 Credits/40 Clock-Hours**

This course will provide training in professional customer relationship skills, including time management, customer interaction skills, managing difficult customers, and stress management.

Objectives:

- Navigate and use the school LMS.
- Demonstrate exceptional customer service skills.
- Explain workplace skills as a customer service representative.
- Describe the importance of ethics in customer relations.
- Demonstrate professionalism as a customer service representative.
- Evaluate a given customer service dilemma or problem and apply a solution.
- Apply customer service communication using voicemail
- Explain techniques for stress management

Job Seeking Skills**0 Credits/15 Clock-Hours**

This course will prepare you to succeed, as we explore a variety of tools and strategies, to make your transition to employment as smooth as possible. Proper preparation is often as important as the skills you have already acquired. The process of obtaining employment is often discouraging and grueling. The Job Seeking Skills course will cover many aspects of job searching, including; summarizing your skills, searching for job leads in unconventional ways, filling out applications, writing a resume and cover letter, interview etiquette, and lastly, a follow up letter.

Objectives:

- Identify and explain personal employment direction and qualifications
- Complete the job application process
- Search for employment in their area of study and explain how social media will impact a job search
- Successfully complete a 20-minute mock interview

Medical Office Externship**3 Credit/160 Clock-Hours**

This course allows the medical office administration student the opportunity to demonstrate their administrative skills in a health care setting. This non-paid externship takes place in a working medical office or clinic under the supervision of a licensed physician.

Objectives:

- Apply knowledge related to Medical Office Administration procedures, processes, and environment
- Perform Medical Office Administration procedures safely and accurately
- Demonstrate professional behaviors in the healthcare setting



Utah System of Higher Education

Nail Technician Instructor

FY2023 / 5 Credits (150 Clock-Hours)

Nail Technician Instructor			
Institutions: Tooele			
<i>Certificate of Program Completion (Catalog Year: 2023, 5 Credits/150 Clock-Hours Required, CIP: 12.0413)</i>			
Core (5 Credits/150 Clock-Hours)		Credits	Clock-Hours
NTEI 2200	Nail Technician Instructor I	1	30
NTEI 2205	Nail Technician Instructor II	1	30
NTEI 2210	Nail Technician Instructor III	1	30
NTEI 2215	Nail Technician Instructor IV	1	30
NTEI 2220	Nail Technician Instructor V	1	30



Utah System of Higher Education

Nail Technician Instructor

FY2023 / 5 Credits (150 Clock-Hours)

PROGRAM DESCRIPTION

This program prepares a student to take the written test of the Utah Department of Professional Licensing exam to become a Nail Technician instructor. The program trains the student in a variety of settings using theory, classroom and records management, teaching methods and organization to take the DOPL instructor test under the direction of the Tooele Technical College Nail Technician Instructor.

Objectives:

- Proficient in basic teaching skills for career education instructors.
- Prove competency in effective communication with students, clients, and other instructors.
- Apply the techniques and guidelines for being an Instructor.
- Apply concepts for Professional Development as a Career Education Instructor.

COURSE DESCRIPTIONS

Nail Technician Instructor I

1 Credits/30 Clock-Hours

Course Description

In this course the Nail Technician Instructor students will be introduced to the art of teaching. They will learn about being a professional educator, job duties, classroom management and administrative duties. Students will be taught about lesson planning. They will be exposed to learning styles and will be given techniques for effective teaching and learning methods.

Objectives:

- Describe the role of a professional teacher including basic job duties, time management, professional ethics and best practices.
- Design a lesson plan including a list of teaching materials.
- Describe techniques for effective classroom management.
- Describe the administrative duties of a professional teacher.
- Define desired learning goals for students.
- Outline strategies for learning basic math and reading skills.
- Create a lesson plan teaching test taking skills and basic study skills.
- Identify multiple intelligences and learning styles.
- List and describe the four steps in learning.
- Identify effective teaching and learning methods.

Nail Technician Instructor II

1 Credits/30 Clock-Hours

This course is all about communication and providing information to students. Nail Technician Instructor students will learn techniques for effective communication and listening. Students will learn about presentation techniques, creating a positive classroom environment and will study learner behavior. Students will be exposed to some of the most common learning disabilities and how to accommodate these barriers. Student will also discuss other barriers to learning. Finally, students will review strategies for teaching to the fast-paced learner.

Objectives:

- Describe effective communication techniques and identify barriers to effective communication.
- Define and describe effective listening techniques and their role in effective communication.
- Identify various communication styles.
- Accurately describe the C-R-E-A-T-E model.
- Describe what makes an effective presentation.
- Describe a positive classroom environment.
- Identify principles for managing learner behavior, including difficult learner behavior.
- Identify special learning needs.
- List some of the most common learning disabilities
- Describe teaching techniques to accommodate some of the most common learning disabilities.



Utah System of Higher Education

Nail Technician Instructor

FY2023 / 5 Credits (150 Clock-Hours)

- Identify barriers to learning.
- Describe teaching techniques for the fast-paced learner.

Nail Technician Instructor III

1 Credits/30 Clock-Hours

In this course the Nail Technician Instructor student will go more in depth on curriculum development, lesson planning, grading methods, and available technologies for the classroom. Students will discuss strategies for effective academic advising and student motivation.

Objectives:

- Describe the steps and principles of curriculum development.
- Create a lesson plan for a variety of teaching scenarios.
- Describe different types of educational aids and technology for the classroom.
- Describe grading methods and grading components.
- Describe effective academic advising strategies.

Nail Technician Instructor IV

1 Credits/30 Clock-Hours

Nail Technician Instructor students will be learning about how to teach the business of salon work to students. This course covers how to teach salon philosophy, customer service, business management, marketing, building clientele, accounting requirements and salon profitability. Students will demonstrate the value of having a professional portfolio. Students will learn how to teach in a salon and how to manage multiple students including how to create a student orientation. Students will learn about student retention and will be able to identify the various roles of a professional educator.

Objectives:

- Describe salon philosophy, customer service, business management and salon profitability.
- List the steps to building a strong clientele list and techniques for marketing the salon.
- Describe salon accounting requirements.
- Create a professional portfolio with at least a couple of exhibits.
- Share techniques for salon teaching and managing multiple students.
- Describe student retention strategies and the importance of student retention.
- Design a new student orientation.
- Identify and describe various professional educator roles such as educator to learner, educator to educator, and educator to administration.

Nail Technician Instructor V

1 Credits/30 Clock-Hours

In this last course, Nail Technician Instructor students will review the importance of mental health and the value of laughter. Students will learn about teams and teamwork. Students will learn about goal setting and goal management. Students will learn about the process for evaluating professional performance and will review applicable industry law, rules and regulations. This course culminates with a exam review and a state practice exam.

Objectives:

- Describe the importance of maintaining a healthy mindset.
- Identify stress management techniques.
- Elaborate on the benefits of laughter in the workplace and the benefits to physical health.
- Describe what it means to have a strong work ethic.
- Describe models for goal setting the importance of goal management.
- Define term team and team work.
- Describe techniques for team building.
- Describe the process for evaluating professional performance.
- Review applicable industry law, rules and regulations.
- Complete a state licensing practice exam



Utah System of Higher Education
Cabinetry (Secondary)
FY2023 / 12 Credits (360 Clock-Hours)

Cabinetry (Secondary)			
Institutions: Uintah Basin			
<i>Certificate of Program Completion (Catalog Year: 2023, 12 Credits/360 Clock-Hours Required, CIP: 48.0703)</i>			
Core (12 Credits/360 Clock Hours)		Credits	Clock-Hours
CABM 1005	Woodworking	2	60
CABM 1015	Furniture Design 1	2	60
CABM 1025	Furniture Design 2	2	60
CABM 1035	Furniture Design 3	2	60
CABM 1045	Furniture Design 4	2	60
CABM 1055	Furniture Design 5	2	60



Utah System of Higher Education

Cabinetry (Secondary)

FY2023 / 12 Credits (360 Clock-Hours)

PROGRAM DESCRIPTION

The Cabinetry program is designed to teach the fundamentals of cabinet and furniture construction. While in the program, students will learn transferable, effective work skills that will be of value in most occupations, as well as in the cabinetry industry. Students will build a cabinet and or furniture project of their choice. Students will be instructed in the processes of woodworking from fundamentals of planning and design to finish work. The student will be instructed in the safe use of woodworking power tools and machines.

Objectives:

- Construction Safety
- Gain Knowledge on the Fundamentals of Cabinetry and Furniture Construction
- Introductory Project Management Skills
- Design and Construct a Project

COURSE DESCRIPTIONS

Woodworking

2 Credits/60 Clock-Hours

Learn basic math measuring concepts. Discover basic concepts in design, joinery, finishes, hardware, and complete cabinet construction. Safety will be stressed with every concept.

Objectives:

- Demonstrate Construction Math
- Design Planning and Estimating
- Demonstrate Knowledge of Abrasives and Finishes
- Demonstrate Cabinet Construction
- Demonstrate Safety
- Demonstrate Knowledge of Joinery, Fasteners and Adhesives
- Demonstrate Cabinet Hardware Installation

Furniture Design I

2 Credits/60 Clock-Hours

Safely design, plan, and estimate a complete cabinet project of choice. Study and work through completing the project using the processes of joinery, abrasives and finishes, hardware installation, cabinet construction, and moldings and millwork.

Objectives:

- Demonstrate Construction Math
- Demonstrate Design Planning and Estimating
- Demonstrate Abrasives and Finishes
- Demonstrate Cabinet Construction
- Demonstrate Safety
- Demonstrate Knowledge of Joinery, Fasteners and Adhesives
- Demonstrate Cabinet Hardware Installation
- Demonstrate Moldings and Millworks

Furniture Design II

2 Credits/60 Clock-Hours

Safely design, plan, and estimate a complete cabinet or furniture project of choice. Develop level II skills in cabinet making through continued use of the process joinery, abrasives and finishes, hardware installation, cabinet construction, and moldings and millwork.



Utah System of Higher Education

Cabinetry (Secondary)

FY2023 / 12 Credits (360 Clock-Hours)

Objectives:

- Demonstrate Construction Math – Level II
- Design Planning and Estimating – Level II
- Demonstrate Knowledge of Abrasives and Finishes – Level II
- Demonstrate Cabinet Construction – Level II
- Demonstrate Safety- Level II
- Demonstrate Knowledge of Joinery, Fasteners and Adhesives – Level II
- Demonstrate Cabinet Hardware Installation – Level II
- Demonstrate Moldings and Millworks – Level II

Furniture Design III

2 Credits/60 Clock-Hours

Safely design, plan, and estimate a complete cabinet or furniture project of choice. Develop level III skills in cabinet making through continued use of the process joinery, abrasives and finishes, hardware installation, cabinet construction, and moldings and millwork.

Objectives:

- Demonstrate Construction Math – Level III
- Design Planning and Estimating – Level III
- Demonstrate Knowledge of Abrasives and Finishes – Level III
- Demonstrate Cabinet Construction – Level III
- Demonstrate Safety- Level III
- Demonstrate Knowledge of Joinery, Fasteners and Adhesives – Level III
- Demonstrate Cabinet Hardware Installation – Level III
- Demonstrate Moldings and Millworks – Level III

Furniture Design IV

2 Credits/60 Clock-Hours

Safely design, plan, and estimate a complete cabinet or furniture project of choice. Develop level IV skills in cabinet making through continued use of the process joinery, abrasives and finishes, hardware installation, cabinet construction, and moldings and millwork.

Objectives:

- Demonstrate Construction Math – Level IV
- Design Planning and Estimating – Level IV
- Demonstrate Knowledge of Abrasives and Finishes – Level IV
- Demonstrate Cabinet Construction – Level IV
- Demonstrate Safety- Level IV
- Demonstrate Knowledge of Joinery, Fasteners and Adhesives – Level IV
- Demonstrate Cabinet Hardware Installation – Level IV
- Demonstrate Moldings and Millworks – Level IV

Furniture Design V

2 Credits/60 Clock-Hours

Safely design, plan, and estimate a complete cabinet or furniture project of choice. Develop advance level V skills in cabinet making through continued use of the process joinery, abrasives and finishes, hardware installation, cabinet construction, and moldings and millwork.

Objectives:

- Demonstrate Construction Math – Level V
- Design Planning and Estimating – Level V
- Demonstrate Knowledge of Abrasives and Finishes – Level V



Utah System of Higher Education

Cabinetry (Secondary)

FY2023 / 12 Credits (360 Clock-Hours)

- Demonstrate Cabinet Construction – Level V
- Demonstrate Safety- Level V
- Demonstrate Knowledge of Joinery, Fasteners and Adhesives – Level V
- Demonstrate Cabinet Hardware Installation – Level V
- Demonstrate Moldings and Millworks – Level V



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

September 16, 2022

USHE Protocols for Senate Bill 127 (2022) Early Literacy Outcomes Improvement

Overview

In its 2022 session, the Utah State Legislature passed Senate Bill 127, which is designed to enhance and align strategies to improve literacy outcomes for children in the early childhood education years (Kindergarten through third grade). The law requires action by both the Utah State Board of Education (USBE) and the Utah System of Higher Education (USHE) through the Office of the Commissioner of Higher Education (OCHE).

The law provides some fiscal support for colleges or schools of education at the six USHE universities to hire a reading specialist faculty member to provide science of reading instruction to future teachers. Legislative appropriations of \$90,000 to each institution will fund 75% of the new faculty position at the six universities; the universities will provide 25% matching funds from their budgets.

General Qualifications for Reading Specialist Faculty Positions

Commissioner's office staff have met with USBE officials and with the Utah Council of Education Deans (UCED) from the six public universities to determine the following general qualifications for the reading positions in each of these Elementary Education programs:

Candidates must:

1. have strong knowledge in the research and practice of the science of reading (SOR) and science of reading instruction (SORI);
2. be able to demonstrate competence in the use of assessment in SOR and SORI;
3. have education experience with struggling readers in K12 classrooms, clinics, or similar settings;
4. have a terminal degree in teacher education or related field.

Individual institutions may add additional criteria in their job search announcement, but the focus of the faculty position must be on SOR or SORI.

Process for Distribution of Legislative Funds

Funding for these positions will be available after July 1, 2022. The legislative monies will be transferred to the institutions through the Commissioner's office.

On or before September 16, 2022, each of the six eligible colleges/schools of education will submit a memo to UCED and OCHE that includes the following:

1. a dean's statement of verification of matching funds for the faculty hire;
2. a copy of their program's SOR/SORI job announcement;
3. a brief statement of how the new faculty position is being used to enhance and align reading education in the early elementary teacher education programs;
4. a projected timeline of the hiring process.

Collaboration with USBE to Meet Legislative Requirements

USBE is working on establishing goals and strategies for supporting literacy coaching and reading skills development in early school years. It is organizing a panel on the science of reading and establishing criteria to oversee assessment procedures, evaluation, and tutoring of students, especially the bottom 25% performing schools in the state. This cross-agency panel will help universities as they hire faculty members and will meet on an ongoing basis to insure the goals and intentions of the legislation are being met.

Recommendation

The Commissioner recommends that the Board approve this item.



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

September 16, 2022

USHE Protocols for Senate Bill 196 (2015) Mathematics Competency Initiative

Overview

SB 196 *Mathematics Competency Initiative* was passed during the 2015 Utah legislative session to help the Utah System of Higher Education (USHE) increase the number of students who complete a higher education Quantitative Literacy (QL) General Education requirement. It is designed to help qualified, academically advanced secondary students meet the college requirement through the concurrent enrollment program prior to graduating from high school. Funding for the initiative was provided by SB 196 (2015), with metrics assigned via HB 1 (2017).

The objectives of the initiative included:

- Some funding to allow the Commissioner's office to oversee the CE program, including the creation of a CE Common Participation Form (tools were developed and in place by July 1, 2017, but need regular maintenance and upkeep);

Academic efforts including:

- Increasing the number of mathematics and statistics teachers qualified to become higher education adjunct faculty and college-level Quantitative Literacy instructors;
- Increasing the number of students earning the Quantitative Literacy credits prior to enrolling in college by 5% from 2015 levels.

SB196 allowed for the Commissioner's office to send pass-through funds to institutions to meet these academic objectives. The first several years of pass-through funds were used primarily to help meet capacity demands for Quantitative Literacy General Education courses offered via concurrent enrollment.

Examples included:

1. Using USHE graduate programs to increase the pool of high school faculty who can meet minimal concurrent enrollment adjunct qualifications to teach mathematics and statistics (at least 18 graduate credits in mathematics and a Level IV Endorsement). The funding provided tuition assistance for high school teachers to take graduate Mathematics courses and was also used to pay for higher education faculty and staff time.

2. Increasing the number of sections of college-level Quantitative Literacy courses offered at local high schools through buy-outs of teacher preparation periods and other strategies.
3. Pilot programs focused on using multiple measures for placing students into Quantitative Literacy courses, for example by allowing students into QL courses upon successful completion of Secondary Math I, II, and III, with a C or higher rather than relying only ACT scores.

Funds were distributed in two three-year rounds, from 2016-2019 and from 2019-2022.

Shift in focus for the third round of SB196 funding

Now that institutions of higher education are adequately positioned to meet the capacity needs of Quantitative Literacy concurrent enrollment offerings, the focus of the grant program is shifting toward student course success, in conjunction with the Board's strategic plan emphasis on addressing completion gaps for underrepresented groups of students and the introductory course success tactic. USHE degree-granting institutions were asked to propose projects that will help them identify qualified students (defined as students who have completed Secondary Mathematics I, II, and III with a C or better course grade or other measures of preparation) who have not self-selected to enroll in a CE Quantitative Literacy course, recruit them to participate, and provide academic supports to help them succeed. Institutions were encouraged to specify how recruitment approaches and instructional supports would target underserved populations, as defined by race, ethnicity, and income status, to address participation and completion gaps in math.

Institutions proposed a variety of approaches for addressing the success gap in Quantitative Literacy CE courses, including:

- Using school data and faculty and staff recommendations to identify qualified students who have completed Secondary Mathematics I, II, and III with a C or better course grade and developing outreach plans to encourage them to enroll in a CE QL math course, as well as developing outreach plans for parents of students identified for QL recruitment.
- Tracking student progress through QL courses and creating support plans to ensure course success.
- Identifying additional academic supports required to ensure students' success in CE, for example, by scheduling in-school homework hours for QL students, providing tutors, teacher mentoring, campus field trips, etc.

Process for Distribution of Legislative Funds

The source of funding for this award is the SB 196 Mathematics Competency state appropriation, and \$488,594 in pass-through funding was awarded. The seven degree-granting institutions that applied for and received funding were Utah State University, Weber State University, the University of Utah, Utah Valley University, Snow College, Southern Utah University, and Utah Tech University. The award cycle

began August 1, 2022, and ends May 30, 2025, with a project accountability report due June 15, 2023, 2024, and 2025.

Recommendation

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



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

September 16, 2022

Technical Education and Board Policy Alignment

Background

Because the Utah System of Technical Colleges joined the Utah System of Higher Education (“USHE”) in July 2020, the Office of the Commissioner has recently been working to review all technical college policies against existing Board policies to recommend consolidation and/or rescission of policies where necessary to ensure alignment between technical colleges and degree-granting institutions. This project furthers the Board’s Strategic Plan priority of System Unification.

It is recommended that the Board rescind the following policies as the concepts covered by them are already addressed in existing Board policy:

- Technical College Policy 209 – Institutional Civil Liberties Policy Review (covered by Board Policy R263 – Institutional Policy Review); and
- Technical College Policy 220 – Campus Safety (covered by Board Policy R262 – Student Safety).

It is also recommended that the Board rescind the following policy as it does not comport with current Title IX regulations:

- Technical College Policy 210 – Cross College Title IX Investigation/Adjudication.

In its September meeting, the Executive Committee considered these rescissions and voted to recommend them to the Board for consideration on the Board’s September consent calendar.

Commissioner’s Recommendation

The Commissioner recommends rescinding the above policies to ensure policy alignment between technical colleges and degree-granting institutions.

1 September 2022

TO: The Utah Board of Higher Education

FR: President Astrid S. Tuminez

RE: Leave of Absence Proposal

This is a proposal for a 10-week Leave of Absence (LOA) as provided for in Policy R210 in the Utah System of Higher Education Board Policies.

I would like to propose an LOA from Utah Valley University for a period of ten weeks some time between commencement in May 2023-July 2023.

The purpose of the LoA will be for professional development and personal renewal.

PROFESSIONAL DEVELOPMENT

For the past few years, I have been drafting a memoir on and off, but have never had time to focus and complete the draft. As you know, education has completely changed my life—taking me from the slums of Iloilo City (where my father raised seven children on less than \$50 a month) to BYU, Harvard, MIT and a global career, including the presidency of one of the largest and most dynamic universities in the US (UVU). I will use my leave to complete my manuscript, with the hope that a published book can inspire others to invest and persevere in their education.

PERSONAL RENEWAL

I plan to spend two weeks in the villages of my parents in the Philippines to do some research with relatives and older folks who will likely not be around much longer. This visit back to my roots will be personally energizing and inspiring.

SUPPORT FROM THE SYSTEM

I plan to do most of my writing as a visiting scholar at the Lee Kuan Yew School of Public Policy in Singapore. Singapore would be a fantastic base for peace, quiet, and reflection. It will also make it easy for me to make my trip to the Philippines.

Two other potential benefits could come from being in Singapore: 1) I will meet with former executive education colleagues at the National University of Singapore to see if we might collaborate on an executive leadership program that would bring Asian leaders to Silicon Slopes and introduce them to the entrepreneurial culture of Utah, and 2) I would like to bring a Utah legislative delegation to Singapore and will facilitate meetings for them on innovation and good governance (I have explored this with a few legislators).

I would like to ask USHE for support of my flights to and from Singapore, and an amount to defray the cost of accommodation. I will see if the National University of Singapore would be willing to let me stay in faculty accommodation.

Thank you very much for considering this proposal!