

# WELCOME

Utah Board of Higher Education  
March 24, 2023



SLCC



75 celebrating  
YEARS

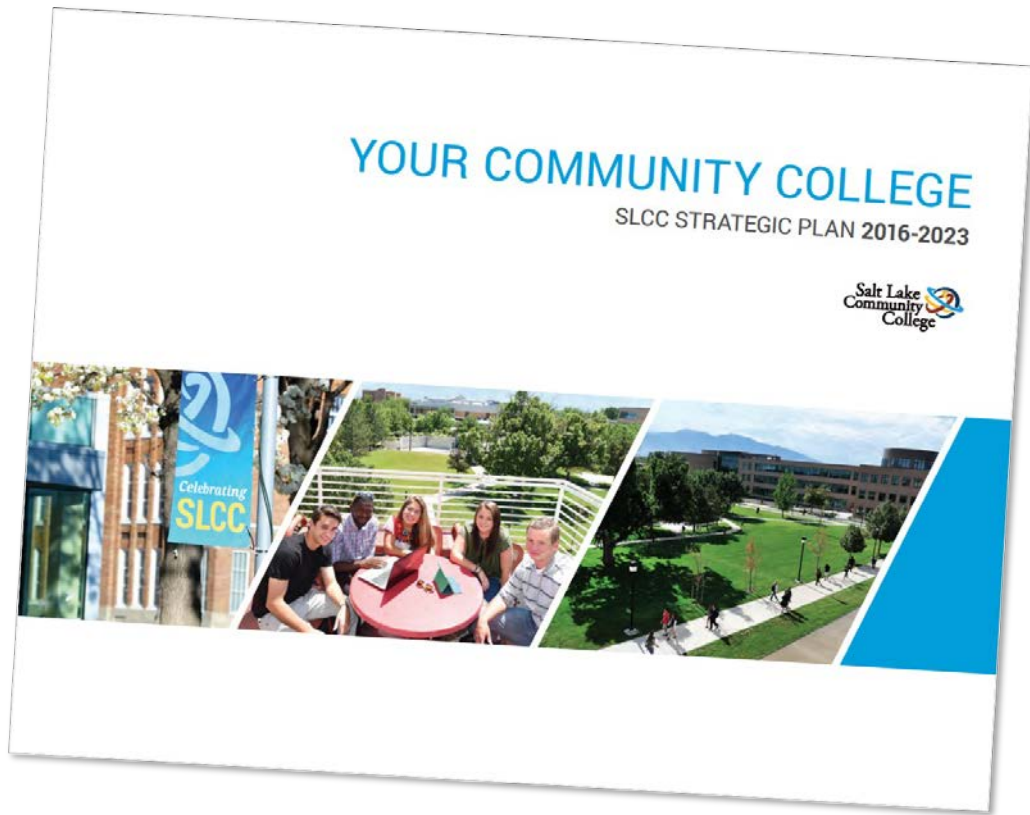
# YOUR COMMUNITY COLLEGE

SLCC STRATEGIC PLAN 2016-2023

OUTCOMES REPORT 2023  
CELEBRATING OUR SUCCESS



# SLCC Strategic Goals



1. Increase Student Completion
2. Achieve Equity in Student Participation and Completion
3. Improve Transfer Success
4. Align with and Respond to Workforce Needs
5. Secure Institutional Sustainability & Capacity

# Five Goal Areas – 2023 Outcomes Report

Goal Area	Measure	2022 Outcomes	% Achieved	Trend
Completion	Six-Year Completion Rate	29%	73%	↑
Equity-Participation	Participation Ratio	1:1	100%	↑
Equity-Completion	Opportunity Gap in Completion	-18%	82%	↑
Transfer	Transfer Conversion Rate	40%	67%	→
Workforce	Competitive Wage Rate	70%	108%	↑
Sustainability	Annualized Budget-related FTE	12,266	68%	↓



# Completion / Equity in Participation

- ***PACE program*** expanded to three additional high schools
- ***6,500+ SLCC Promise grants awarded*** to help cover the cost of tuition: (\$4.7million)
- ***Recruitment strategies*** supported growth among adult students, male students, and West Side communities
- ***13 on-site bachelor's degrees***

# Completion / Equity in Participation

- **SLCC Pathways implemented** with 8 areas of study, proactive advising, and redesigned curriculum
- **Open Educational Resources (OER)** national leadership saving students nearly \$25 million
- **MySuccess** leveraged to support nearly 4,000 underrepresented and first-generation students
- **Student employment** more than doubled work-study occupancy including 700 college internship positions

# Equity in Completion

- ***Search Advocate Program launched***, training over 100 search advocates.
- ***Faculty Fellowships*** and ***Racial Equity in the Professoriate*** programs created to recruit and retain diverse faculty members.
- ***West Valley Center opened*** to better serve west side community.
- ***Dream Center opened*** to support undocumented students, providing advising and mentorship, and promoting advocacy and awareness for undocumented and mixed-status families
- ***Hispanic-Serving Institution (HSI) commitment to*** lead the state in Latinx; hired director of HSI initiatives



# Strengthen Transfer

- **Herriman Campus**, SLCC + U of U set to open Fall 2023.
  - Select AS/AA degrees aligned to specific bachelor's degrees in one location.
- **Helped establish and contribute to Statewide Transfer Council** created to improve articulation across institutions
- **Increase in On-site bachelor's degrees**
- **78 program-to-program articulation agreements added and updated** at partner universities.

# Workforce Responsiveness

- **Westpointe Center opened**, providing state-of-the-art facilities and focus on high-wage, high-demand programs.
- Re-launched **Salt Lake Technical College**, aligning programs and curriculum with sister technical colleges throughout Utah.
- **Program Advisory Committee** redesigned to better engage industry.
- **Non-credit to credit articulation agreements formalized**.
- **Workforce and Economic Development** department formed, resulting in numerous state-wide partnerships, and new and enhanced programming.

**TECH  
READY**

**FUTURE  
SET**

*CAREERS THAT WORK*



SALT LAKE  
**TECH** |  SLCC

**WORK  
SMARTER WITH  
SALT LAKE TECH**

*CAREERS THAT WORK*



SALT LAKE  
**TECH** |  SLCC

  
**SLCC**

CELEBRATING  
**75**  
YEARS  
1948-2023

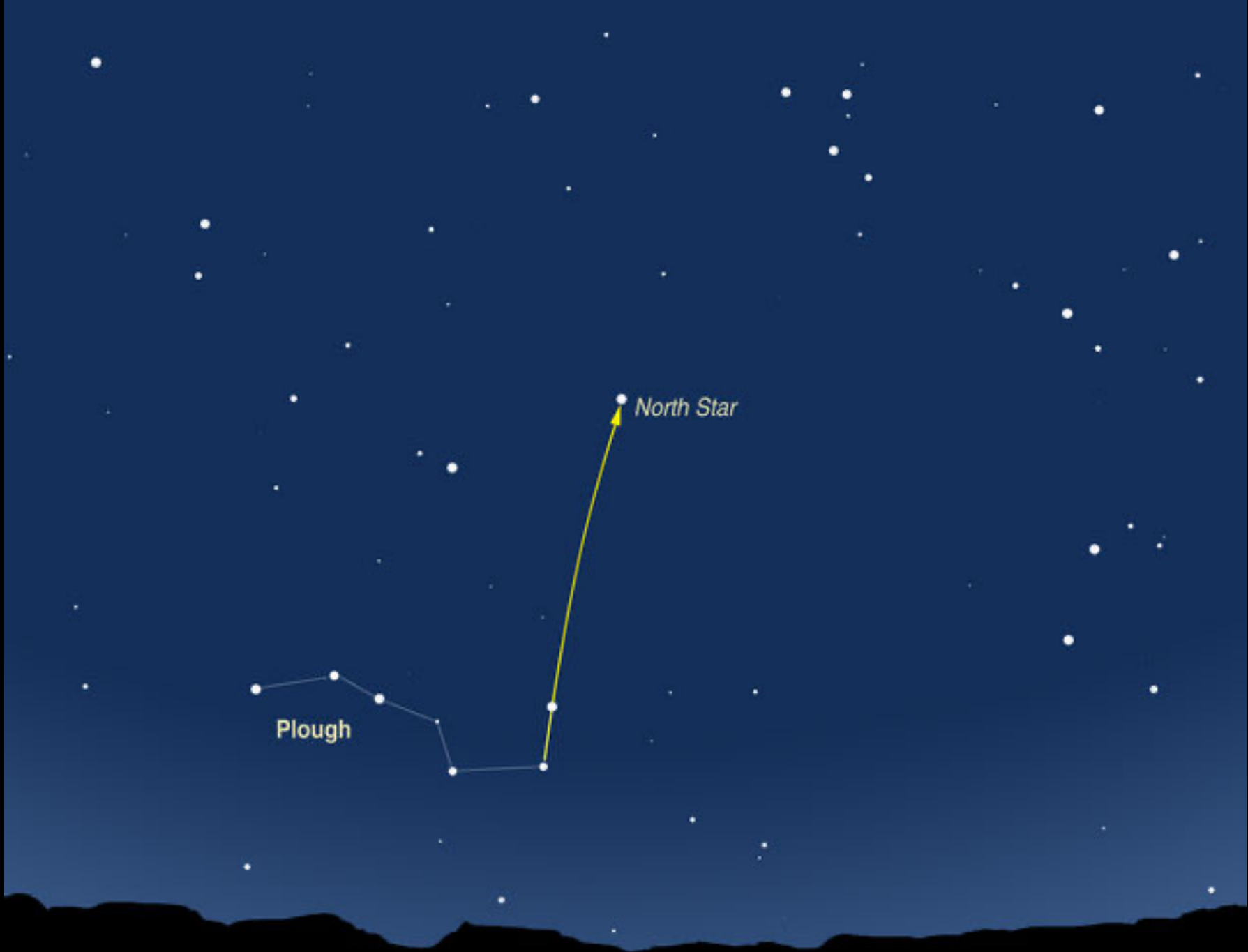


# “I’m in ...” Campaign

- **\$47 million** raised from over 1,700 donors in the *comprehensive campaign*, exceeding the goal of \$40 million.
- **Gail Miller School of Business** named in honor of Gail Miller’s nationwide business legacy. Business Building named the Larry H. and Gail Miller Foundation Building with campaign gift to transform existing business building.
- **Annual Day of Giving** added to development suite of support, realizing more than \$1M in donations over three years.

# Merak Star Committee





Plough

North Star

# The Merak Star Committee

*The Merak Star committee will identify the most critical factors we must attend to for a prosperous future of SLCC. The Merak Star committee will synthesize the work of each subcommittee into a short report and presentation. The group will not be proposing specific actions (at least not this year), but rather identifying the strengths, weaknesses, opportunities, and threats that SLCC faces in the coming years. The report should clearly identify areas where the next strategic plan will focus to create the next phase of the SLCC experience*

The committee will:

- Host regular meetings to discuss subcommittee work and discuss how the ideas from the committee work intersects.
- Present at SLCC360 on status and current thinking
- Draft a report for dissemination to the college community
- Present this report at an institutional and community forum in the Fall of 2023



# The Merak Star Project

## Story

*What is our legacy and institutional character?*

Led by VP McFarlane

## Talent & Capacity

*What are the organizational capacities and strengths?*

Led by VP Martin

*SLCC is your community college. We engage and support students in educational pathways leading to successful transfer and meaningful employment.*

## Big Trends

*What macro trends impact SLCC's future?*

Led by VP Aird

## Differentiate and Compete

*Who does SLCC serve and why do they attend or not?*

Led by Provost Sanders

Adapted from *Academic Strategy: The Management Revolution in American Higher Education*, George Keller, John Hopkins University Press, 1983



# UTAH SYSTEM OF HIGHER EDUCATION

March 24, 2023

2023 General Session Appropriations Summary



UTAH  
SYSTEM OF  
HIGHER  
EDUCATION

# Systemwide Totals

## OPERATIONAL BUDGET TAX FUNDS CHANGES

- One-Time: \$25.4 Million
- Ongoing: \$223.0 Million
- Total: \$248.4 Million

## CAPITAL PROJECT TAX FUNDS CHANGES\*

- One-Time: \$483.1 Million
- Total: \$483.1 Million

## TOTAL OPERATIONAL & CAPITAL PROJECT TAX FUNDS CHANGES

- One-Time: \$508.5 Million
- Ongoing: \$223.0 Million
- Total: \$731.5 Million

\*Includes \$110 million to DFCM for construction cost overruns and \$50 million for Convergence Hall at the Point. Does not include base budget appropriations to the capital projects funds or capital project fund balances.

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# Tax Funds Appropriations to Operating Budgets & New Capital Funding

2023-24 Tax Fund Appropriations by Institution	2023-24 Adjusted Beginning Base Budget	2023-24 Ongoing Changes	% Change	2023-24 One-time Changes	% Change	2023-24 Total Changes	% Change	2023-24 Operating Budget
University of Utah	\$420,059,700	\$63,718,900	15.2%	\$7,695,100	1.8%	\$71,414,000	17.0%	\$491,473,700
Utah State University	\$288,610,800	\$32,310,100	11.2%	\$14,331,300	5.0%	\$46,641,400	16.1%	\$335,252,200
Weber State University	\$116,790,600	\$14,014,400	12.0%	\$4,179,800	4.3%	\$18,194,200	15.6%	\$134,984,800
Southern Utah University	\$64,354,700	\$8,983,100	14.0%	\$4,020,500	6.2%	\$13,003,600	20.2%	\$77,358,300
Snow College	\$40,950,300	\$4,251,300	10.4%	\$1,965,000	7.7%	\$6,216,300	18.1%	\$47,166,600
Utah Tech University	\$58,176,700	\$7,026,000	12.1%	\$1,836,700	3.2%	\$8,862,700	15.2%	\$67,039,400
Utah Valley University	\$164,597,800	\$21,247,800	12.9%	\$8,864,000	5.4%	\$30,111,800	18.3%	\$194,709,600
Salt Lake Community College	\$128,766,700	\$13,451,400	10.4%	\$3,163,000	2.5%	\$16,614,400	13.4%	\$145,381,100
Bridgerland Technical College	\$20,299,400	\$2,660,300	13.1%	\$218,000	1.1%	\$2,878,300	14.2%	\$23,177,700
Davis Technical College	\$24,058,100	\$3,217,900	13.4%	\$322,200	1.3%	\$3,540,100	14.7%	\$27,598,200
Dixie Technical College	\$11,699,900	\$1,868,000	16.0%	\$254,200	2.2%	\$2,122,200	18.1%	\$13,822,100
Mountainland Technical College	\$23,388,700	\$5,854,400	25.0%	-\$1,232,100	-5.3%	\$4,622,300	19.8%	\$28,011,000
Ogden-Weber Technical College	\$21,572,700	\$2,576,800	11.9%	\$385,800	1.8%	\$2,962,600	13.7%	\$24,535,300
Southwest Technical College	\$8,092,600	\$936,100	11.6%	\$185,600	2.3%	\$1,121,700	13.9%	\$9,214,300
Tooele Technical College	\$7,485,100	\$1,480,000	19.8%	-\$398,100	-5.3%	\$1,081,900	14.5%	\$8,567,000
Uintah Basin Technical College	\$11,897,500	\$1,445,700	12.2%	\$185,700	1.6%	\$1,631,400	13.7%	\$13,528,900
UBHE Statewide Programs & Adm*	\$73,742,000	\$38,003,600	51.5%	-\$20,618,700	43.9%	\$17,384,900	49.1%	\$91,126,900
<i>Operating Budget Total</i>	<i>\$1,484,543,300</i>	<i>\$223,045,800</i>	<i>15.0%</i>	<i>\$25,358,000</i>	<i>5.8%</i>	<i>\$248,403,800</i>	<i>16.7%</i>	<i>\$1,732,947,100</i>
<i>New Capital Projects Funding**</i>				<i>\$483,110,600</i>				
<b>Total New Operating &amp; Capital</b>		<b>\$223,045,800</b>		<b>\$508,468,600</b>		<b>\$731,514,400</b>		

\*Increases for Utah Board of Higher Education and Statewide Programs are a result of appropriations which will directly flow to institutions or students

\*\*Includes \$110 million to DFCM for cost overruns & \$50 million for Convergence Hall at the Point. Does not include base budget appropriations to capital projects funds or capital project fund balances.

<b>Table 1: State-Funded Capital Projects</b>				
<b>Project</b>	<b>From CPF Base*</b>	<b>Add'l Funds</b>	<b>Total</b>	<b>State O&amp;M</b>
New Buildings and Renovations				
MTC - Wasatch Campus	\$26,620,300	\$39,116,200	\$65,736,500	\$848,200
UU - Computing & Engineering Building	\$35,543,000	\$72,801,200	\$108,344,200	\$2,302,300
UU - Monson Center Building		\$1,000,000	\$1,000,000	
UU - West Valley Hospital		\$25,000,000	\$25,000,000	
UU - Huntsman Mental Health Crisis Receiving Center		\$6,000,000	\$6,000,000	
WSU - Missile & Energy Research Center (MERC)**		\$20,000,000	\$20,000,000	
UVU - Lehi Campus for Health Prof Renovations		\$4,000,000	\$4,000,000	
UTU - Cox Performance Arts Center Renovation		\$28,000,000	\$28,000,000	
Snow - Innovative Agricultural Center		\$1,500,000	\$1,500,000	
System - Construction Inflation on Previous Projects		\$110,000,000	\$110,000,000	
Convergence Hall at the Point		\$50,000,000	\$50,000,000	
New O&M and Land Bank				
UU - Fort Douglas Property Transfer		\$100,000,000	\$100,000,000	
Snow - Central Valley Medical Center Landbank		\$2,000,000	\$2,000,000	
Snow - Jorgensen Property Landbank		\$850,000	\$850,000	
Snow - Triple D Landbank		\$3,000,000	\$3,000,000	
UTU - Landbank		\$1,340,000	\$1,340,000	
WSU - Farmington Station Landbank & Infrastructure		\$11,023,800	\$11,023,800	
DXTC - Washington County Bond Defeasance		\$7,479,400	\$7,479,400	
SLCC - Business Building Expansion & Remodel				\$767,400
SUU - Buisness Building West Addition				\$92,100
USU - Huntsman Experiential Learning Center				\$393,500
USU - Science Engineering Research Building Renovation				\$29,600
USU - Monument Valley Academic Building O&M				\$107,200
WSU Engineering Technology Building Renovation O&M				\$339,700
DTC - Simmons Building				\$140,000
<b>Total - State-Funded Capital Projects</b>	<b>\$62,163,300</b>	<b>\$483,110,600</b>	<b>\$545,273,900</b>	<b>\$5,020,000</b>

\*CPF = Capital Projects Fund

\*\*Funding intended to support acquisition of capital equipment

Note: S.B.3 Intent language intends USU to use a portion of \$18,000,000 appropriated in the 2022 GS for the School of Veterinary Medicine for O&M

# Capital Project Funds

**Table 3: Capital Projects Restricted Fund (Dedicated Funding) Balances**

Institution	Beginning Balance	Base Budget Allocation	Appropriated in GS 22	Estimated Balance
Degree-Granting		\$100,689,700		
<i>University of Utah</i>	\$15,371,500	\$20,171,500	-\$35,543,000	\$0
<i>Utah Valley University</i>		\$15,079,000	\$0	\$15,079,000
<i>Utah State University</i>		\$14,260,500	-\$14,200,000	\$60,500
<i>Southern Utah University</i>		\$12,510,000	-\$12,500,000	\$10,000
<i>Utah Tech University</i>		\$11,341,000	\$0	\$11,341,000
<i>Weber State University</i>		\$10,277,800	-\$8,332,400	\$1,945,400
<i>Salt Lake Community College</i>	\$9,031,700	\$9,031,700	-\$18,063,400	\$0
<i>Snow College</i>	\$8,018,200	\$8,018,200	\$0	\$16,036,400
Technical	\$7,310,000	\$19,310,300	-\$26,620,300	\$0
<b>Total - Capital Projects Fund</b>	<b>\$39,731,400</b>	<b>\$120,000,000</b>	<b>-\$115,259,100</b>	<b>\$44,472,300</b>

# Compensation

## COMPENSATION

- 8.75% Discretionary Salary Increase: \$116.8 Million
- Health & Dental Renewal: \$13.3 Million
- 12.5% Tuition Freeze Offset: \$18 million
- Total: \$148.1 Million

### SB 8 State Agency and Higher Education Compensation Appropriations

- Long Title Language: *provides funding for an 8.75% discretionary compensation increase for higher education employees; provides funding for an average 7.2% increase in health insurance benefits rates and increase in dental insurance benefits rates for state and higher education employees*

### SB 3 Appropriations Adjustments

- *The Legislature intends that in addition to the 8.75% compensation increase included in State Agency and Higher Education Compensation Appropriations (House Bill 8, 2023 General Session), state institutions may use performance funding to provide additional compensation increases to higher education employees*

# Performance Funding

## PERFORMANCE FUNDING

- Technical College Growth & Capacity: \$10,467,100
- Degree-Granting Performance Funding: \$35,000,000
  - HB 3: \$35,000,000 in one-time appropriations in FY 2023 w/non-lapsing authority
  - SB 2: \$35,000,000 in ongoing appropriations in FY 2024 w/one-time back out

## SB 3 Appropriations Adjustments

- *Under terms of Utah Code Annotated Section 63J-1-603, the Legislature intends that up to <one-time funding amount> of appropriations provided for Performance Funding - Degree Granting Institutions in H.B. 3 not lapse at the close of FY 2023 and may be used toward the new performance funding model in subsequent years.*
- *The Legislature intends that when drafting base budget bills for the 2024 General Session, the Legislative Fiscal Analyst shall reallocate ongoing Higher Education Performance Funding provided by New Fiscal Year Supplemental Appropriations Act (Senate Bill 2, 2023 General Session), Item 135, to individual institutions ongoing for FY 2025 based on the new performance funding model established in Utah Code Annotated title 53B Chapter 7 Part 7.*



# Degree-granting Performance Funding In FY 2024 & 2025

Institution	FY 2024 Performance Funding Appropriations Detail			Ongoing Available by Metric*		
	Original Eligible Amount	One-Time Appropriations	One-Time Reallocation	Access	Timely Completion	High Yield Awards
University of Utah	\$10,138,013	\$7,365,700	-\$2,772,313	\$3,379,338	\$3,379,338	\$3,379,338
Utah State University	\$7,004,200	\$5,171,000	-\$1,833,200	\$2,334,733	\$2,334,733	\$2,334,733
Weber State University	\$3,571,400	\$4,640,700	\$1,069,300	\$1,190,467	\$1,190,467	\$1,190,467
Southern Utah University	\$2,308,425	\$2,999,500	\$691,075	\$769,475	\$769,475	\$769,475
Utah Tech University	\$1,928,063	\$2,505,300	\$577,238	\$642,688	\$642,688	\$642,688
Utah Valley University	\$5,473,738	\$7,112,500	\$1,638,763	\$1,824,579	\$1,824,579	\$1,824,579
Snow College	\$1,113,875	\$1,447,300	\$333,425	\$371,292	\$371,292	\$371,292
Salt Lake Community College	\$3,462,288	\$3,758,000	\$295,713	\$1,154,096	\$1,154,096	\$1,154,096
<b>Total</b>	<b>\$35,000,000</b>	<b>\$35,000,000</b>	<b>\$0</b>	<b>\$11,666,667</b>	<b>\$11,666,667</b>	<b>\$11,666,667</b>

\*Amounts may change slightly based on FTE/Appropriated Budget updates next year

# Other Intent Language

## SB 2 New Fiscal Year Supplemental Appropriations Act

- **GROWTH FUNDING:** *The Legislature intends that the Utah System of Higher Education report to the Legislative Fiscal Analysts Office by December 1, 2023, estimates for growth funding based on net growth.*
- **BUDGET FUN:** *The Legislature intends that the Utah System of Higher Education (USHE) work with the Office of the Legislative Fiscal Analyst (LFA) and the Division of Finance during the 2023 Interim to create a budget that reflects all sources of revenue and all expenses and expenditures for each institution of higher education. USHE and LFA shall report that budget to the Higher Education Appropriations Committee before its final 2023 Interim meeting for potential inclusion in an appropriations act.*

## SB 146 Higher Education Governance Amendments

- **NEW MODEL PERFORMANCE FUNDING:** 53B-7-705 will allow performance funding to be ‘earned-back’ during the 5-year performance period.
- **RFA REQUIRE BOARD APPROVAL:** 53B-1-402 requires the Board to provide to the HEAS all projects and proposals for which the board or an institution seeks an appropriation.

# MOTION

I move to approve Utah Tech University's new graduate differential tuition schedules for Master of Sports Management, Master of Nursing Education Leadership, and Occupational Therapy Doctorate.



# 2023-24 Tuition and Student Fees Proposal

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**Noelle Cockett, USU President**

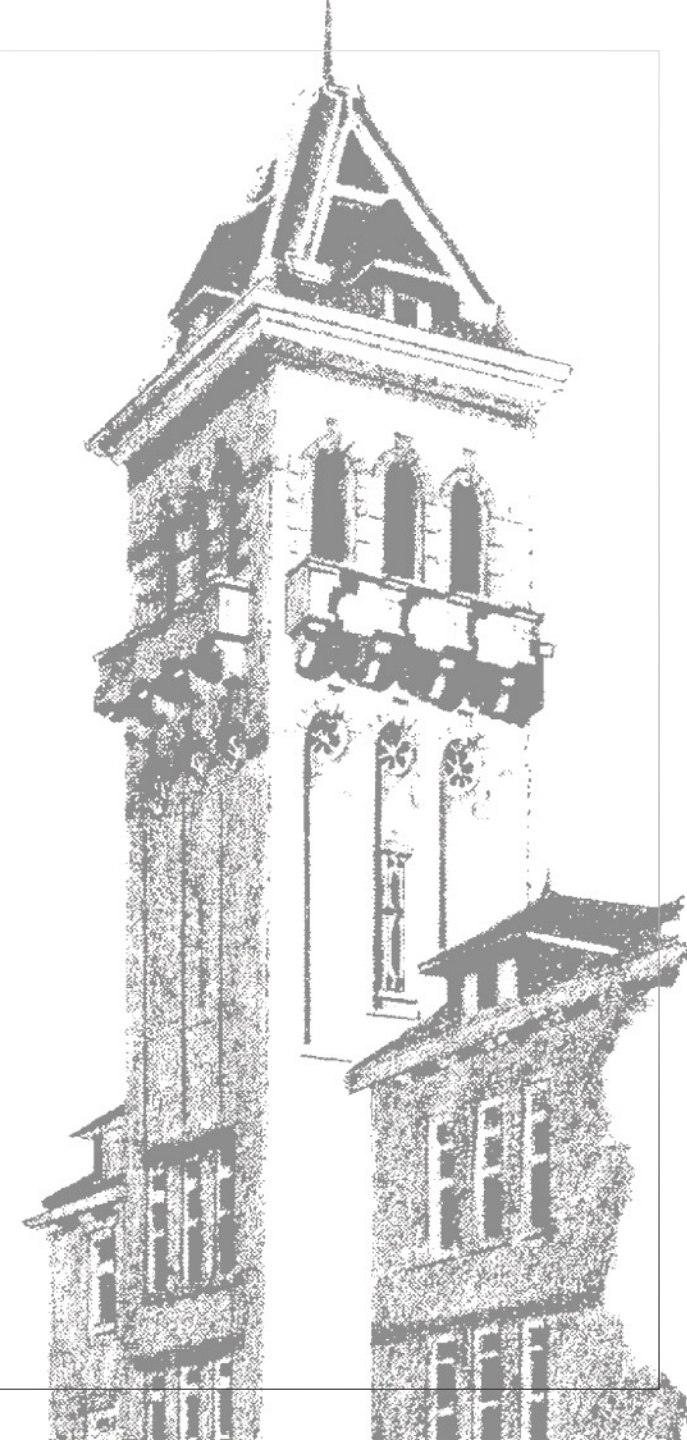
March 24, 2023

**UtahState**University®

# Input on Proposed Changes in 2023-24 Student Tuition and Fees

January 18	February 9	February 14
USU Student Fee Board	USU Student Tuition Board	USUSA Executive Council

March 1	March 3	March 24
“Truth in Tuition and Student Fees” Hearing	USU Board of Trustees	Utah Board of Higher Education



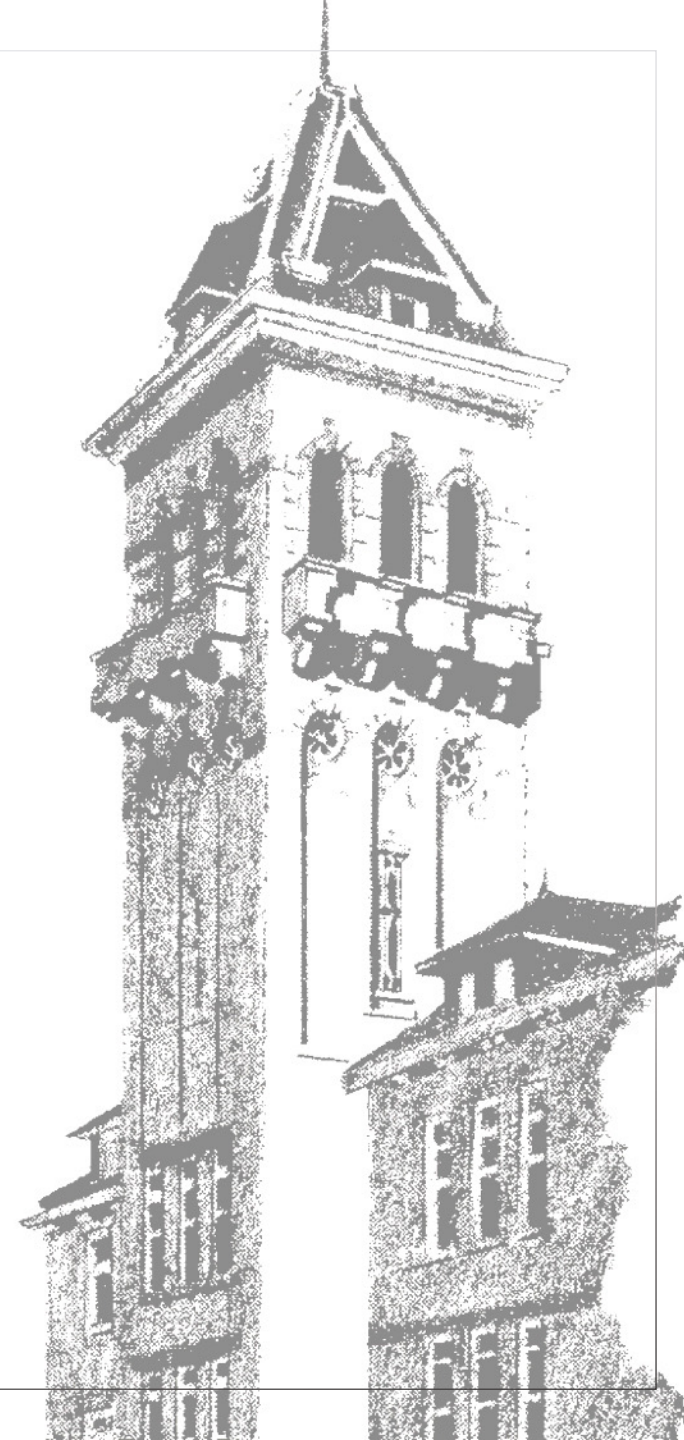
1 CTE credit = 30 hours  
Student Fee: \$0.50 per hour

Tuition: \$2.25 per hour  
Program Fee: varies by program

<b>PROGRAMS</b>	Program Type	Locations	Tech Ed Credits	Membership Hours	Tuition	Student Fee	Program Fee	TECH ED PROGRAM COST	Additional USUE Credits
Accounting Practices**	Certificate	B M USUE	21	630	\$1,417.50	\$ 315.00	\$ 40.00 *	\$1,772.50 *	10
Additive Manufacturing	Certificate	USUE	18	540	1,215.00	270.00	0.00 *	1,485.00 *	0
Apprentice Electrician	Certificate	B M USUE	40	1200	2,700.00	600.00	1,000.00	4,300.00	0
Automated Manufacturing	Certificate	USUE	34	1020	2,295.00	510.00	380.00	3,185.00	0
Automotive Technology	Certificate	M USUE	43	1290	2,902.50	645.00	285.00	3,832.50	0
Bookkeeping**	Certificate	B M USUE	9	270	607.50	135.00	0.00	742.50	7
Certified Nursing Assistant (CNA)**	Certificate	B M USUE	13	390	877.50	195.00	0.00 *	1,072.50 *	3
CNC Machinist	Certificate	USUE	32	960	2,160.00	480.00	150.00	2,790.00	0
Commerical Driver's License (CDL)	Certificate	B USUE	17	510	1,147.50	255.00	2,255.00	3,657.50	0
Construction Technology and Management**	Certificate	B M	27	810	1,822.50	405.00	510.00	2,737.50	3
Construction Technology and Management - Facilities & Maintenance Focus**	Certificate	B M	35	1050	2,362.50	525.00	1,155.00	4,042.50	3
Cosmetology**	Certificate	USUE	81	2430	5,467.50	1,215.00	150.00	6,832.50	3
Diesel Technician	Certificate	USUE	54	1620	3,645.00	810.00	150.00	4,605.00	0
Digital Design**	Certificate	B M USUE	13	390	877.50	195.00	112.00	1,184.50	3
Emergency Medical Technician / First Responders**	Certificate	USUE	13	390	877.50	195.00	87.00	1,159.50	3
Engineering Drafting and Design	Certificate	M USUE	34	1020	2,295.00	510.00	60.00	2,865.00	0
Heavy Equipment Operator	Certificate	B USUE	16	480	1,080.00	240.00	4,150.00	5,470.00	0
Industrial Mechanics**	Certificate	USUE	42	1260	2,835.00	630.00	0.00 *	3,465.00 *	6
Instruments and Controls**	Certificate	USUE	51	1530	3,442.50	765.00	0.00	4,207.50	9
IT Support and Web Development**	Certificate	B M USUE	29	870	1,957.50	435.00	200.00 *	2,592.50 *	3
Medical Assistant**	Certificate	B M USUE	35	1050	2,362.50	525.00	249.00	3,136.50	10
Medical Lab Technician**	AAS	B USUE	41	1230	2,767.50	615.00	0.00	3,382.50	30
Nail Technician**	Certificate	USUE	12	360	810.00	180.00	0.00	990.00	6
Pharmacy Technician**	Certificate	B M USUE	26	780	1,755.00	390.00	500.00	2,645.00	16
Phlebotomy**	Certificate	B M USUE	4	120	270.00	60.00	0.00	330.00	11
Small Business Operations / Entrepreneurism**	Certificate	B M USUE	20	600	1,350.00	300.00	0.00	1,650.00	13
Software Development	Certificate	B M USUE	32	960	2,160.00	480.00	160.00 *	2,800.00 *	0
Surgical Technology**	AAS	B USUE	54	1620	3,645.00	810.00	0.00	4,455.00	14
Web Business	Certificate	B M USUE	17	510	1,147.50	255.00	0.00	1,402.50	0
Welding Technology	Certificate	USUE	32	960	\$2,160.00	\$ 480.00	\$ 210.00 *	\$2,850.00 *	0

# Revised Charges for Technical Education (TE) at USU Blanding, Moab and Eastern

- Technical education programs will be “net neutral” from 2022-2023 to 2023-2024:
  - (++) Tuition increased from \$67.50 per credit to \$95.00 per credit
  - ( + ) Course fees implemented for consumables
  - ( - ) Student fees decreased from \$15.00 per credit to \$3.00 per credit
  - ( -- ) Program fees eliminated
- Overall cost for CDL and Heavy Equipment programs balanced with differential tuition and some course fees

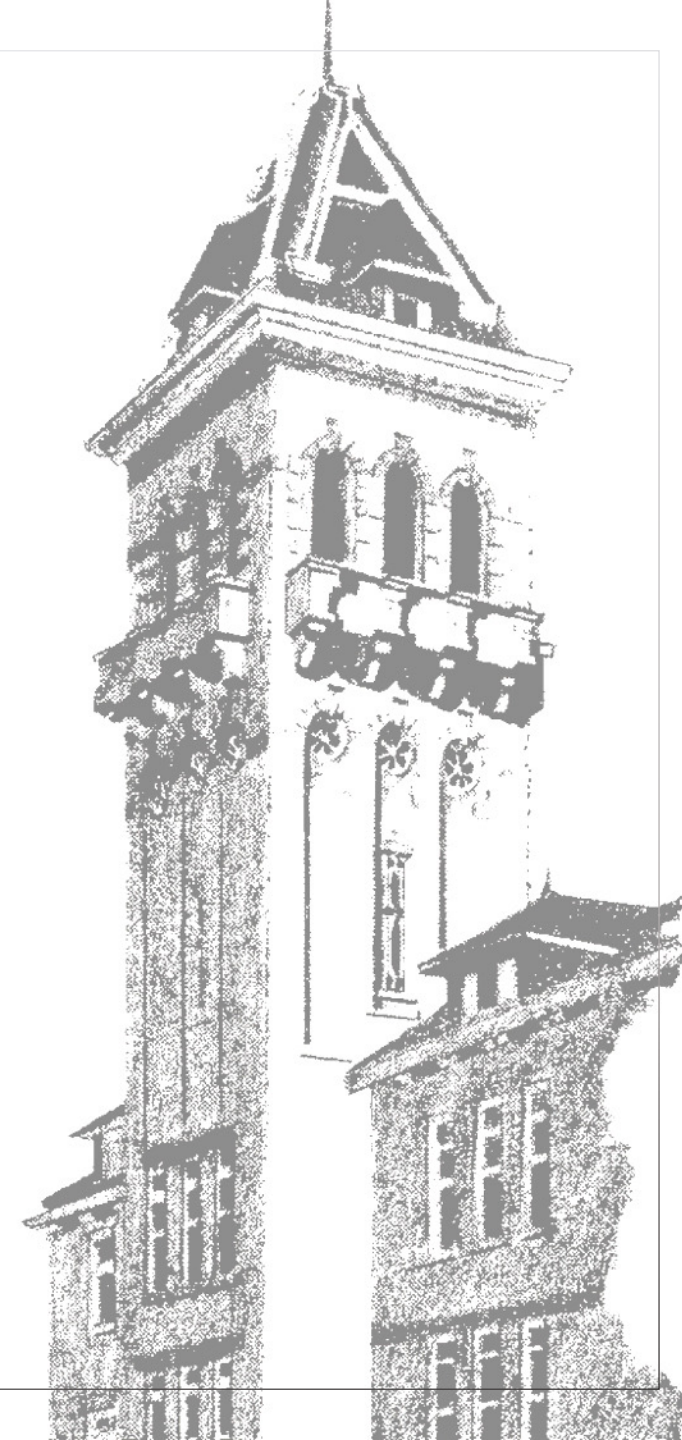


# Summary of 2023-24 Tuition and Student Fees for Technical Education

## Technical Education (TE) courses (semester) on Eastern, Moab, and Blanding Campuses

	2022-23 Tuition	2022-23 Student Fees	Proposed 2023-24 TE Tuition	Proposed 2023-24 TE Student Fees	Change to 2023-24 TE Tuition and Fees*
1 Credit Resident	\$67.50	\$15.00	\$95.00	\$3.00	<b>\$15.50</b>
12 Credits Resident	\$810.00	\$180.00	\$1,140.00	\$36.00	<b>\$186.00</b>
15 Credits Resident	\$1,012.50	\$225.00	\$1,425.00	\$45.00	<b>\$232.50</b>
1 Credit Nonresident	\$67.50	\$15.00	\$95.00	\$3.00	<b>\$15.50</b>
12 Credits Nonresident	\$810.00	\$180.00	\$1,140.00	\$36.00	<b>\$186.00</b>
15 Credits Nonresident	\$1,012.50	\$225.00	\$1,425.00	\$45.00	<b>\$232.50</b>

**\*Overall cost will be neutral: program fees are eliminated, balanced with course fees**



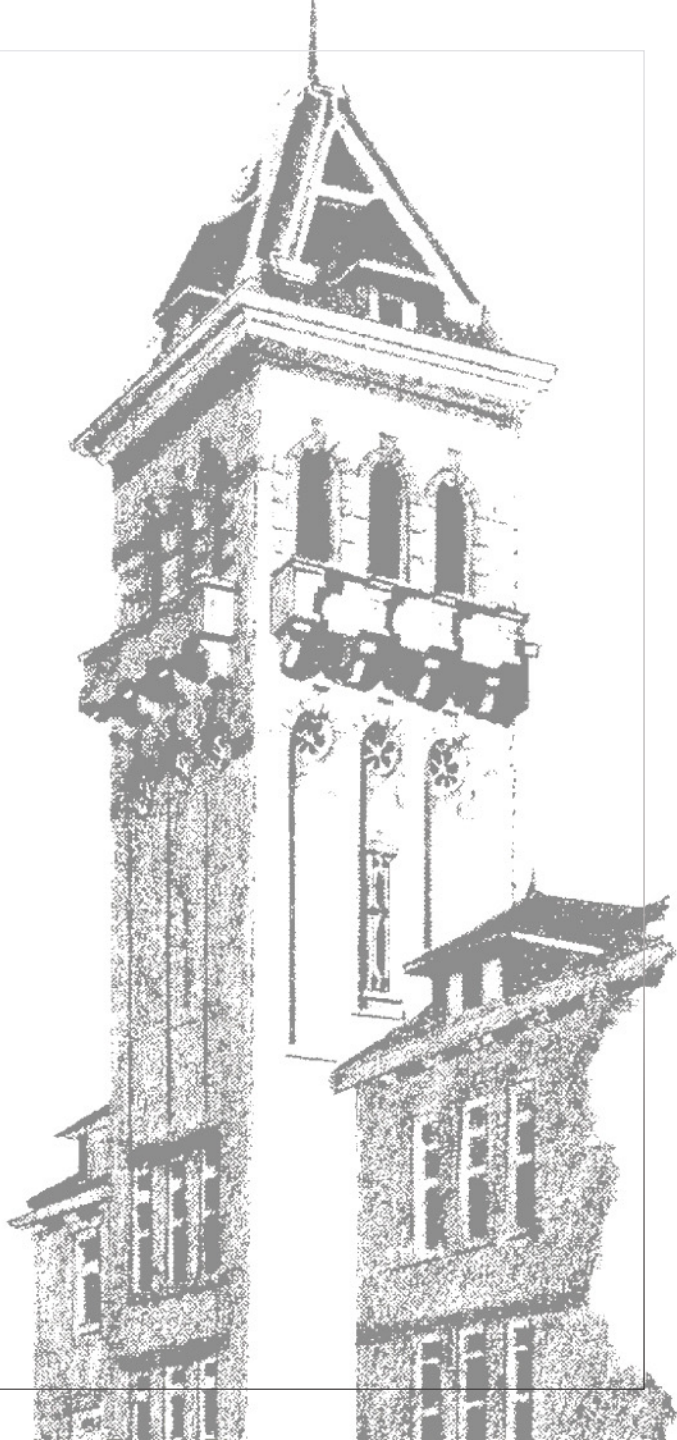


# Example of “net neutral” Technical Education program: CDL

Commercial Driver’s License (CDL) Certificate Program 17 credits		
	2022-2023 Cost	2023-2024 Proposed Cost
Tuition	\$1,147.50	\$1,615.00
Student Fee	\$255.00	\$51.00
Program Fee	\$2,255.00	\$0
Differential Tuition*	\$0	\$1,050.00
Course Fees**	\$0	\$941.00
<b>Total</b>	<b>\$3,657.50</b>	<b>\$3,657.00</b>

\* Differential Tuition of \$175/credit for the six credits of behind-the-wheel training aligned with the other technical education programs in Utah

\*\* Course fees required for the experiential learning components for the additional 11 credits of coursework



# MOTION

I move to approve the tuition rate of \$95 per credit hour for Utah State University – Eastern – Technical Education, along with student fees, and differential tuition rates as presented.

# Snow College 2023-2024 Tuition Recommendation



# Tuition Structure = Contact Hours to Credit Hours

- Tuition is not increasing, but shifting in how it is applied



# Tuition Setting Schedule

- Student Leadership Review
  - President's Cabinet Review
  - Truth-in-Tuition Hearing
  - Board of Trustees Meeting
- February 27, 2023
  - March 2, 2023
  - March 13, 2023
  - March 17, 2023

# Truth-in-Tuition Notification



## NOTICE OF TUITION HEARING

**Monday, March 13, 1:30pm**

Founders Hall and Richfield Board Room

- No increase in tuition or fees

- Standardizing technical education - \$85/credit, \$10 fee/credit

- Reducing early college online - \$75/credit

# 2023-2024 Tuition and Fee Rates

	2022-23	2023-24
Resident	\$2,090	\$2,090
Non-Resident	\$7,065	\$7,065
WUE	\$3,039	\$3,039
Tech Ed	\$2 per contact hr plus \$0.25 fee	\$85 per credit plus ~\$10 fee

# Questions?



# MOTION

I move to approve the tuition rate of \$85 per credit hour for Snow College - Technical Education, along with student fees as presented.

SALT LAKE COMMUNITY COLLEGE

# Salt Lake Technical College Tuition Approval Presentation March 24, 2023

President Deneece G. Huftalin, PhD



# 2023 SLCC Tuition and Fee Meetings

- General Student Fee Advisory Board Meeting: January 27
- Cabinet Budget Meetings: January 27 and February 9
- Truth in Tuition/Student Hearing: March 2
- Board of Trustee Meeting: March 15
- Utah Board of Higher Education Approval: March 24

# SALT LAKE TECHNICAL COLLEGE TUITION SETTING PROCESS

SALT LAKE COMMUNITY COLLEGE

The Utah System of Higher Education instructed all Technical Colleges to move to a NEW Technical Credit Model:

- Move from a \$2.45 clock hour rate to a \$90 Tech Credit Hour Rate
- Cost neutral for students and aligns with USHE Tech Colleges

SLTC Credit Hour Rate	Student Fee Per Credit Hour	Student Cost Impact
\$90.00	\$8.00	No Change

Tech College	Credit Hour Rate	Student Fee Per Credit Hour
Mountainland Tech	\$120.00	\$0.00
Davis Tech	\$95.00	\$0.00
Ogden-Weber Tech	\$95.00	\$0.00

Old Model: 900 clock hours cost \$2,200; New Model: 24 Tech Credits cost \$2,160

# 2023-24 DIFFERENTIAL TUITION

SALT LAKE COMMUNITY COLLEGE

## SLTC Professional Truck Driving Program

The College proposes differential tuition of \$100 per credit hour:

- Differential Tuition Revenue projected: \$60,000
- Helps cover rising Diesel fuel and other program costs
- Excess revenue may be used to help cover the cost of a full-time CDL faculty
- Course fees will be monitored and possibly lowered

SALT LAKE COMMUNITY COLLEGE

Questions?



# MOTION

I move to approve the tuition rate of \$90 per credit hour for Salt Lake Community College – Technical Education, along with student fees, and differential tuition rates as presented.

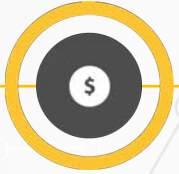


**BRIDGERLAND**  
TECHNICAL COLLEGE



# BTECH TECHNICAL COLLEGE TUITION ALIGNMENT

## CLOCK-HOUR TO CREDIT-HOUR CONVERSION



\$95.00

Credit  
Hour

- Complete restructure of tuition
- Revenue neutral in all material respects
- No differential tuition



### TUITION HEARING

November 29, 2022

### BOARD OF TRUSTEES APPROVAL

December 5, 2022





**BRIDGERLAND**  
TECHNICAL COLLEGE

# MOTION

I move to approve the tuition rate of \$95 per credit hour for Bridgerland Technical College.

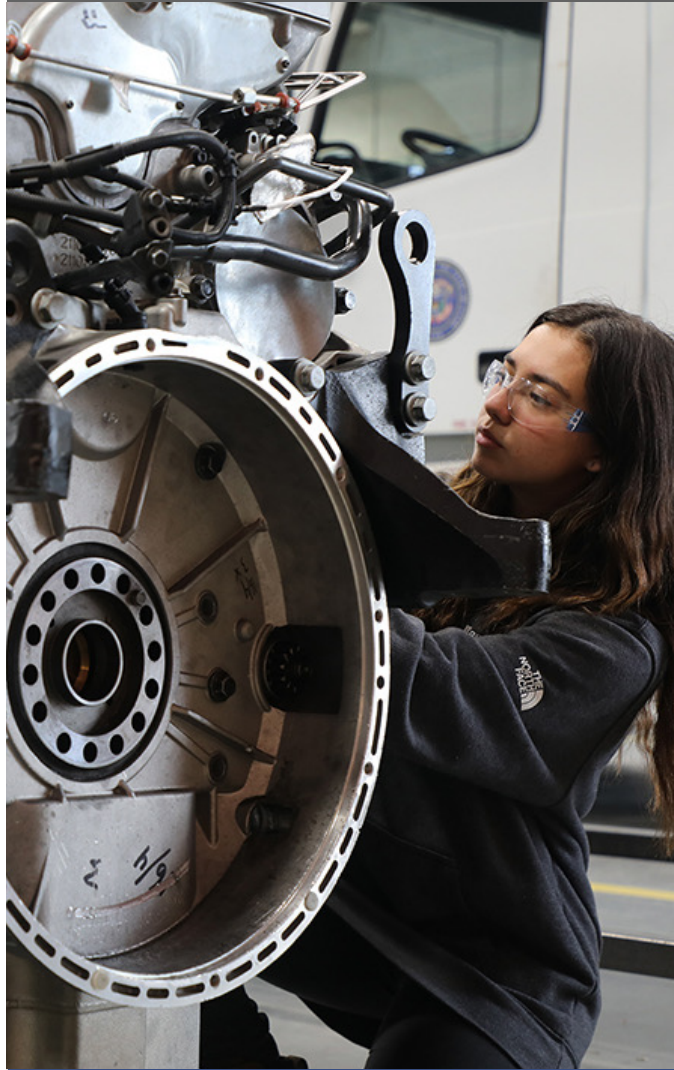


**DAVISTECH**  
DAVIS TECHNICAL COLLEGE

# Tuition Authorization Request Utah Board of Higher Education

President Darin Brush  
24 March 2023

# TUITION SETTING



## Tuition Disclosures and Consultation (USHE Policy R511)

- 31 October 2022: Student notification
- 9 November 2022: Tuition and Fees Committee (students and staff) review
- 14 November 2022:
  - President's Council review
  - Truth in Tuition hearing
- 1 December 2022: College Board of Trustees approval
- 24 March 2023: Presentation to the Utah Board of Higher Education



# TUITION PROPOSAL

## Transition to Credit: Credit Hour Tuition Approval

- **Set rate at \$95 per credit hour**
- Eliminate all general fees
- Eliminate course fees in most (26) programs
- Cost neutral across the student body



# DIFFERENTIAL TUITION

## Authorization to Charge Differential Tuition

(USHE Policy R510.8.3)

- Davis Tech has engaged with industry and Talent Ready Utah to add a high yield, Commercial Driver License program (aligned with other colleges)
- College Board of Trustees approved the program on 16 March 2023
- Talent Ready Utah start-up grant application is due 15 April 2023
- Range of differential tuition rates at other seven institutions is \$100 to 390 per credit hour
- **Proposed differential tuition rate is \$200 per credit hour**





**DAVISTECH**

DAVIS TECHNICAL COLLEGE

Thank you



# MOTION

I move to approve the tuition rate of \$95 per credit hour for Davis Technical College, along with differential tuition rates as presented.



# Tuition Rate - \$105/ per credit hour

*\*CDL - \$305 (Differential Tuition)*

- Student fees reduced
- Additional tuition revenue to offset fee reduction
- Revenue neutral



# MOTION

I move to approve the tuition rate of \$105 per credit hour for Dixie Technical College, along with differential tuition rates as presented.

# Mountainland Technical College Tuition Proposal

March 24, 2023



# Tuition and Credit Alignment

- MTECH will begin to award credit in FY2024. This change requires that tuition be charged by the credit and not the enrolled hour.
- MTECH has also converted to course based offerings. This change allows for a student to pay one course at a time as they move through their program rather than paying all at once.
- The intent is for the changes to be revenue neutral.

# Proposed Tuition

Current Tuition Rate: \$2.10 per membership hour

Proposed Tuition Rate: \$120 per credit hour FY2023

FY2023 Projected Tuition Revenue with proposed tuition rate: \$3,647,400

FY2023 Projected Tuition Revenue Increase: \$1,411,600

FY2023 Projected Fee Reductions: \$1,649,300



# MOTION

I move to approve the tuition rate of \$120 per credit hour for Mountainland Technical College.



**OGDEN-WEBER**  
TECHNICAL COLLEGE

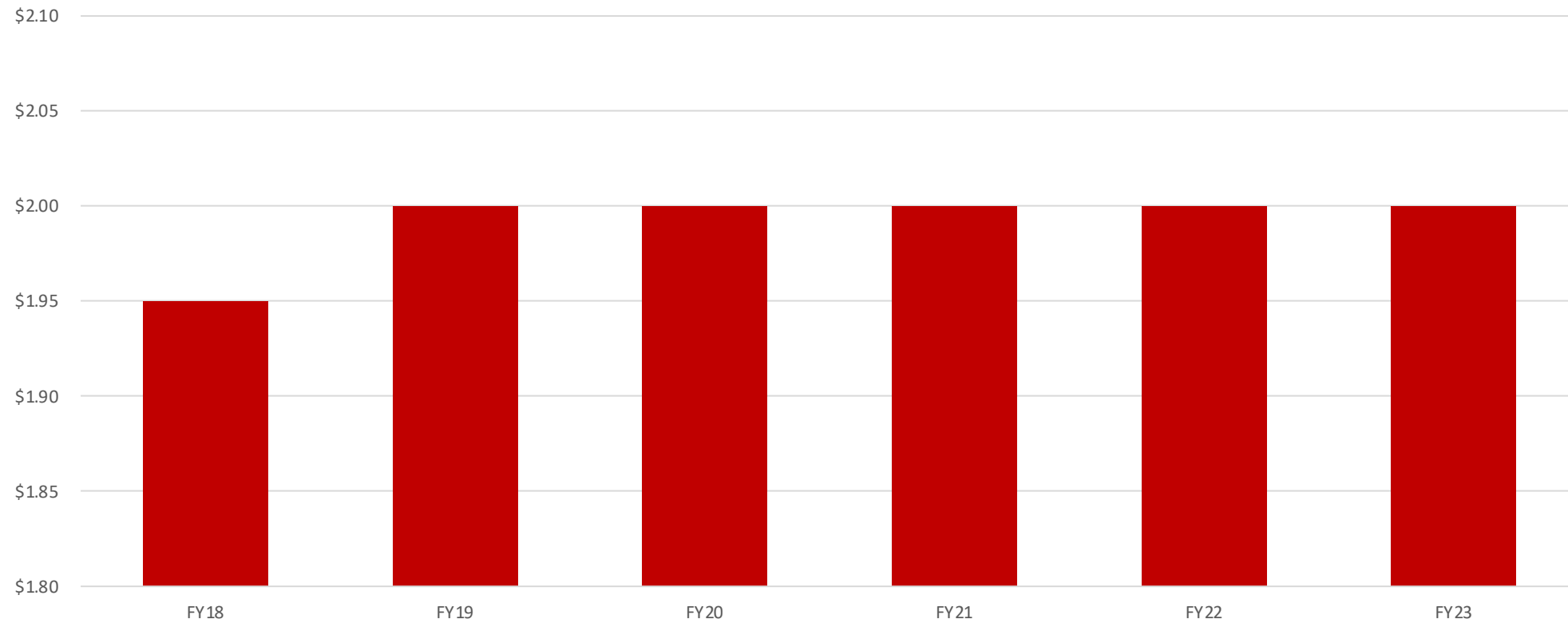
**FY24 TUITION**  
**CLOCK HOUR TO CREDIT HOUR**

Utah Board of Higher Education  
March 24, 2023

*TECHNICALLY, WE RUN THE WORLD*



# Tuition Rates 2018–2023





# Clock to Credit Conversion Priorities

- Keep costs low for students
- Eliminate general fees
- Continue charging no course fees
- Align with similar Utah System of Higher Education technical colleges

FY 2022 Tuition and Fees

**\$3,214,003**

---

FY 2022 Hours Converted to Credits

**34,304**

30 classroom clock hours = 1 credit  
45 externship clock hours = 1 credit

**= \$93.69 =**

Rounded to

**\$95**

per Credit  
Hour

# Timeline

**January 24, 2023** – Student and Trustee Tuition Committee Meeting

**January 26, 2023** – President's Cabinet Approval

**February 16, 2023** – Truth in Tuition Hearing

**February 23, 2023** – OTECH Board of Trustees

**March 24, 2023** – Utah Board of Higher Education

# MOTION

I move to approve the tuition rate of \$95 per credit hour for Odgen-Weber Technical College.



# Tooele Technical College

Utah Board of Higher Education  
Board Meeting  
March 24, 2023





# Tuition Reset

*\*Estimated to be Revenue Neutral*

## Important Milestones



Truth in Tuition Hearings – Dec. 13<sup>th</sup>, 2022



Board of Trustees Approval – Jan. 11<sup>th</sup>, 2023

## Credit Tuition Amount

\$85.00/Credit Hour

## Differential Tuition

CDL Programs - \$390/Credit Hour



# MOTION

I move to approve the tuition rate of \$85 per credit hour for Tooele Technical College, along with differential tuition rates as presented.



# UBTech Tuition Approval



*Utah System of Higher Education – Truth in Tuition*

# ▶ Credit Hours

## Why the change in tuition?

-Not a tuition increase or decrease, but a change in currency.

Clock  
Hours



Credit  
Hours



# ▶▶ Timeline



January 18, 2023 - UBTech Trustee Meeting

January 31, 2023 - UBTech Fee Committee

February 23, 2023 - Truth in Tuition Hearing

March 8, 2023 - Fiscal Committee Review

March 15, 2023 - UBTech Board of Trustees

March 24, 2023 - USHE Board of Directors



# ▶ NOTICE OF HEARING



## NOTICE OF HEARING ON UINTAH BASIN TECHNICAL COLLEGE (UBTECH) COLLEGE TUITION

UBTech anticipates transitioning\* its academic currency from clock hours to credit hours for its academic programs starting July 1, 2023.

UBTech is anticipating an increase in tuition of 8.7% (\$8.00 per credit)

The tuition increase has been offset with an overall reduction in programmatic fees to ensure college revenue and total cost for students will not substantively change.

.....

All concerned students and citizens are invited to a public hearing on the proposed increase to be held:

Thursday, February 23, 2023, at Noon  
in the UBTech Board Room (T18), 1100 E. Lagoon Street, Roosevelt, UT 84066

Zoom meeting link:

<https://us06web.zoom.us/j/84959901626?pwd=NC94bUVCWmRhVlErbkgyVDVzV3VzUT09>

Meeting ID: 84959901626  
Passcode: 886608

\*Pending COE Approval



# ▶ Cost



**\$100 p/credit**

# ▶ Differential Tuition

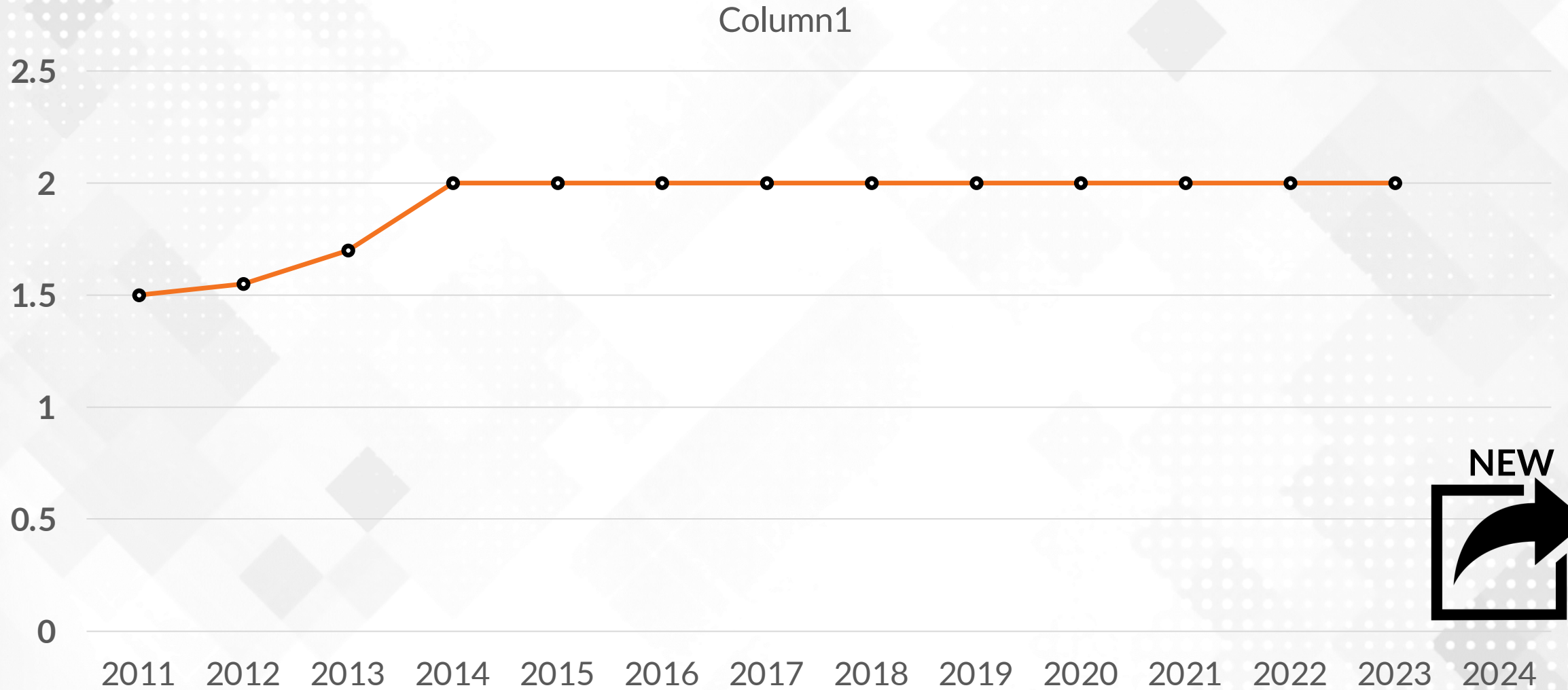
## CDL and Well Control

Program	Credit Hours	Tuition p/hour	Tuition Total	Differential Tuition p/hour	Differential Tuition	Total
CDL	7	\$100 p/hour	<b>\$700</b>	\$350 p/hour	<b>\$2,450</b>	<b>\$3,150</b>
Well Control	1	\$100 p/hour	<b>\$100</b>	\$785 p/hour	<b>\$785</b>	<b>\$885</b>

### R510.8.3

*Differential Tuition -*  
The Board may authorize differential tuition schedules for programs on a case-by-case basis.

# ▶▶ Tuition History



# Thank You

Any Questions?





# MOTION

I move to approve the tuition rate of \$100 per credit hour for Uintah Basin Technical College, along with differential tuition rates as presented.

# New Performance Funding Model Overview

March 24, 2023



# Select Definitions

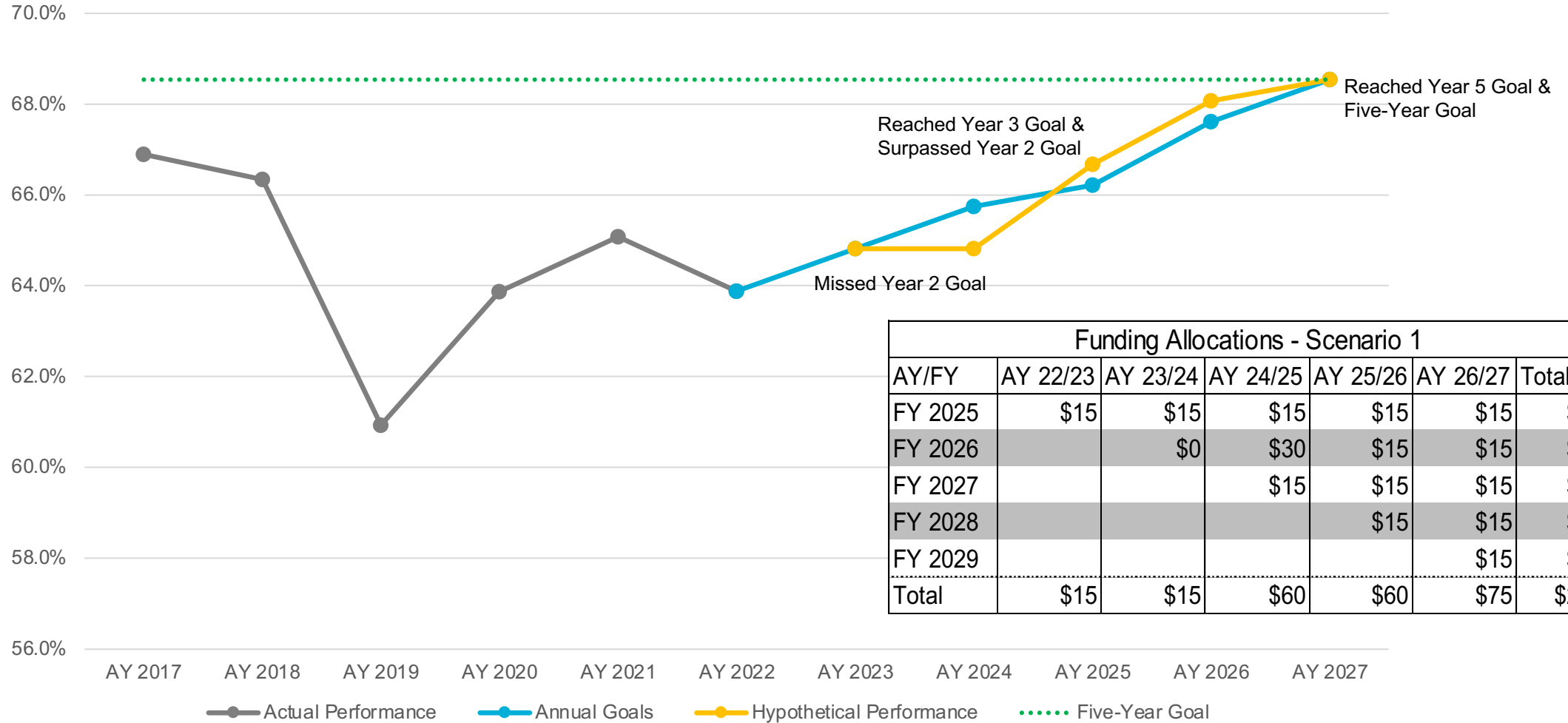
- **“Five-year Performance Period”** is defined by Utah Code section 53B-7-709(1)(d) and means the five-year period beginning on July 1, 2022, and ending on June 30, 2027.
- **“Five-year Performance Goals”** means the performance metric goals adopted by the Board of Higher Education for each institution and the system of higher education, measured as the difference between the desired metric value at the end of the five-year performance period and beginning of the five-year performance period.
- **“Annual Performance Goals”** means the performance metric goals adopted annually by the Board of Higher Education for each institution and the system of higher education, measured as the difference between the desired metric value for the year and the previous year value.

# Goal Setting & Funding Provisions

- Annual performance goals must be greater than or equal to zero.
- Annual performance goals must be sufficiently rigorous to achieve five-year performance goals.
- Annual performance funding will be awarded in full if annual goals are met or exceeded. Performance funding will be awarded on a prorated basis if actual performance is less than the goal but greater than zero. If the annual performance goal is missed, and actual performance is less than or equal to zero, annual performance funding will be withheld.
- If actual performance meets or exceeds the five-year performance goal in the last year of the performance period, annual performance funding will be awarded in full.
- If an annual goal is missed, performance funding can be ‘made-up’ within the 5-year performance window on an ongoing basis if the institution meets or exceeds its previous year’s annual performance goal and meets or exceeds the performance goal that the institution previously failed to meet. Any unallocated portion of full new performance funding will be reallocated to institutions at the end of the five-year performance period pursuant to Utah Code § 53B-7-706(5)(a)(iii).

# Proposed Funding Model – Scenario 1

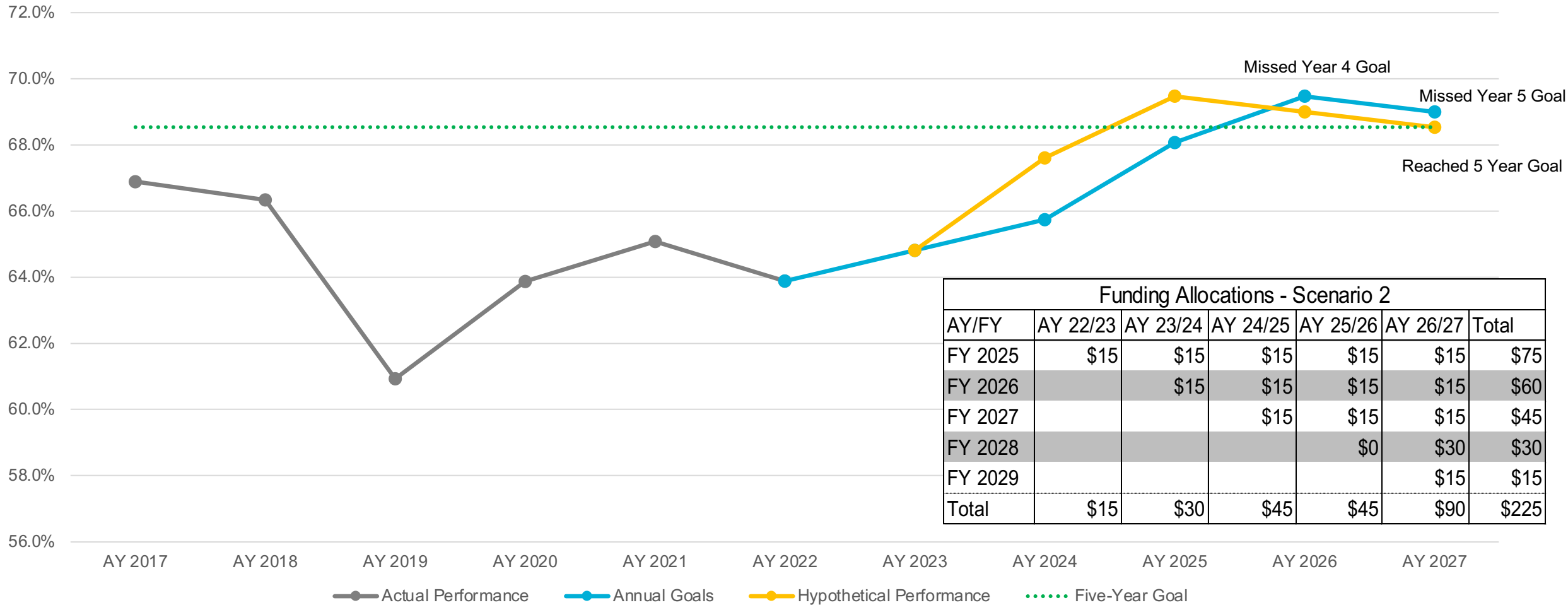
**Annual Performance Goals Hypothetical - Access**  
 \$45 Million of Annual Appropriations w/\$15 Million Allocated for Access



AY/FY	AY 22/23	AY 23/24	AY 24/25	AY 25/26	AY 26/27	Total
FY 2025	\$15	\$15	\$15	\$15	\$15	\$75
FY 2026		\$0	\$30	\$15	\$15	\$60
FY 2027			\$15	\$15	\$15	\$45
FY 2028				\$15	\$15	\$30
FY 2029					\$15	\$15
<b>Total</b>	<b>\$15</b>	<b>\$15</b>	<b>\$60</b>	<b>\$60</b>	<b>\$75</b>	<b>\$225</b>

# Proposed Funding Model – Scenario 2

Annual Performance Goals Hypothetical - Access  
 \$45 Million of Annual Appropriations w/\$15 Million Allocated for Access



# Current High-Yield Approach Example

- Institution X in 2022:
  - 4,500 graduates in high-yield cohort
  - 3,600 received high-yield awards
  - High-yield metric is  $3,600/4,500 = 80\%$
- Institution X has 5-year goal for HY of 3%
  - 2027 high-yield goal is 83%
- Over the prior 4 years, Institution X's HY graduate cohort grew by 4% (CAGR)
- Assume Institution X's HY cohort continues to grow at that rate
  - 2027 cohort size = 5,475
  - 2027 high-yield graduates needed =  $5,475 * 0.83 = 4,544$  (944 more than 2022 level)

# Alternative High-Yield Approach

- Premise: devise a measure that holds institutions harmless for growth in graduates of non-HY awards while still holding true to statute
- In each year after 2022, calculate HY metric as follows
  - Ignore any increases in non-HY graduates
  - Any change (growth or decline) in non-HY graduates has no effect on the HY metric
  - Increases in HY graduate count increase both the numerator and denominator of HY metric
  - Only growth in HY graduates affects the HY Metric



# Alternative High-Yield Approach

$$\frac{A + x}{B + x} = \textit{goal}$$

Where

$A$  = Base year high-yield graduates

$B$  = Base year graduate cohort

$x$  = Additional high-yield graduates needed to reach goal

# Alternative High-Yield Approach Example

- Institution X, 5-year goal:
  - 4,500 graduates in high-yield cohort in 2022
  - 3,600 received high-yield graduates in 2022
  - High-yield metric is  $3,600/4,500 = 80\%$
  - 4,544 high-yield graduates needed in 2027 to achieve 83% (+944)
- Institution X, 5-year goal under alternative approach:
  - $\frac{3,600+x}{4,500+x} = .83 \rightarrow x = +794$
  - 4,394 high-yield graduates needed in 2027 to achieve 83%

# Nominal Increase Needed to Meet 5-Year Goals

	Current Model (estimate*)	Proposed Model
Bridgerland Tech	253	158
Davis Tech	263	237
Dixie Tech	270	175
Mountainland Tech	427	281
Ogden-Weber Tech	207	159
SLCC	541	112
Snow	391	212
Southwest Tech	48	62

	Current Model (estimate*)	Proposed Model
SUU	894	251
Tooele Tech	98	48
Uintah Basin Tech	166	100
USU	770	898
UT	619	336
UU	525	-
UVU	3573	1159
WSU	930	787

\*Estimates calculated using 4-year CAGR for each institution's total awards, with the exception of Dixie Tech, Snow College, Tooele Tech and UVU.

# MOTION

I move to adopt Policy R522, *Annual Performance Goal Setting and Funding Determination*.

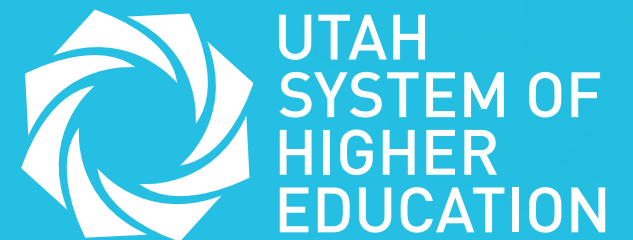
# MOTION

I move to adopt FY 2025 systemwide and institutional annual performance goals consistent with proposed Board policy R522.



# Simplify Admissions

March 24, 2023



# THE NEED FOR AN RFP

# Summary of Concepts Discussed by Taskforce

The Simplified Admissions Taskforce considered:

1. The philosophy behind **one common admissions application for all 16 USHE institutions** and its process.
2. The **engagement of a strategic enrollment management consultant** to support in determining the scope of the common application and process.
3. The idea of making the common application a **free application** and exploring financial options to make this possible.
4. How to **intentionally engage key constituent groups and underrepresented populations** to inform the user experience of the common application.



# Overview of Institutional Concerns

1. **Workload:** With the implementation of a common application, additional staff will be required to handle the recruitment of prospective students and the processing of an increased number of applications.
2. **Yield:** With the ability for students to submit applications to multiple institutions through a common application, institutional admission and enrollment yields will be negatively affected.
3. **Budget Impact:** By offering a free admissions application, institutions will lose revenue generated from application fees.
4. **Security:** By offering a free, common application, fraudulent applications could increase, potentially resulting in the wrongful disbursement of financial aid.
5. **Ease of Use:** A common application for all institutions could make technical colleges' current admissions processes more complicated.

**WHAT WAS IN THE RFP?**

# Scope of Work

“The Utah Board of Higher Education is seeking **consultation for a single admission application solution** to 16 higher education institutions in the state. The goal of the project is to **unify the college application process**...It is envisioned that the single application will be made available to all Utah high school students through an access portal yet to be developed...The Utah Board of Higher Education has identified a **strategic initiative to increase the number and percentage of Utah high school graduates** enrolling in the USHE...It is estimated that between 60,000 - 70,000 applications will be processed annually through the single admissions application.”

# Evaluated Criteria

## Demonstrated Understanding of Changes to Institutional Processes

1. Workload
2. Yield
3. Budget Impact
4. Security
5. Ease of Use and Flexibility

## Demonstrated Ability to Develop Scope and Cost Analysis of Application

1. Engagement of Key Constituent Groups
2. Audience of Focus
3. CIS Integration
4. Application Availability
5. Implementation Timeline

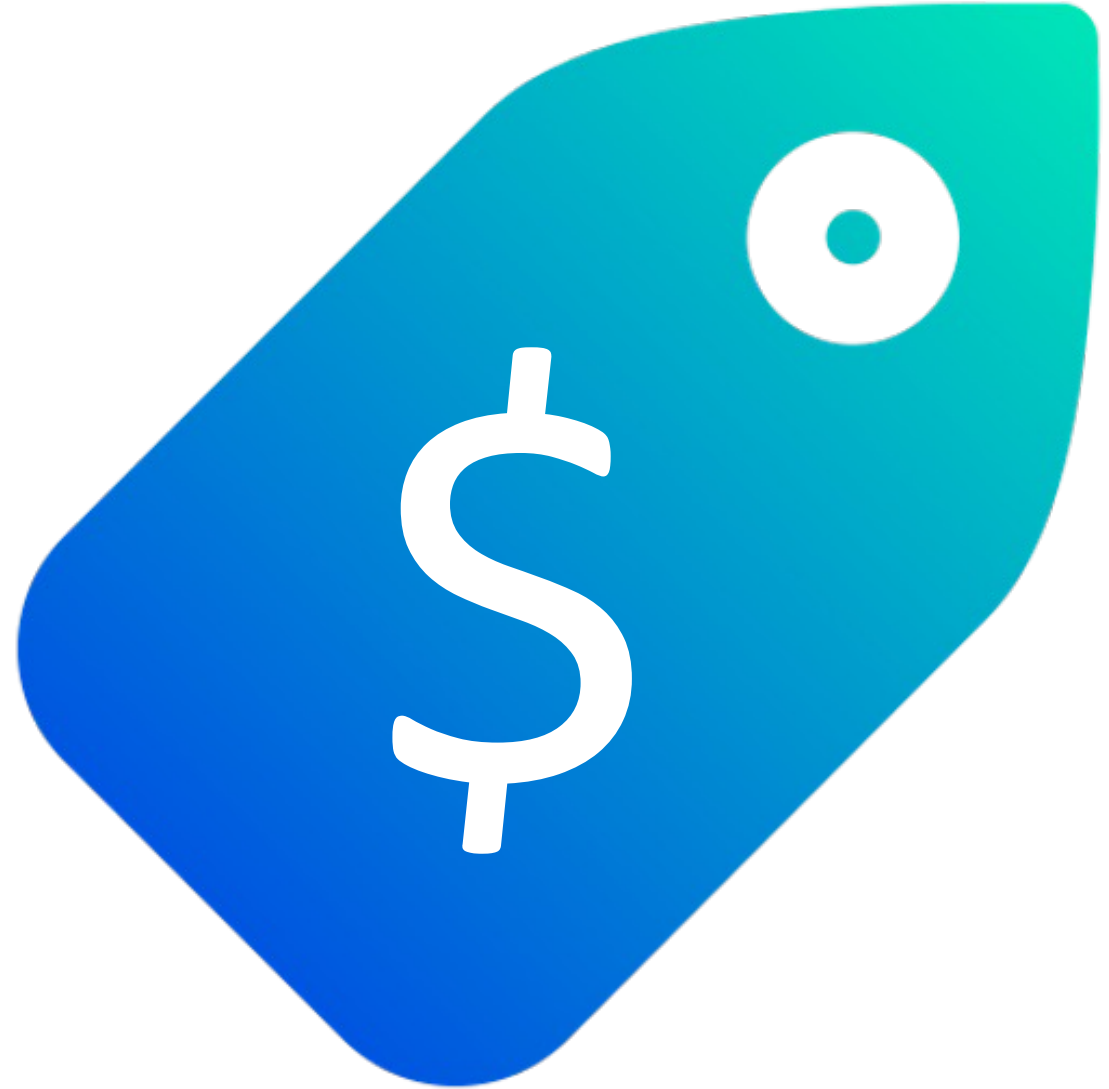
# Vendor Submission

- Eigen X
- Huron



# Cost

- Not to exceed \$300,000
  - Includes consulting fee, operating expenses, market research, and deliverables





## Next Steps

- **June 2023:** Report initial work and findings to Board of Higher Education
- **September 2023:** Final report to the Board of Higher Education.
- **2024 legislative session:** Anticipate a prioritized legislative request for a common college application.

# MOTION

I move to approve the expenditure of funds not to exceed \$300,000 for consultation on the scoping and development of a USHE-shared single admission application.



# MOTION

I move to approve the Consent Calendar.

# FJ Management Promise Partner Scholarship

Crystal Call Maggelet  
CEO/Chairman of the Board  
FJ Management Inc.

# Overview

- ❖ Began scholarship programs with colleges and universities across Utah in 2011
  - Asked for preference to be given to our employees and their children, but could not be guaranteed
  
- ❖ Joined the Utah System of Higher Education (USHE) in 2019
  
- ❖ Learned about the Utah Promise Scholarship through USHE
  
- ❖ Partnered with USHE to match the states funding up to \$100,000 to provide scholarships covering tuition and fees for our Utah Maverik employees
  
- ❖ Implemented the FJM Promise Partner Program in Summer of 2022

# Criteria for FJM Promise Partner Scholarship

- ❖ Be a Maverik Employee
  - Utah Resident
- ❖ Complete the FAFSA
  - EFC less than \$10,000
- ❖ Enroll in a College or University
- ❖ Maintain 3.0+ GPA
- ❖ Choose a Major with a Graduating Salary of \$40,000
- ❖ Submit Grades to USHE at the end of Each Semester
- ❖ Mentor Program and Scholarship Events available for recipients

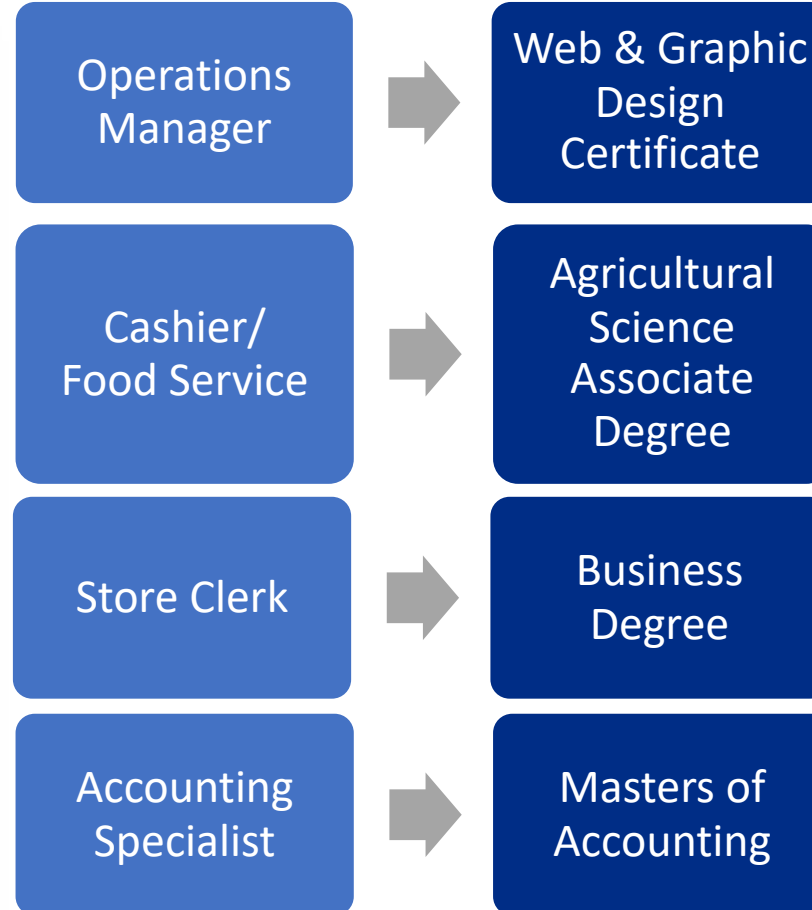


# Highlights and Impact

- ❖ FJM 2022 Contribution: \$85,000
- ❖ Awards for 2022-2023: 19
  - Number that Applied: 32
- ❖ First Generation Students: 12 (63%)
- ❖ Average Awardee EFC: \$4,417
- ❖ Median Awardee EFC: \$3,351



# Career Paths



Questions?

# How Affordable are USHE Institutions?

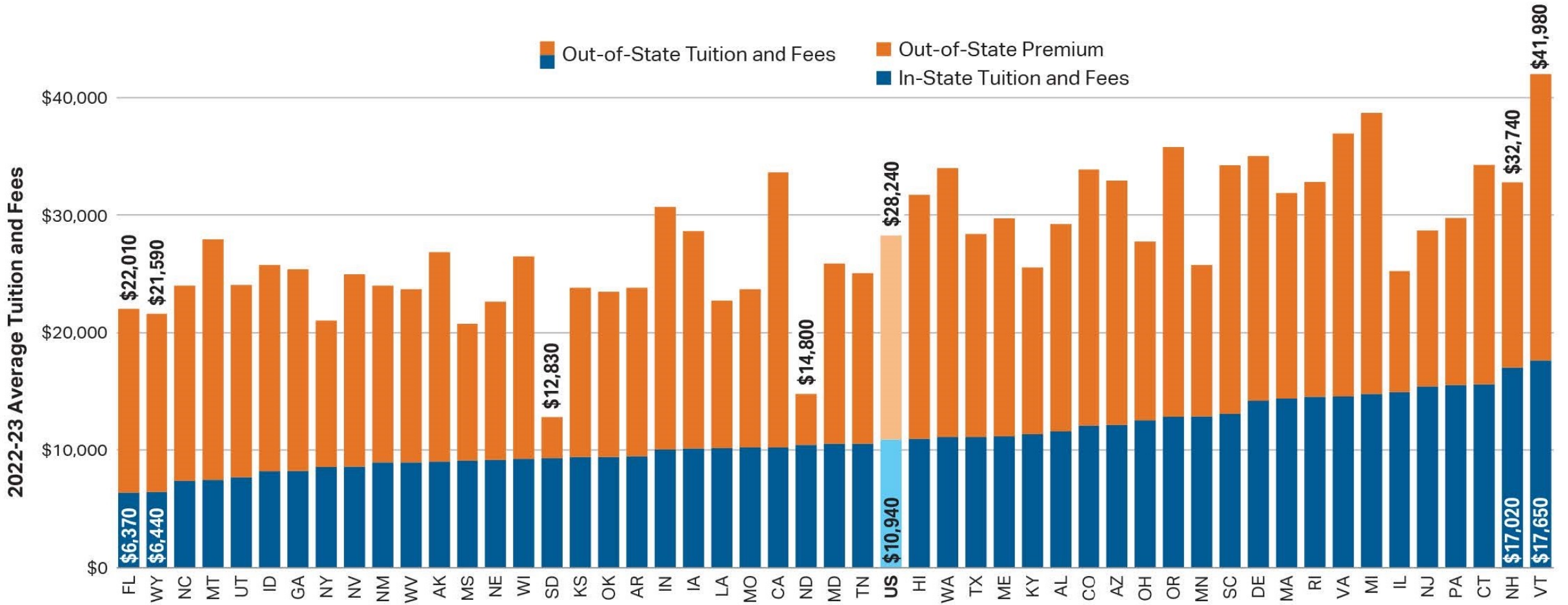
March 24, 2023



UTAH  
SYSTEM OF  
HIGHER  
EDUCATION

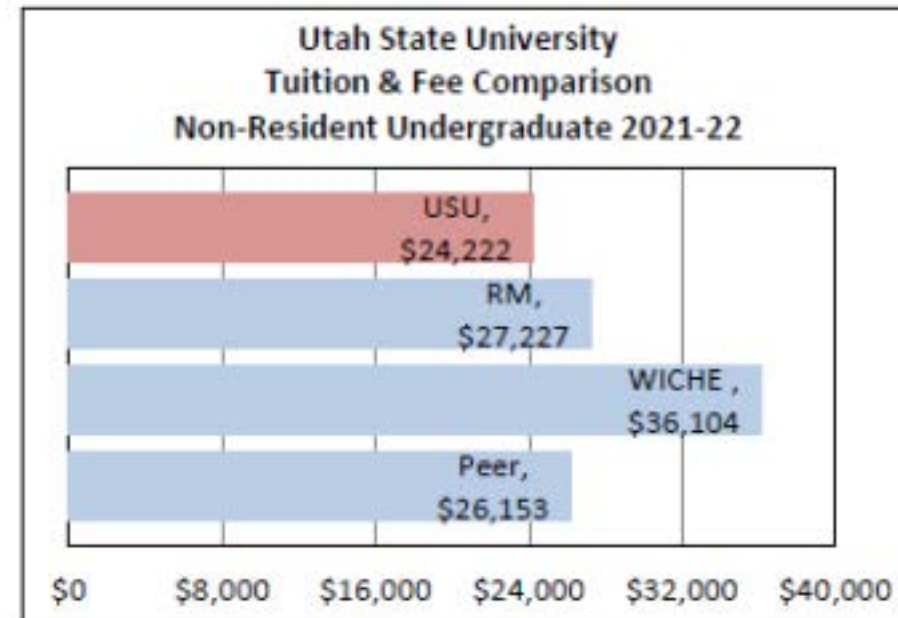
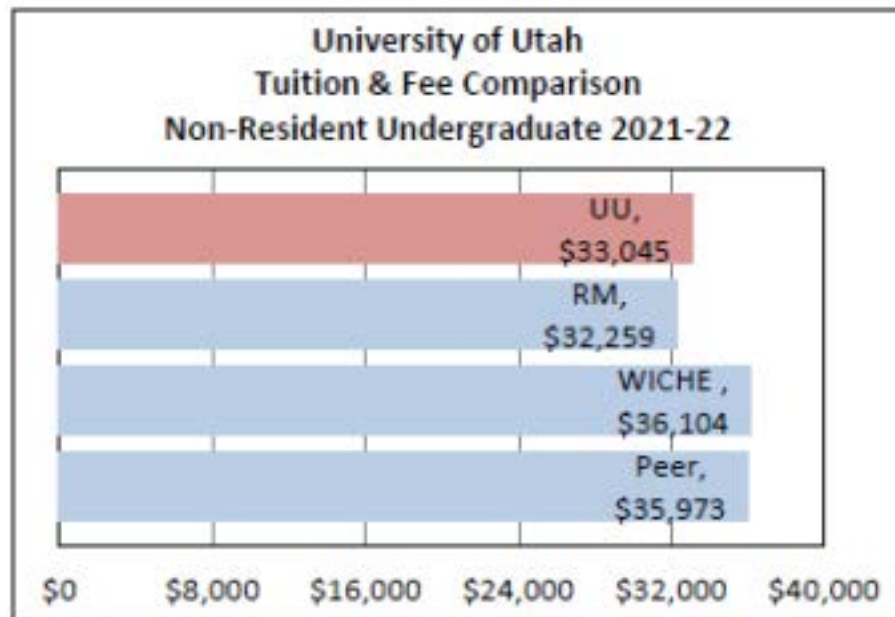
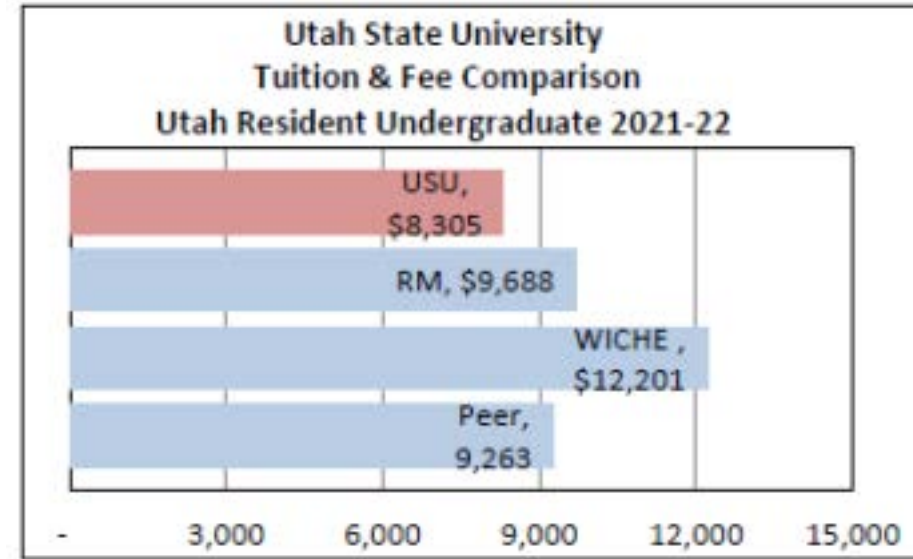
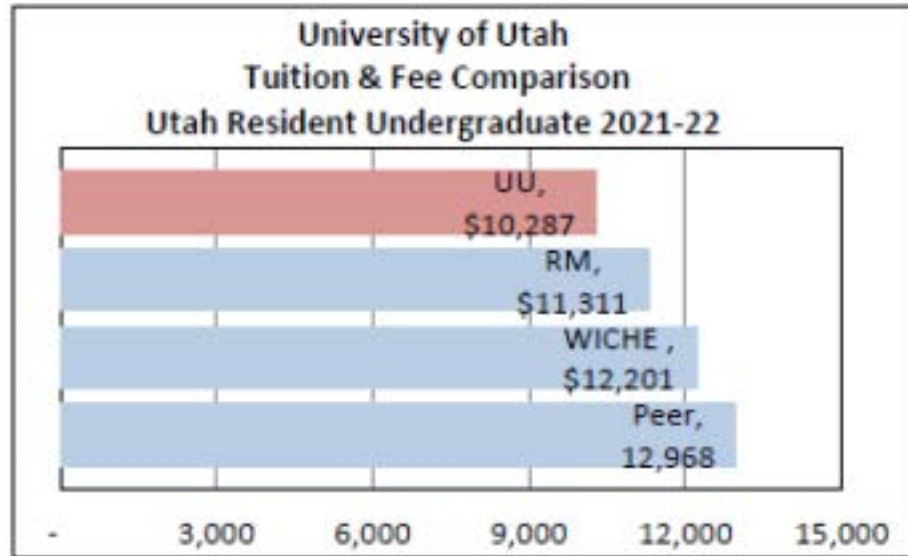


# National Average 2022-23 Tuition & Fees at Public Four-Year Institutions

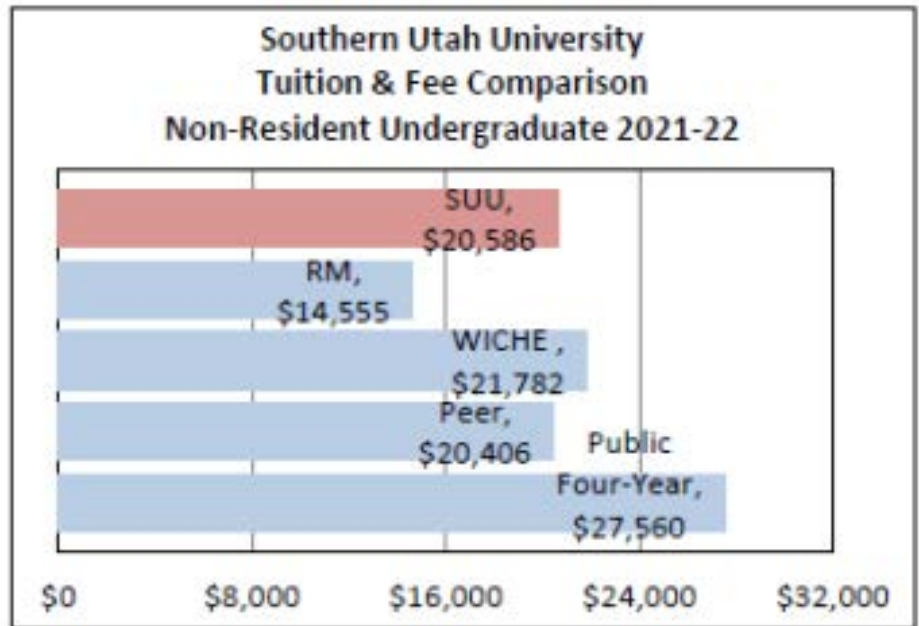
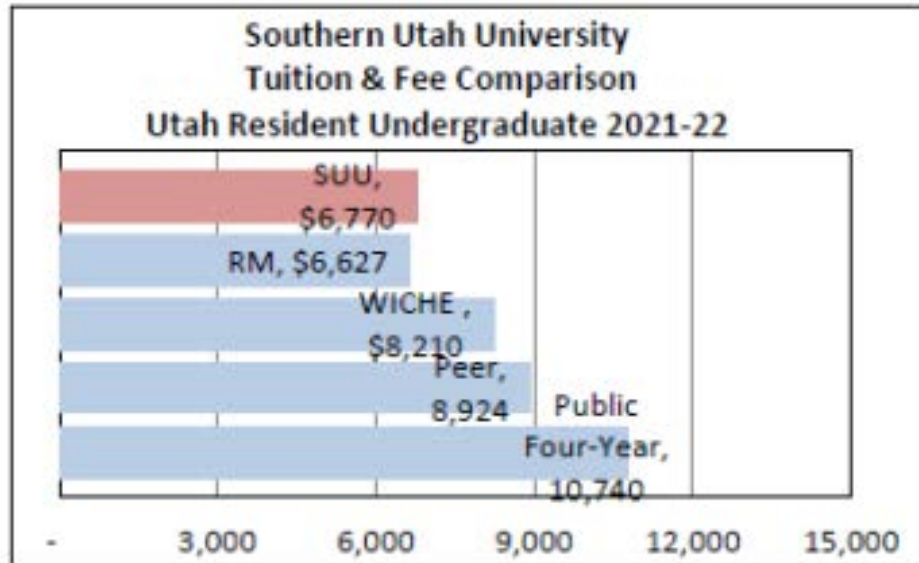
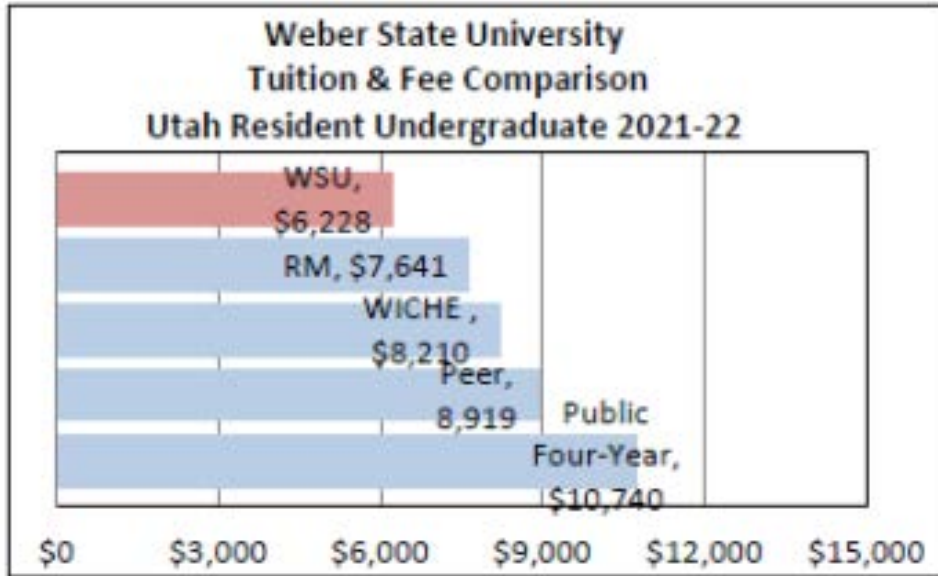


Source: Trends in College Pricing and Student Aid 2022, CollegeBoard

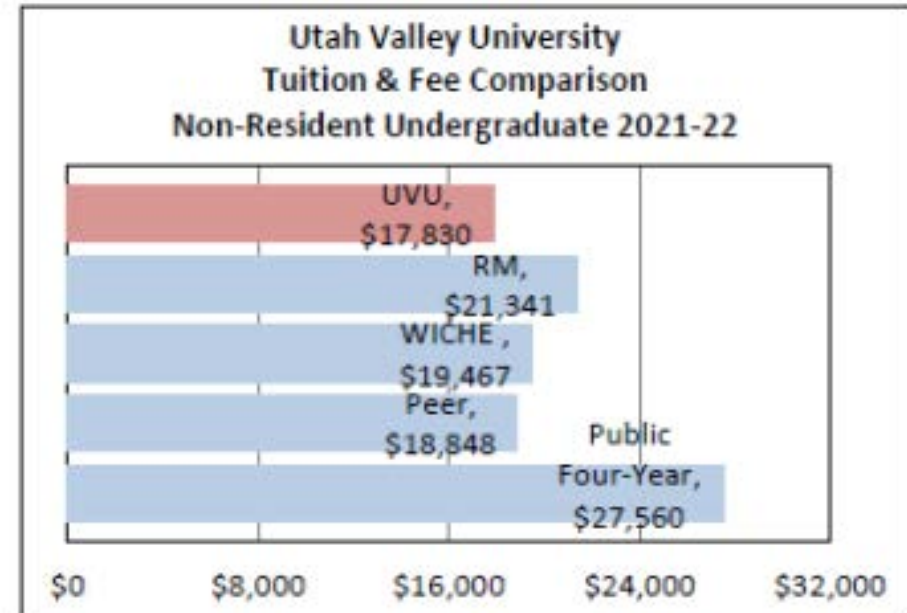
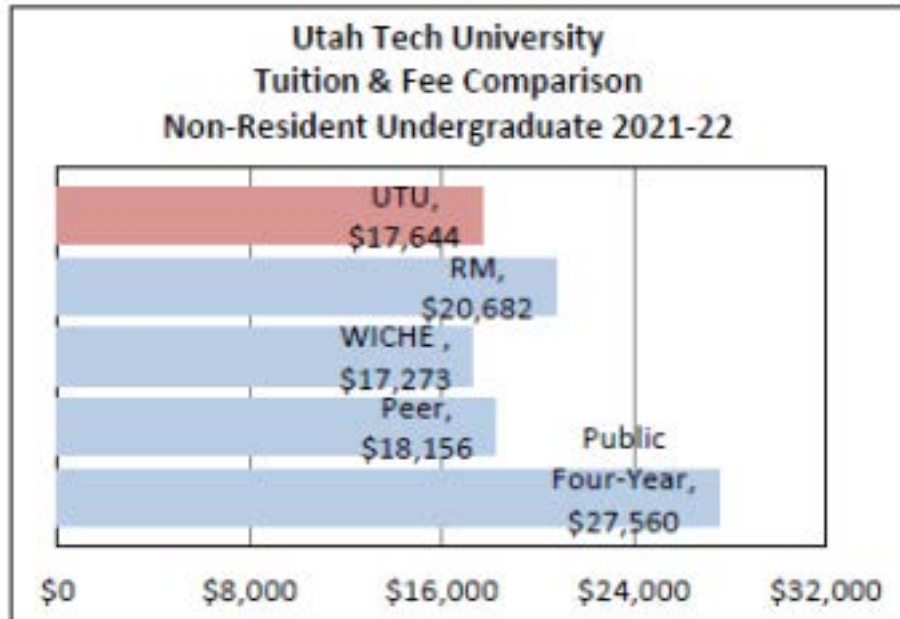
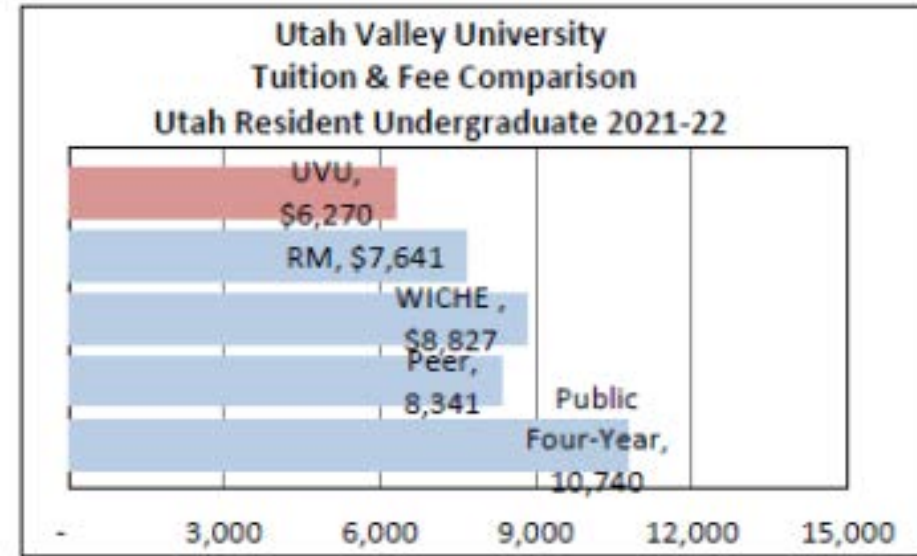
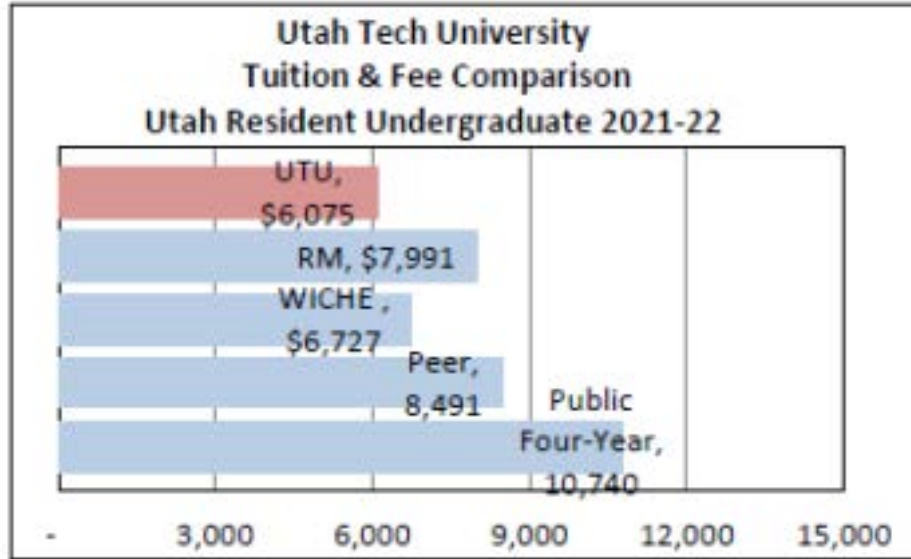
# Research Institution Peer Comparisons



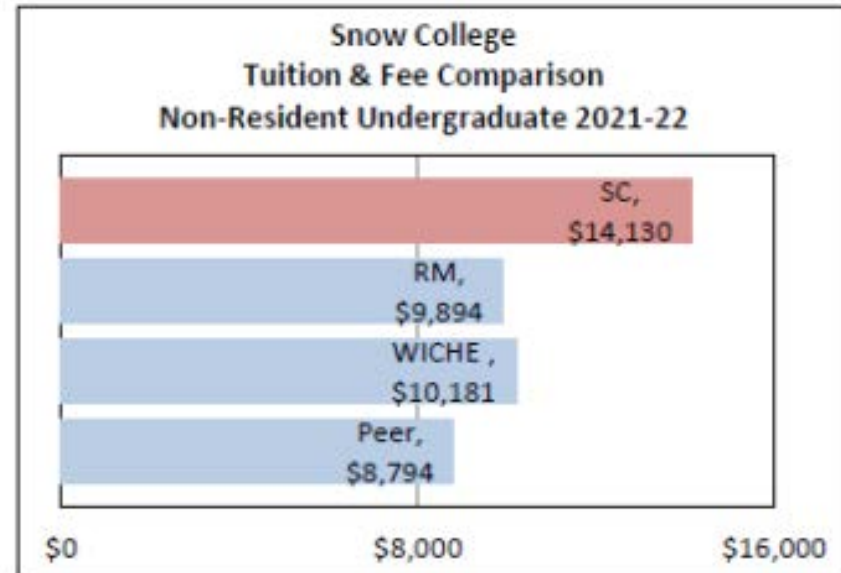
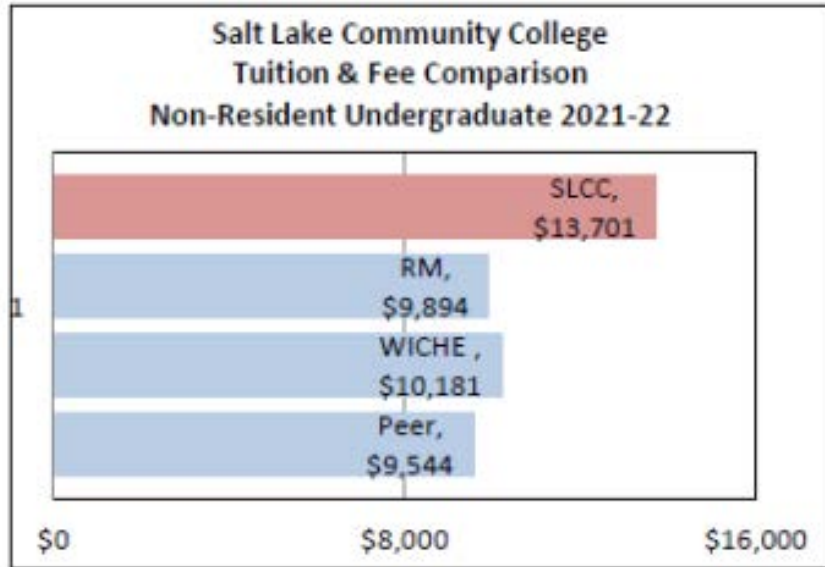
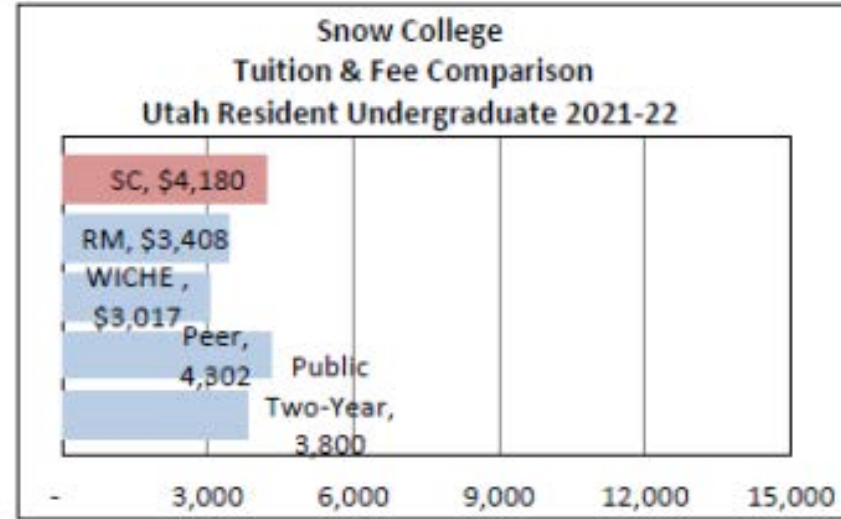
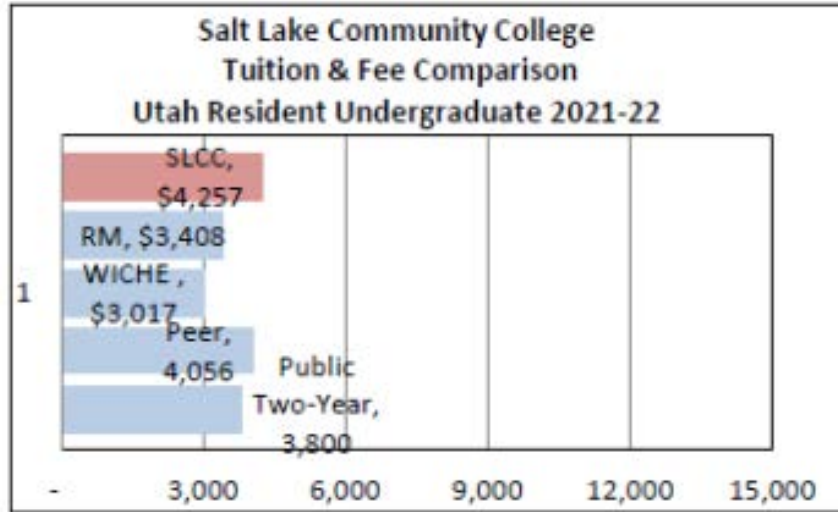
# Regional Institution Peer Comparisons



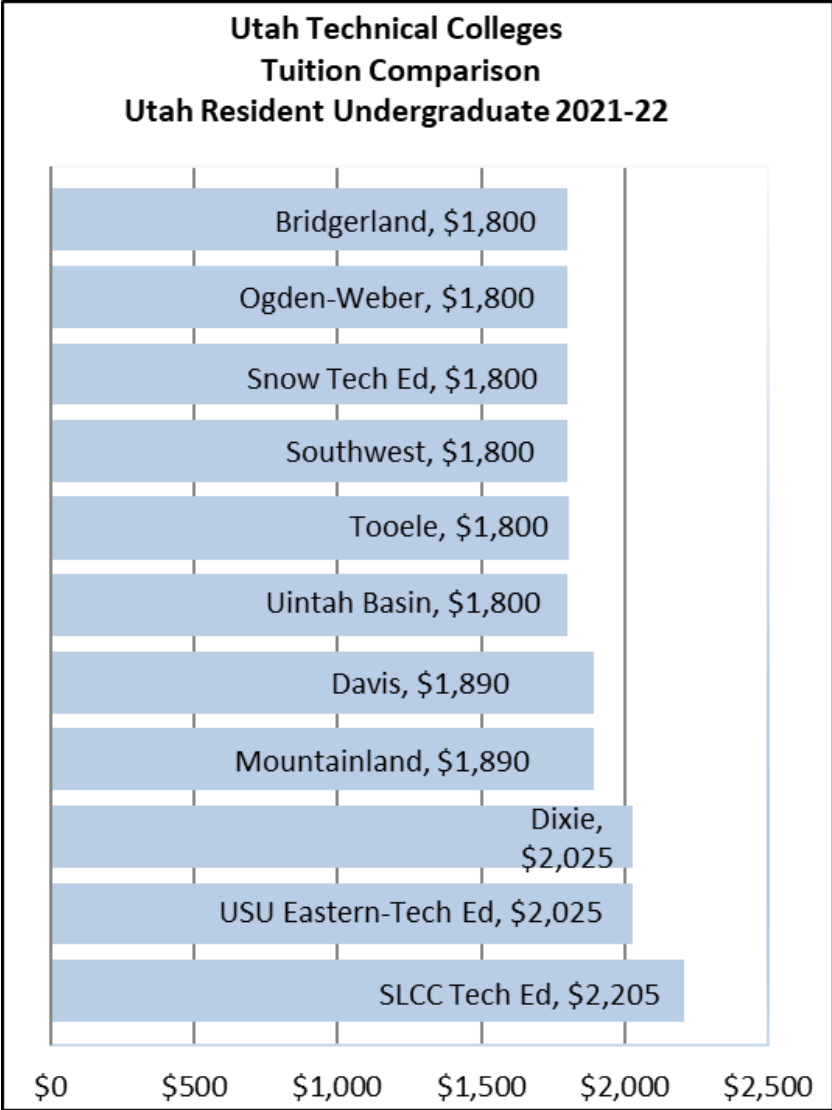
# Regional Institution Peer Comparisons



# Community College Peer Comparisons

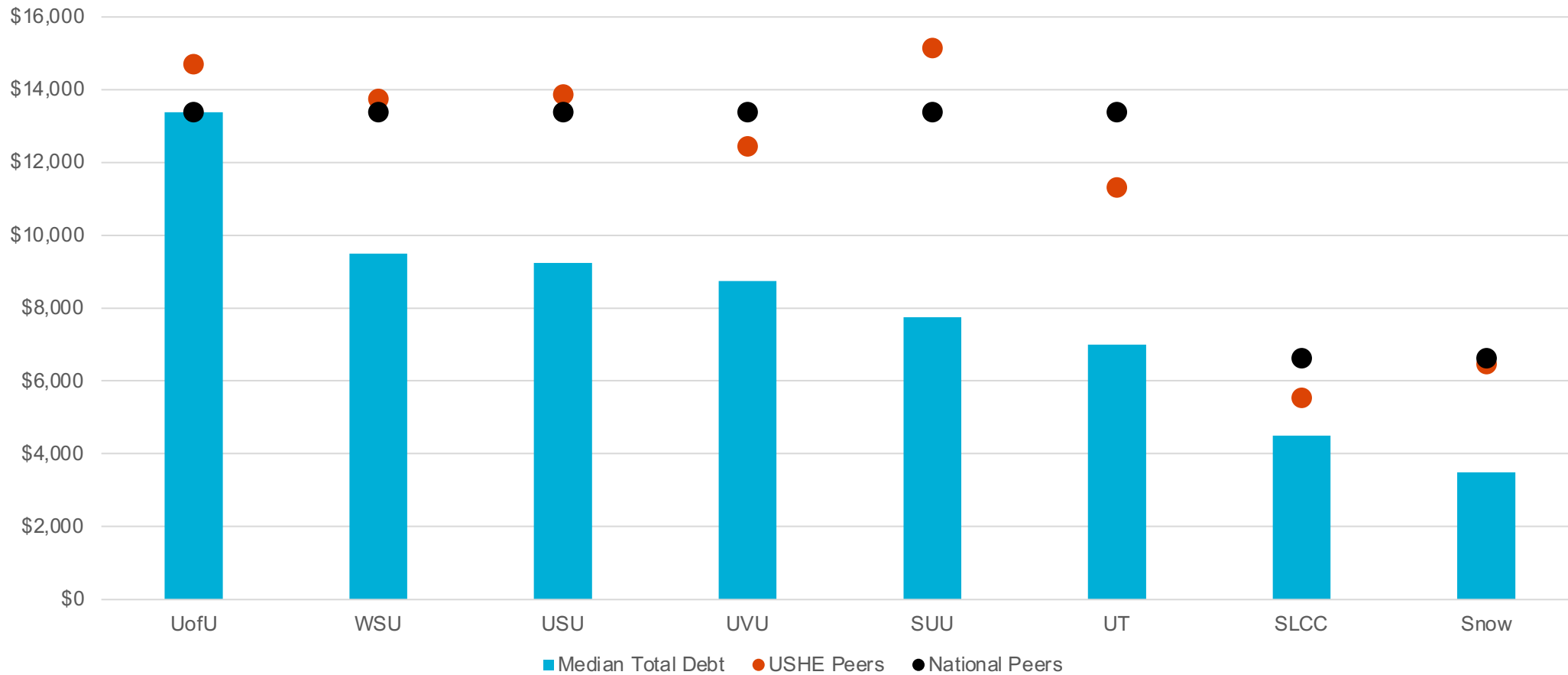


# Technical College Within-System Comparisons



# Degree-Granting Debt Comparisons

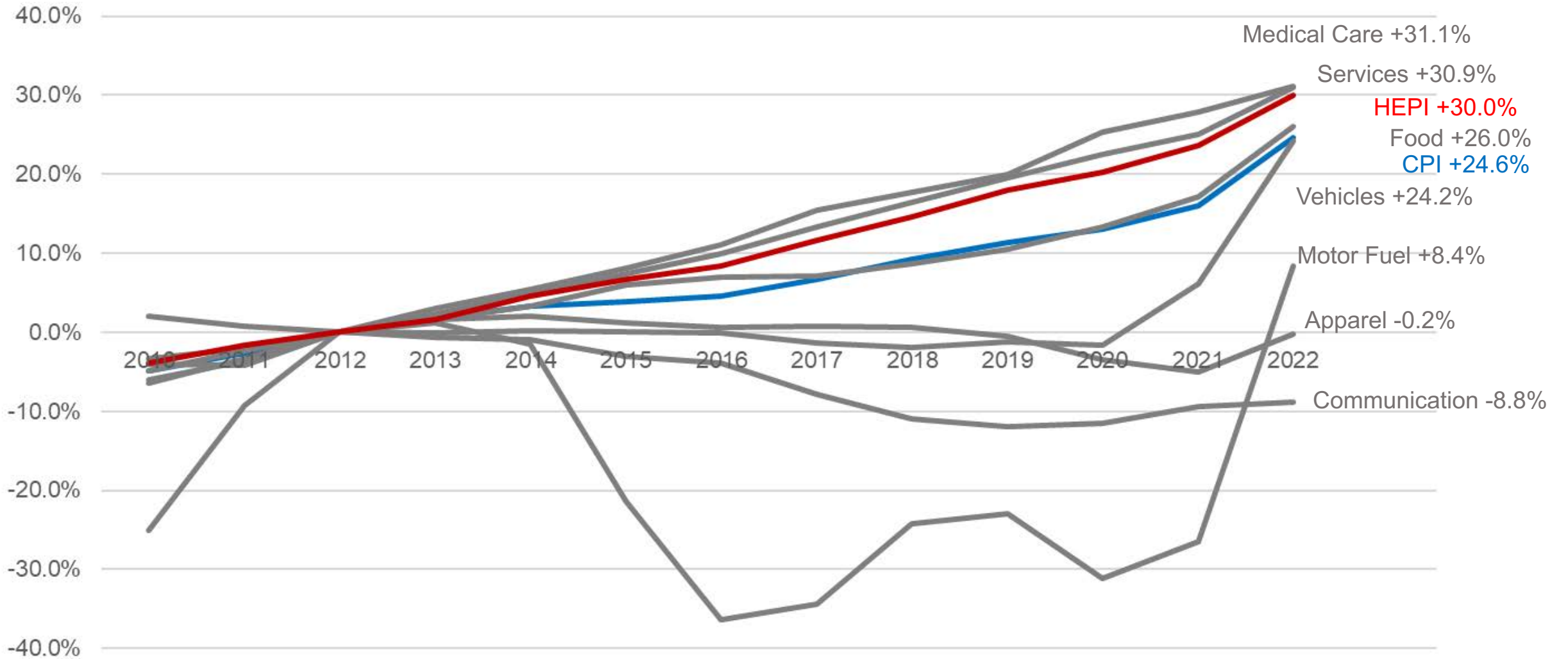
2020 Median Total Debt of Undergraduate Certificate/Degree Seeking Students  
Loan Principle Upon Entering Repayment



Source: Utah Office of the Legislative Auditor General Dashboard

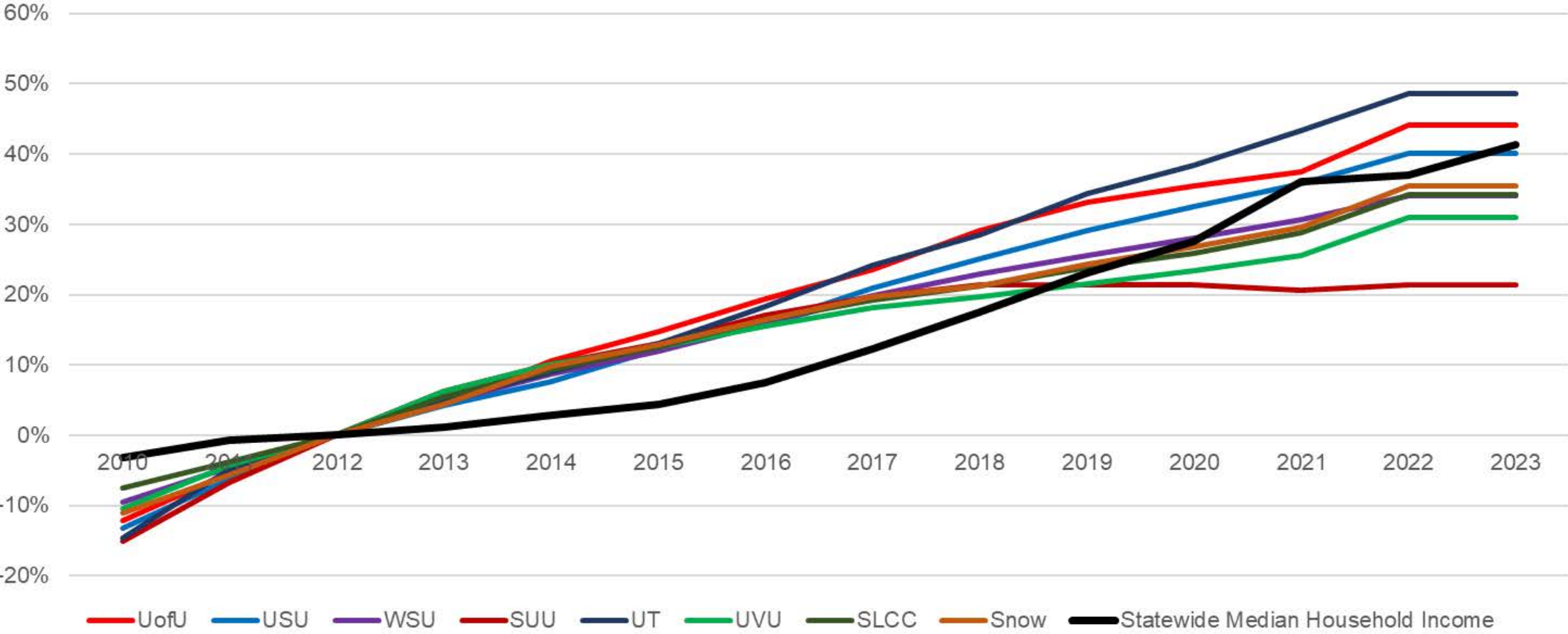
<https://public.tableau.com/app/profile/utah.legislative.auditor.general.s.office/viz/2022-11UtahHigherEducationDashboard/USHEDashboard>

# Cumulative Percent Change in U.S. Consumer Price Index (CPI) and Higher Education Price Index (HEPI), 2010-2023 by Fiscal Year





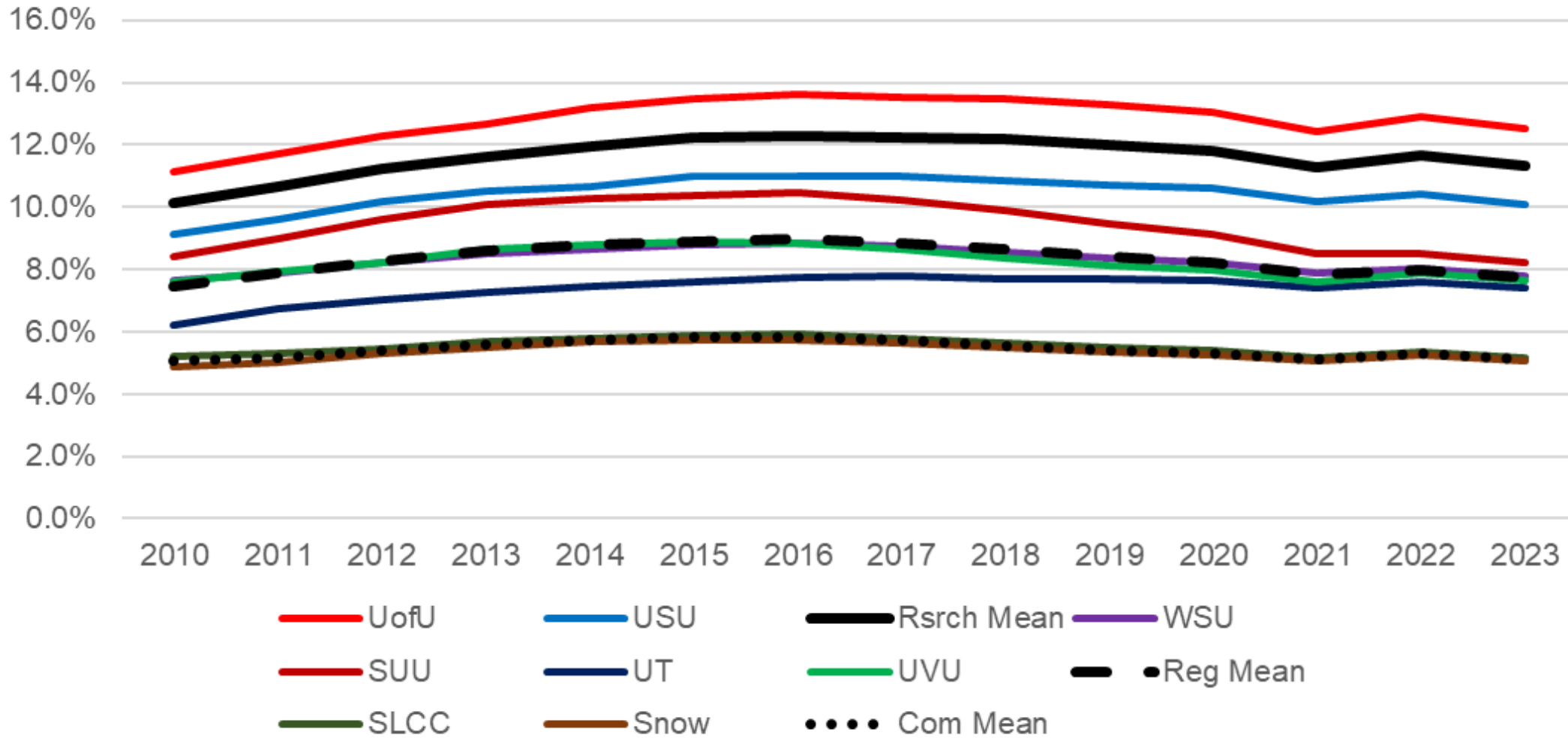
# Cumulative Percent Change in Degree Granting Institution Tuition & Fees and Utah Median Household Income, 2010-2023



UT +48.6%  
 U of U +44.1%  
**MHI +41.4%(e)**  
 USU +40.0%  
 Snow +34.5%  
 SLCC +34.2%  
 WSU +34.0%  
 UVU +31.0%  
 SUU +21.4%

Source: U.S. Census, American Community Survey & USHE 2023 Databook, USHE Forecast

# Degree Granting Institution Tuition & Fees as a Percent of Utah Median Household Income, 2010 - 2023



*2023 % of Income(e)*

U of U 12.5%

Rsrch Mean 11.3%

USU 10.1%

SUU 8.2%

WSU 7.8%

Reg Mean 7.8%

UVU 7.6%

UT 7.4%

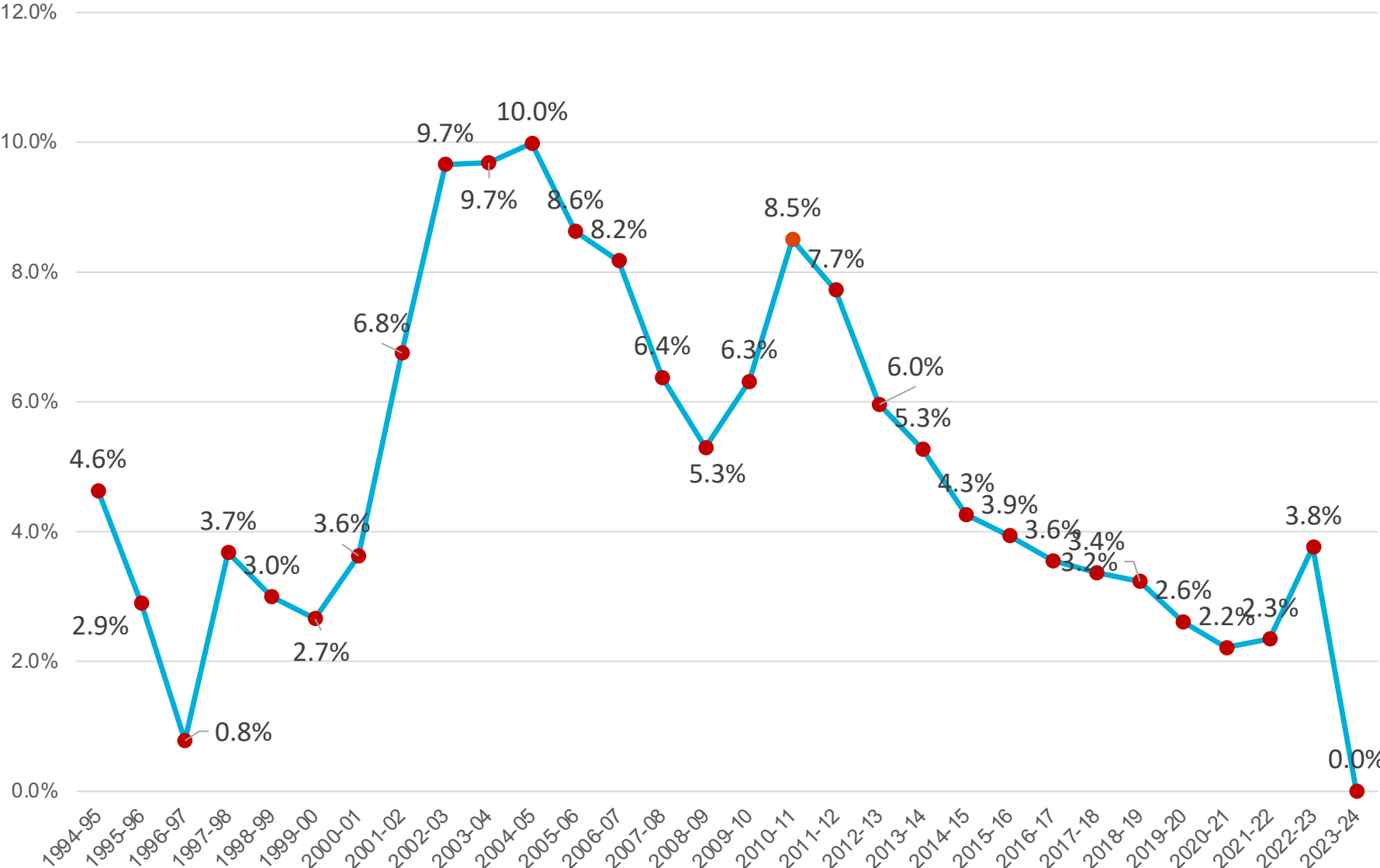
SLCC 5.2%

Comm Mean 5.1%

Snow 5.1%

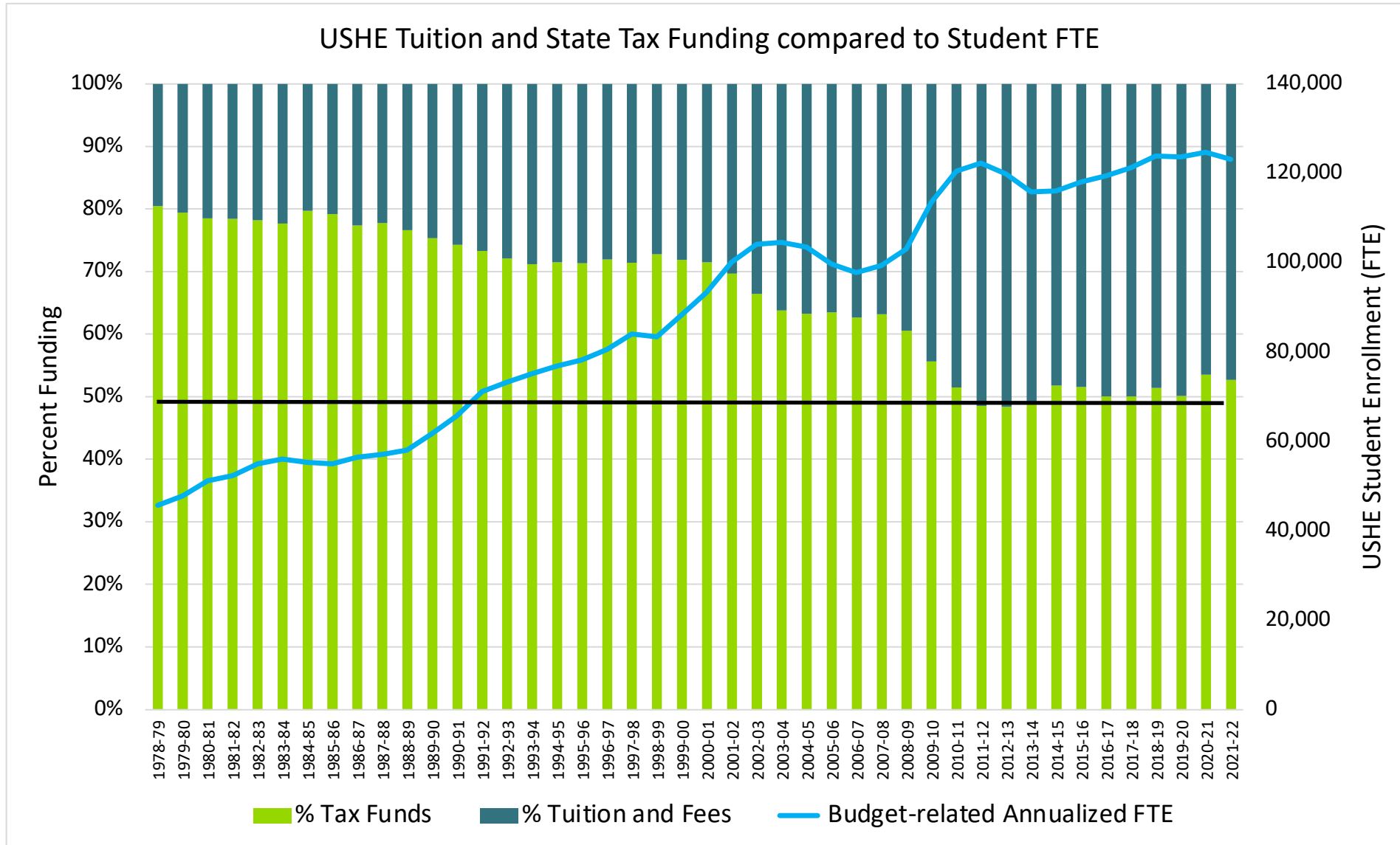
# Historical USHE Tuition & Fee Increases

USHE Annual Percent Increase in Tuition and Fees (weighted average)



Source: USHE 2023 Databook

# State Tax Funds, Tuition & Enrollment

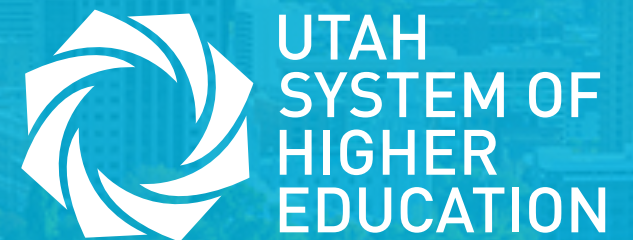


# Observations

- Utah degree granting institutions generally compare favorably to national, regional and peer institutions with respect to resident undergraduate tuition and fees, and undergraduate student debt holdings upon entering repayment.
- Long-run inflation pressures have been more persistent in service industries relative to goods industries, with implications for the labor-centric higher education sector.
- For most Utah degree granting institutions, resident undergraduate tuition and fees have increased at a slower rate than Utah median household income since the year 2012.
- All Utah degree granting institutions' resident undergraduate tuition and fee levels are below targets of 15%, 10% and 7% of Utah median household income for research, regional and community college institutions, respectively.
- The post Great Recession reduction in state cost sharing has increased the proportion of tuition and fee revenue as a share of total budgets.

# What are the Key Affordability Strategies and Tactics?

March 24, 2023



# Background & History

- Since 2015, *affordable participation* has been a strategic priority for the Board.
- In 2019, the Board commissioned the Kem C. Gardner Policy Institute to conduct a review and analysis of common methods for defining *affordability* in higher education.
- In 2020, the Board adopted the below working definition of *affordability*:

***“Affordability is the ability of a traditional full-time Utah student from a family of four to cover the cost of attendance at a USHE institution while living at home with financial aid, reasonable family savings, and the student contributing ten hours of weekly work earnings”***

- Board went on to adopt the main priorities of the strategic plan: Access, Affordability, Completion, Workforce Alignment, System Leadership and Research.

# Strategic Plan - Affordability



## Affordability



Increase student ability to pay the cost of attendance.



Ensure institutional cost of attendance remains within the standard of affordability year over year.

## Strategies & Tactics

Improve fiscal transparency and understanding. +

Coordinate and optimize financial aid. +

Increase completion of the Free Application for Federal Student Aid (FAFSA). +

Ensure institutions maintain strong fiscal health and operational efficiency. +



# Strategic Plan - Affordability

## Affordability



Increase student ability to pay the cost of attendance.



Ensure institutional cost of attendance remains within the standard of affordability year over year.

## Strategies & Tactics

Improve fiscal transparency and understanding. —

- Develop and implement full cost of attendance reporting standards and tools.
- Refine the Board's standard of affordability.

# Strategic Plan - Affordability

## Cost Study Summary Utah System of Higher Education

Instruction Level	Direct Cost of Instruction	Full Cost of Instruction	FTE Students	Student/Faculty Ratios	Direct Cost of Instruction Per FTE	Full Cost of Instruction Per FTE
1. Regular Instruction & Other Instructional Activities						
A. Vocational (CTE) Education	121,131,368	266,628,424	22,058	18.8	\$5,492	\$12,088
B. Lower Division	502,115,334	918,227,680	66,240	23.5	\$7,580	\$13,862
C. Upper Division	398,512,443	622,895,789	36,864	17.0	\$10,810	\$16,897
D. Basic Graduate	179,380,989	244,827,586	11,041	16.2	\$16,247	\$22,175
E. Advanced Graduate	80,412,132	105,418,545	4,191	12.7	\$19,188	\$25,155
<b>TOTAL INSTRUCTION</b>	<b>1,281,552,267</b>	<b>2,157,998,024</b>	<b>140,394</b>	<b>19.6</b>	<b>\$9,128</b>	<b>\$15,371</b>

# Strategic Plan - Affordability

## Affordability



Increase student ability to pay the cost of attendance.



Ensure institutional cost of attendance remains within the standard of affordability year over year.

## Strategies & Tactics

Improve fiscal transparency and understanding. +

Coordinate and optimize financial aid. -

- Evaluate, prioritize, and implement state student financial aid and scholarships.
- 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.
- Review and analyze the use of tuition waivers and identify opportunities for enhancing their efficacy.
- Evaluate the quality, effectiveness, and return on investment of existing scholarship and financial aid programs; identify opportunities for better coordination and improvement.

# Strategic Plan - Affordability

## Affordability



Increase student ability to pay the cost of attendance.



Ensure institutional cost of attendance remains within the standard of affordability year over year.

## Strategies & Tactics

Improve fiscal transparency and understanding.	+
Coordinate and optimize financial aid.	+
Increase completion of the Free Application for Federal Student Aid (FAFSA).	-

- Partner with USBE to consider ways to increase FAFSA completion in high school. Develop and implement a statewide FAFSA strategy.

# Strategic Plan - Affordability

## Affordability



Increase student ability to pay the cost of attendance.



Ensure institutional cost of attendance remains within the standard of affordability year over year.

## Strategies & Tactics

Improve fiscal transparency and understanding.	+
Coordinate and optimize financial aid.	+
Increase completion of the Free Application for Federal Student Aid (FAFSA).	+
Ensure institutions maintain strong fiscal health and operational efficiency.	-

- Create a standardized cost structure model to compare the cost of delivering credentials across USHE and other relevant institutions.
- Develop and implement a fiscal health assessment tool.
- Update capital facilities funding policies and procedures to encourage efficient planning and requests.

# STRATEGIC PLAN - AFFORDABILITY

## Financial Ratio Report - FY22

Utah System of Higher Education

Composite Index	FY18	FY19	FY20	FY21	FY22
University of Utah	5.11	5.04	4.71	5.63	3.96
Utah State University	3.49	4.17	3.82	6.15	3.97
Weber State University	5.14	5.84	5.83	7.96	4.98
Southern Utah University	3.60	3.68	3.31	6.80	2.96
*Snow College	3.12	2.19	1.63	3.20	4.35
Utah Tech University	1.89	2.09	2.80	3.22	2.69
Utah Valley University	5.89	6.31	5.18	7.05	5.97
Salt Lake Community College	6.79	5.01	6.51	6.90	5.73
*Mountainland Technical College	2.10	1.65	2.29	4.15	3.48
System Wide Score - Weighted Avg.	4.84	4.77	4.51	5.83	3.98
System Wide Score - Simple Avg.	4.12	4.00	4.01	5.67	4.23

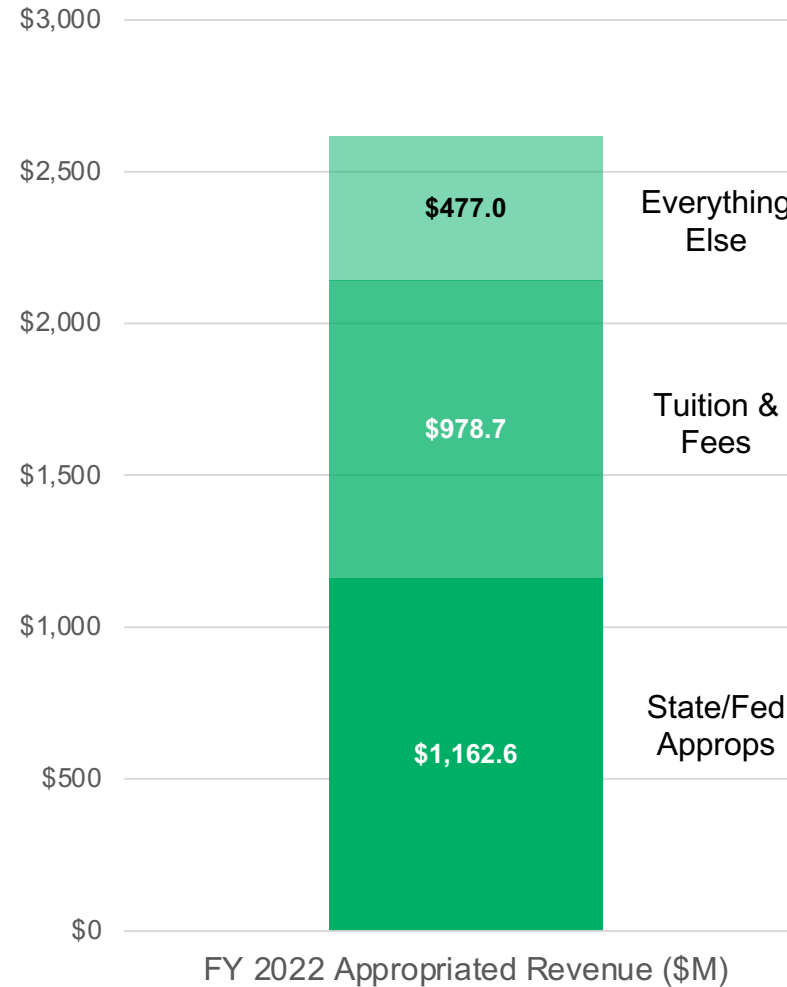
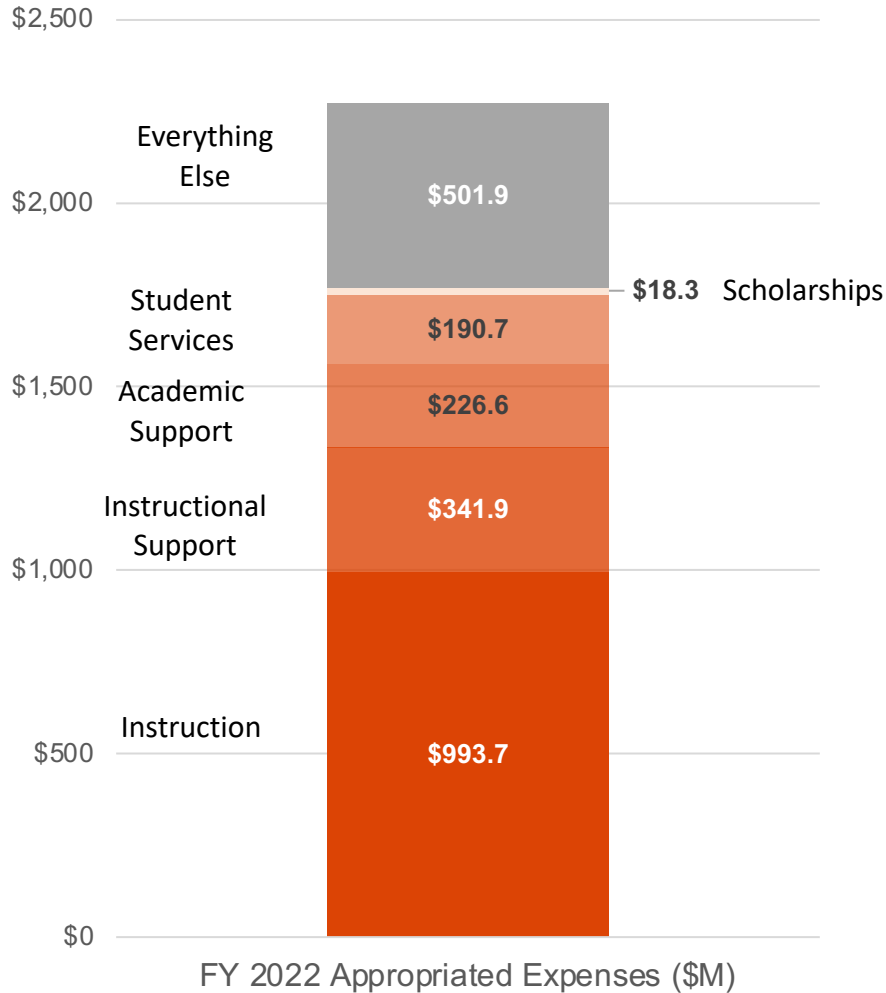
Composite Index: this calculation combines and weights all four ratios (primary reserve, net operating revenues, return on net assets, and viability) into one single financial metric. This allows a weakness or strength in a specific ratio to be offset by another ratio result, thereby allowing a more holistic approach to understanding the institution's total financial health.

> 3.00

This is a combination of four financial ratios and the higher the number the greater the institutions financial health

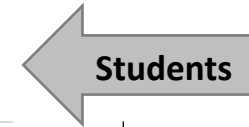
# What are Board Levers on Affordability?

Create Opportunities for Cost Avoidance by Select Sources



Increase Student Ability to Pay

- ↑ Pell Grants
- ↑ State/Local Grants & Scholarships
- ↑ Institution Grants & Scholarships

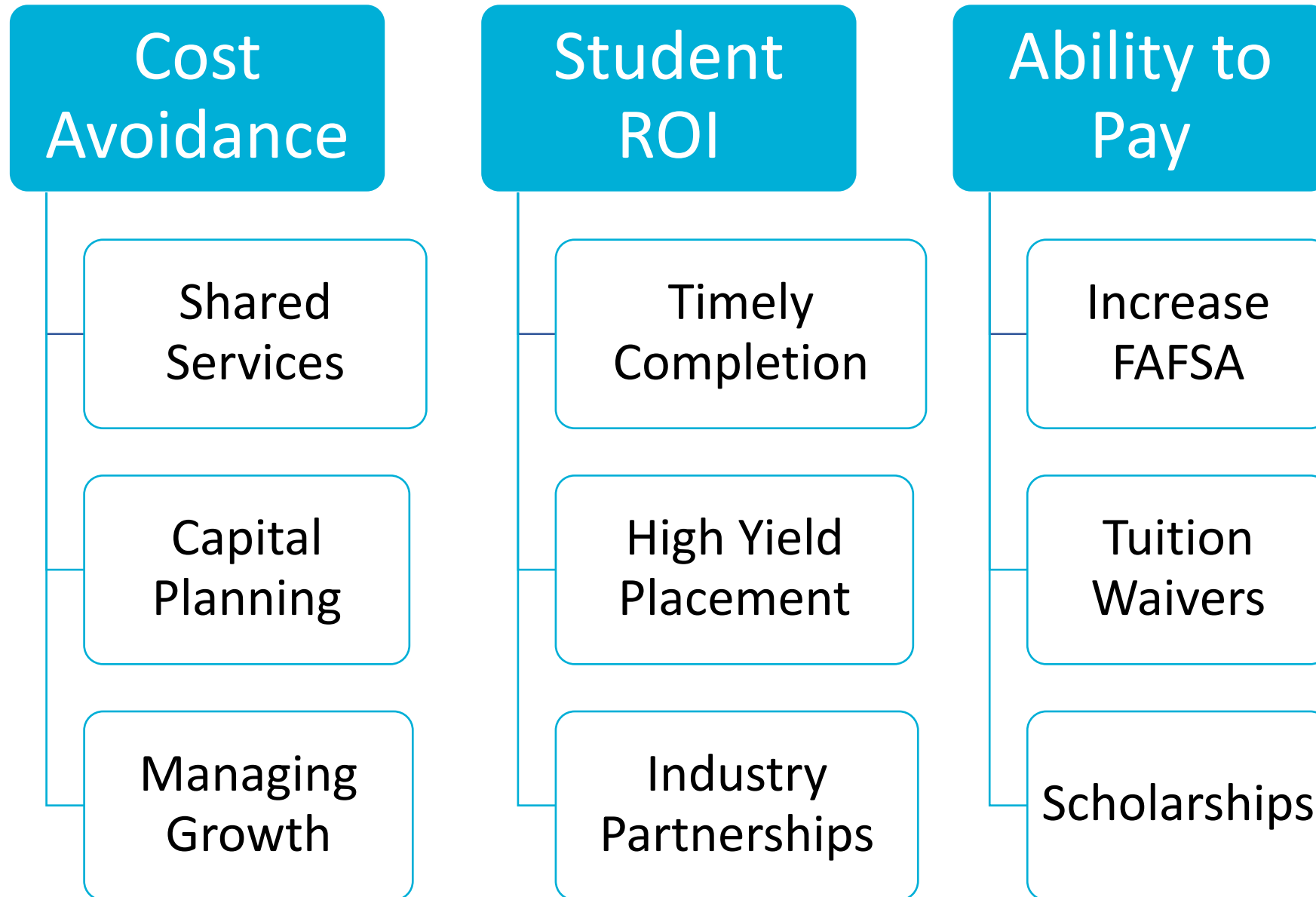


- Federal Loans
- Private Loans
- Out of Pocket



Increase ROI through Timely Completion and High Yield Placement

# What are Board Levers on Affordability?





# How do we Define Affordability? For Whom and for What Purpose?

March 24, 2023



UTAH  
SYSTEM OF  
HIGHER  
EDUCATION

# BACKGROUND & HISTORY

## Current Working Definition

*“Affordability is the ability of a traditional full-time Utah student from a family of four to cover the cost of attendance at a USHE institution while living at home with financial aid, reasonable family savings, and the student contributing ten hours of weekly work earnings”*

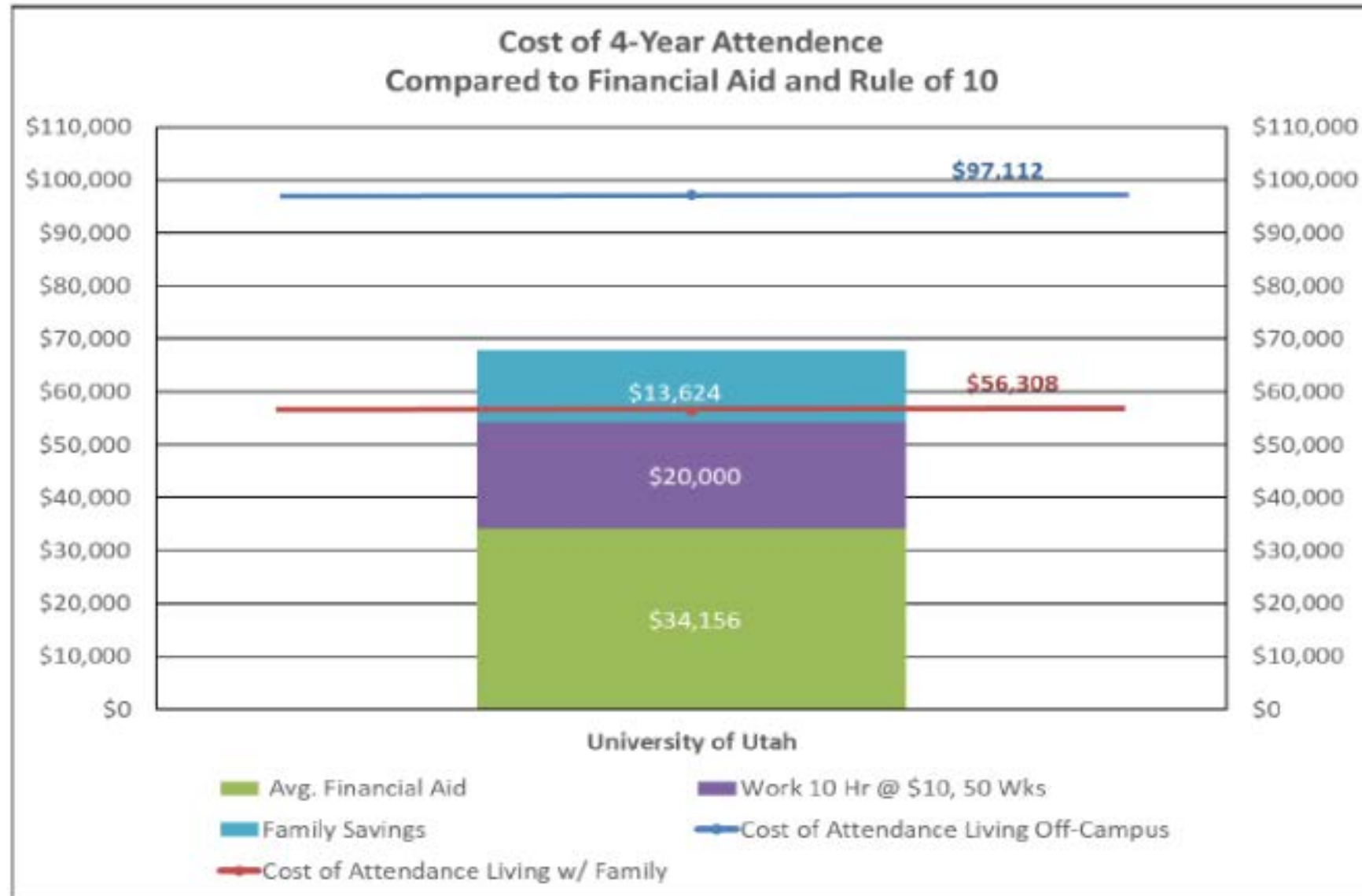
## Derivative of Lumina Foundation Rule of 10

- Family savings over a 10-year period for families with income greater than or equal to 200% of the Federal Poverty Level
- Student income from working 10 hours a week at \$10/hour while enrolled
- Net financial aid

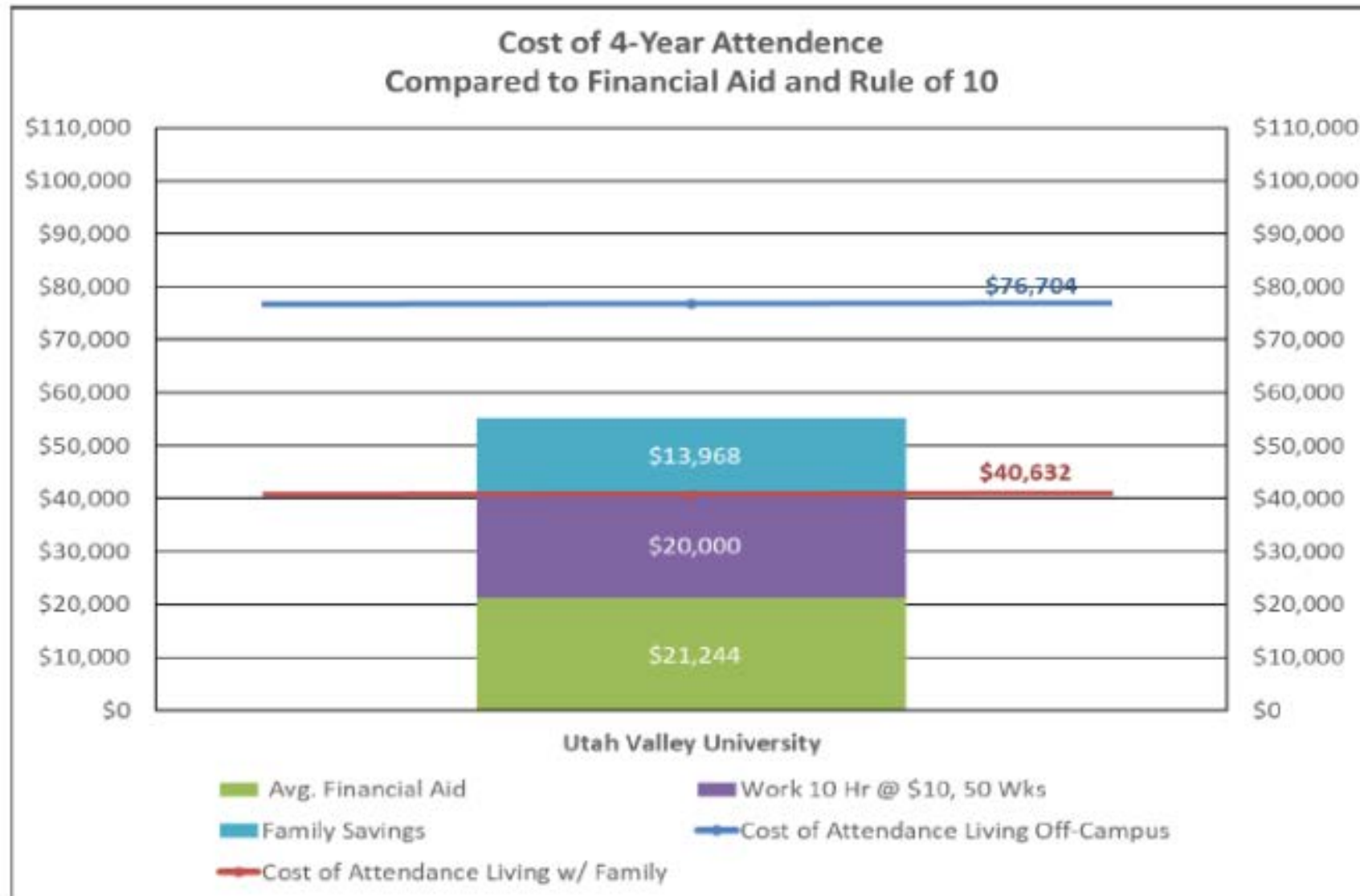
## For what purpose?

- Annual tuition rate setting and review under Board policy R510
-

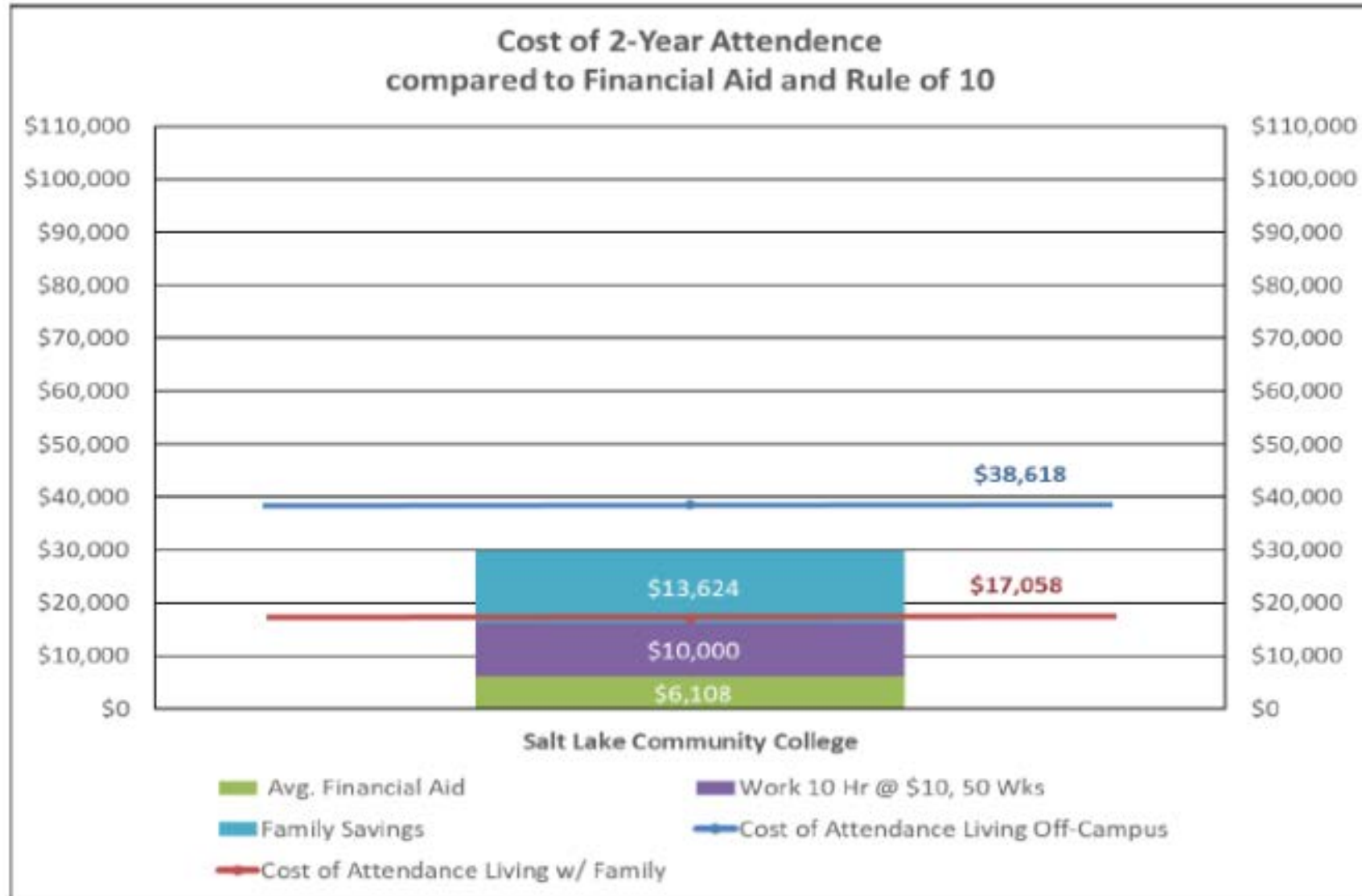
# Example - University Of Utah



# Example – Utah Valley University



# Example – Salt Lake Community College



# What's Missing?

## **Variance by Institution**

- Role & Mission: Research, Regional, Community, Technical
- State & Regional Economic Influences: Growth, Labor Markets, etc.

## **Variance by Student**

- Demographic & Socioeconomic Status
- Education Objectives & Course of Study

## **Education as an Investment and not only a Consumption Good**

- Return on Investment
- Opportunity Cost
- Time Horizon

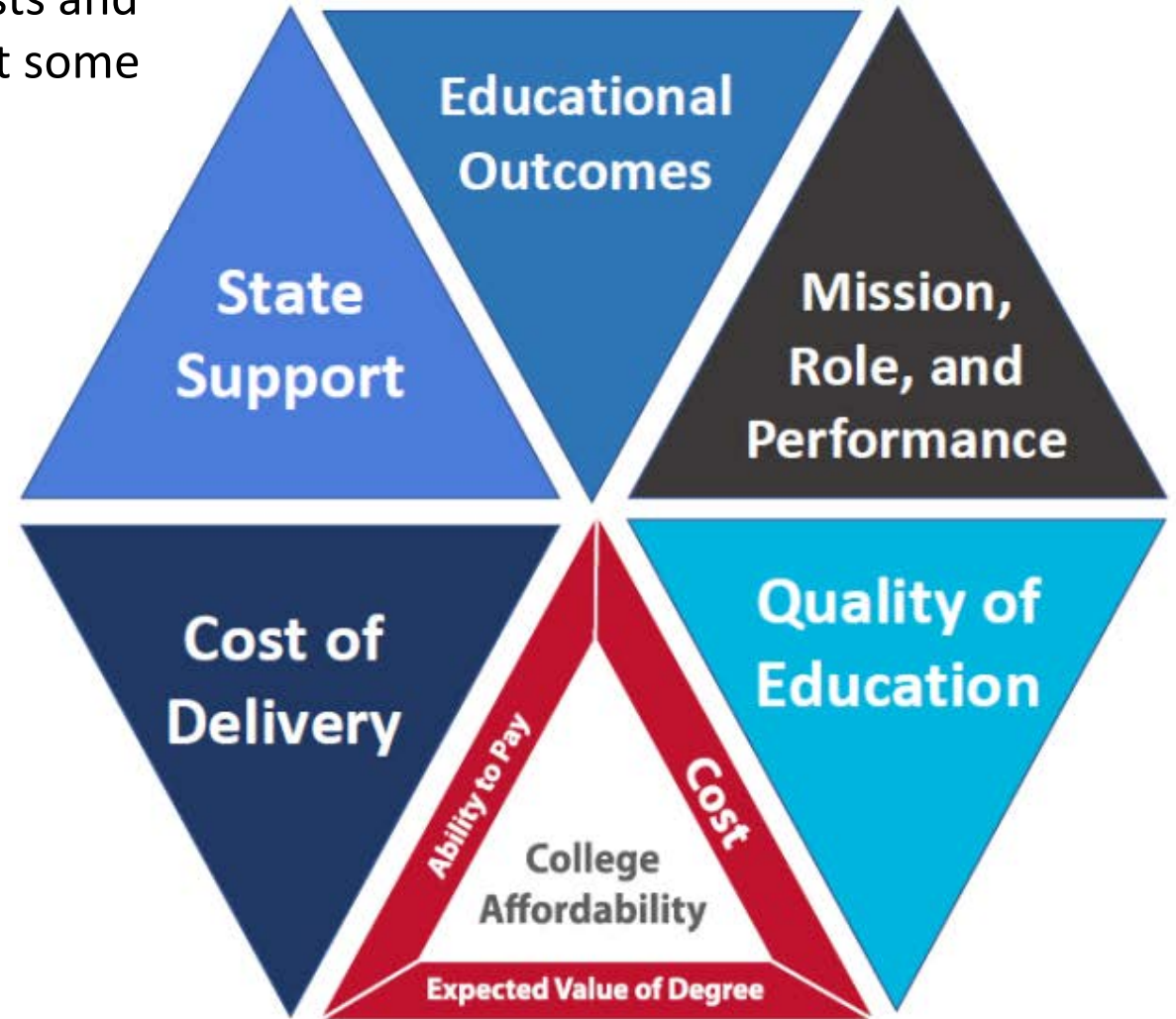
## **For what Purpose?**

- Annual tuition rate setting and review under Board policy R510
- Resource to inform Board and institution operations and policies to advance broader set of strategic goals

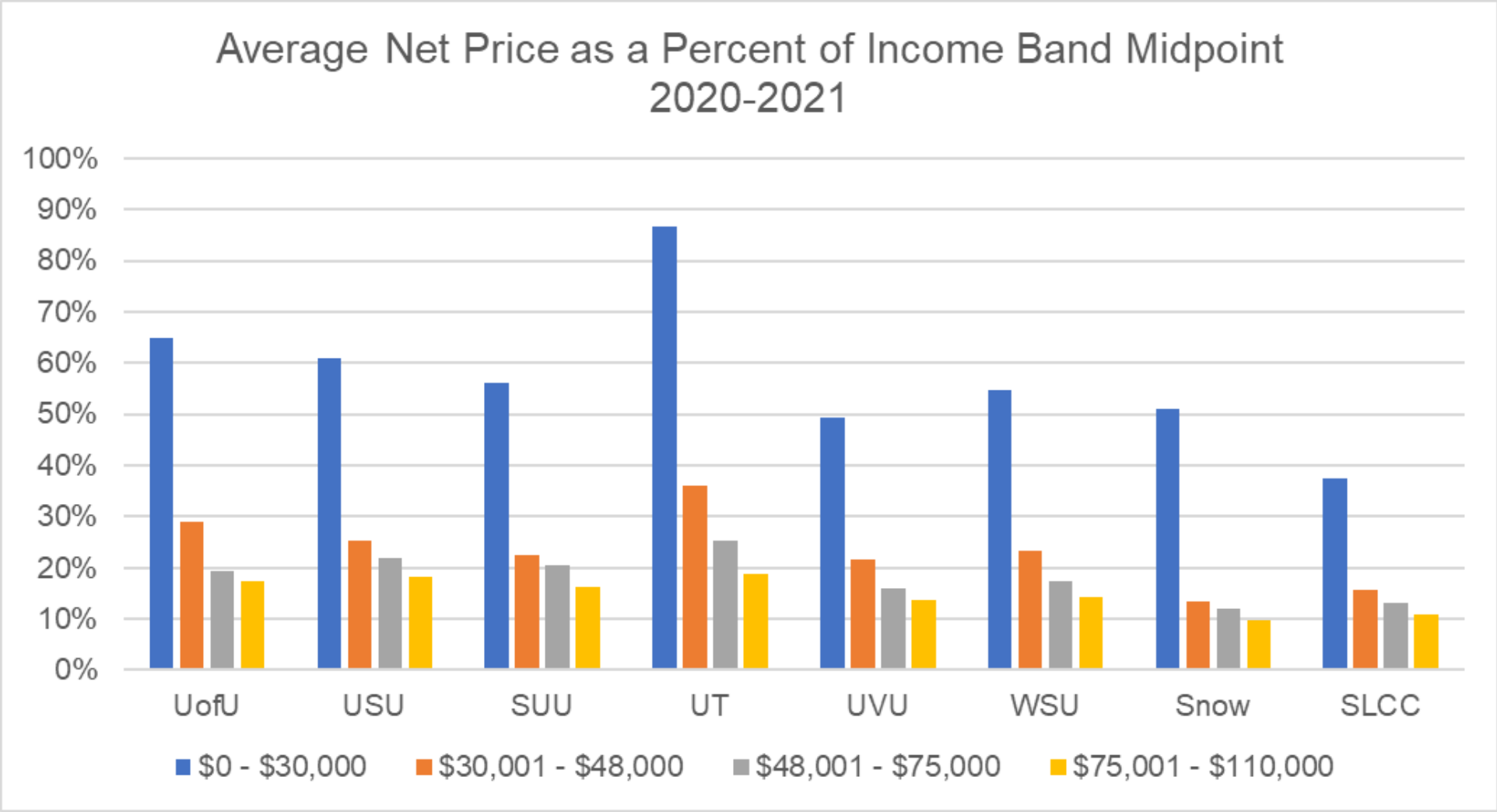
***Distribution of affordability by institutions and students considering ROI, opportunity cost and time horizon***

# What Else is Missing?

Some direct and indirect monetary costs and benefits would be better captured, but some elements to the educational value proposition remain unaddressed.



# Definition Considerations

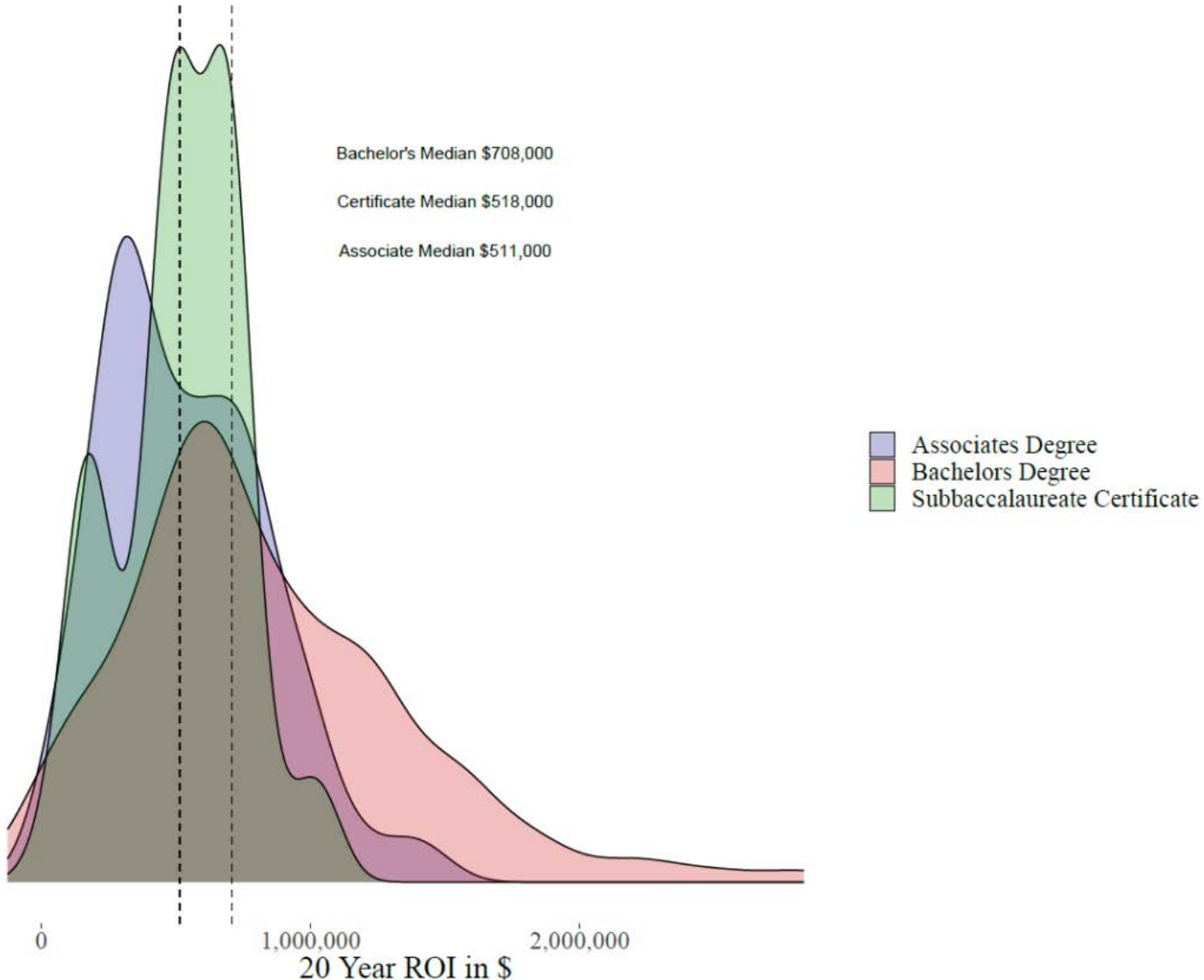


Average Net Price for Full-Time Beginning Students: Full-time beginning undergraduate students who paid the in-state or in-district tuition rate and were awarded grant or scholarship aid from federal, state or local governments, or the institution.



# Definition Considerations

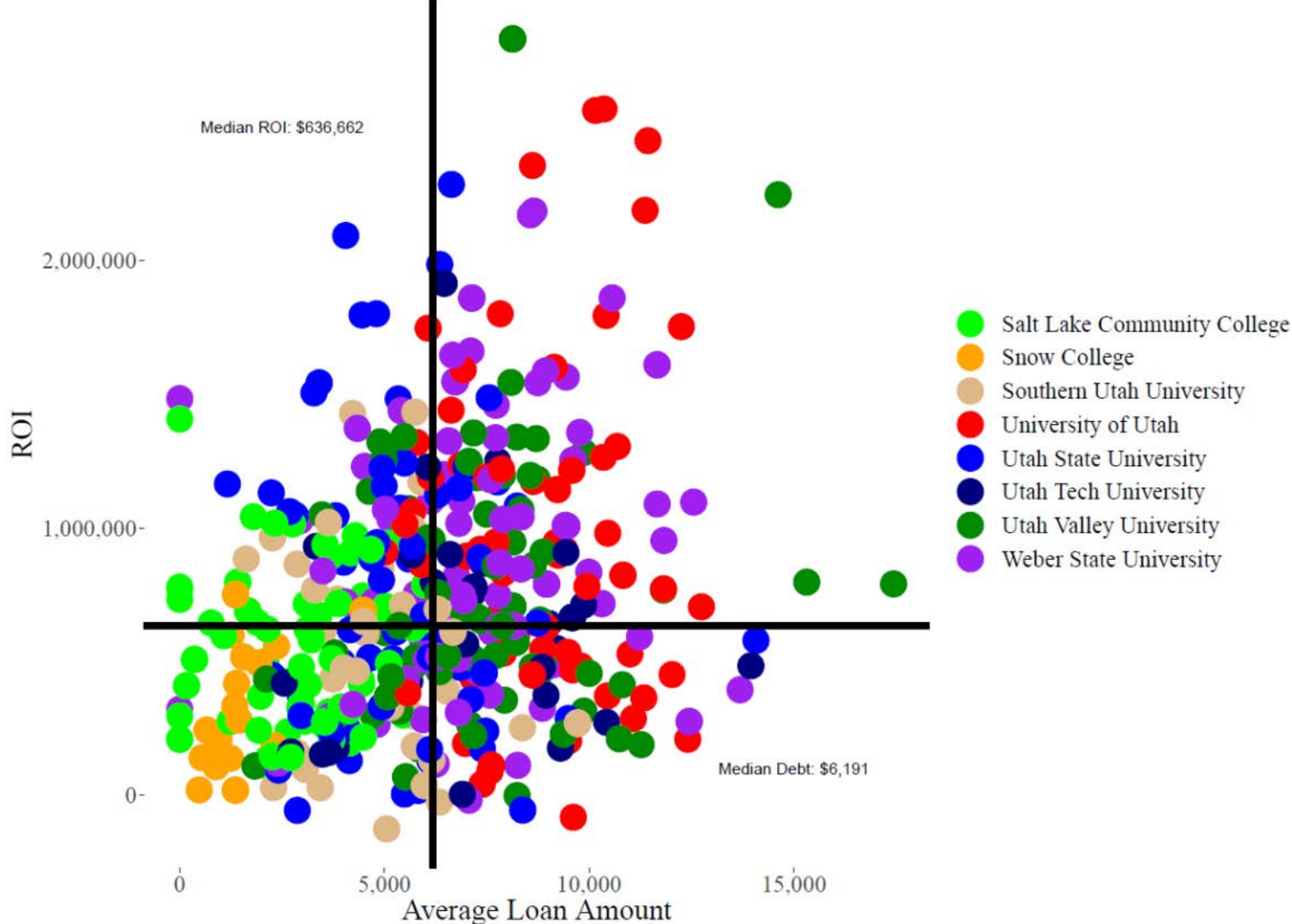
## Utah Degree Granting Institution 20-Year ROI



Source: Launch My Career Utah - <https://launchmycareer.utahfutures.org/>

# Definition Considerations

Degree Granting Institution 20-Year ROI & Median Debt by Program



Source: Launch My Career Utah - <https://launchmycareer.utahfutures.org/>

# Case Study 1

- 18-year-old recent high school graduate considered “dependent” on FAFSA
- Works 10 hours a week for minimum wage
- Enrolled full time
- Lives at home with younger sibling and parents who both have Bachelor’s degrees and work full time
- Has a 529 account of the national average value for an 18-year-old account

Annual household take-home income	Annual household expenses (not including educational expenses)	Annual “discretionary” amount left over, plus previous savings	Annual tuition, fees, books, and supplies before federal, state, or institutional aid
\$92,225	(\$)76,994	\$15,231 + \$27,778 in 529 account <i>(not including parent’s savings)</i> <hr/> <b>\$43,009</b>	DG: (\$)7,190  TE*: (\$)2,359

# Case Study 2

- Two married, 27-year-old students considered “independent” on FAFSA
- One works 40 hours per week, one 20 hours per week (both making average wage for high school graduates)
- Both enrolled half time
- Raising a baby who goes to childcare during the day so parents can work and attend class

Annual household take-home income	Annual household expenses (not including educational expenses)	Government means-tested annual childcare subsidy	Annual “discretionary” amount left over, plus previous savings	Annual tuition, fees, books, and supplies before federal, state, or institutional aid
\$49,723	(\$)51,463	\$9,852	\$8,112 + \$5,000 <i>personal savings</i> <hr/> <b>\$13,112</b>	DG*: (\$)7,773  TE*: (\$)4,033

# Case Study 3

- 18-year-old recent high school graduate
- Parents live abroad, are not situated to provide financial support
- Undocumented, but qualifies for in-state tuition under HB 144
- Works night shifts 40 hours/week for \$10/hour, pays federal taxes via ITIN
- Enrolled full time

Annual household take-home income	Annual household expenses (not including educational expenses)	Annual “discretionary” amount left over, plus previous savings	Annual tuition, fees, books, and supplies before federal, state, or institutional aid
\$17,732	(\$)11,833	\$5,899 + \$1,200 <i>personal savings</i> <hr/> <b>\$7,099</b>	DG: (\$)7,024  TE: (\$)3,616

# Shortcomings of Current Definition and Rule of 10

## Case 1

- Both frameworks are applicable

## Cases 2 and 3

- In an independent situation, student is their own household
- Limiting work to 10 hours/week is unrealistic for students with personal and familial noneducational financial responsibilities
- 10 years of parental savings not available

## Core question:

# Is college considered affordable when...

- ...a student or family can pay for it with the money they make and the assets they own?
- ...a student or family can pay for it with the help of gift aid?
- ...a student or family can pay for it with the help of loans?

# Affordability for Whom: Do Students Experience the Same ROI on Higher Education?

Carrie Mayne, USHE Chief Economist

Laís Martinez, USHE Chief Diversity Officer





# Centering Student Lived Experiences

In 2020, USHE, in collaboration with the Board and its institutions, defined 'affordability' as:

*“The ability of a traditional full-time Utah student from a family of four to cover the cost of attendance at a USHE institution while living at home with financial aid, reasonable family savings, and the student contributing ten hours of weekly work earnings.”*

The next several slides will provide narrative for how USHE students define affordability.

# Affordability for Whom?

*"...Reading the USHE definition on 'affordability', I feel reminded that my family...can't always provide what other families can. I've been extremely grateful to have a scholarship from SLCC, but if I didn't have that support, I don't believe I would be where I am... With the demands of the current world, it's just not in the cards for a person like me to be in college without aid. As much as my family wants me to succeed, they aren't able to contribute towards my education. It's going to need to be a journey I navigate on my own...I think Utah higher ed institutions can be doing more to uplift and assist their students. One of the biggest barriers I've noticed among friends who are thinking about going into college is the cost. Reading the USHE definition of affordability strikes more of a statement of comfortability. It doesn't feel accommodating of the diverse living situations Utah students are facing post-pandemic and with Utah's increased cost of living."*

**-B. Jesus Ruelas, USHE Student**

# Affordability for Whom?

*"... I am under the impression that education at community colleges should be free so the concept of affordability is relative to the individual. The term "affordability" is too broad to apply to the majority of people. I was working 60 hours a week to just barely get by and school was not an option for me when I was younger...The notion of affordable education is great in theory, but this remains a theory because everyone's journey is different, and the concept of affordability is a vast spectrum depending on the audience."*

**-Max Kovacs, USHE Student**

# Affordability for Whom?

*"I think that the old affordability statement only covers the ideal students, fresh out of high school and supported by their families. I don't think that the old affordability statement applies to students living with increased inflation, who are parents, students that support their families, and students who have a bigger family size."*

**-Alex Bonifaz, USHE Student**

# Affordability for Whom?

*“As a first-generation student it is my dream to carry my ancestors' names on my back. My parents and ancestors sacrificed leaving their homelands to come to the mainland to have a better life. There is nothing more important than getting our family last name on that degree. However, it can be tough trying to afford to get that degree all while balancing work, sending money to families back in the homeland, and paying for school. It is my responsibility to make it and is no longer a desire with how much I have to worry about making ends meet to stay in school.”*

**-First-Generation USHE Student**

# Affordability for Whom?

*“My dad and the rest of my family live in Papua New Guinea. They wanted a better life for us, so they sent my sister and I to America for a better life. However, as an international student it can be expensive with paying tuition. My dad is the only one that works and is providing for my mom and 6 of my siblings. He advised me to get a job because it was tough to be the only one working while providing for the rest of the family. I quickly had to learn how to grow up and take care of my sister.”*

**-International USHE Student**

# Affordability for Whom?

- *“Affordability looks like free tuition or cheaper tuition that allows me to have a balance of school, work, social life, and more.”*
- *“Tuition is the biggest pain point followed by technology, books and course materials, and housing. Especially those matriculation fees or hidden fees. We wish it was all shown upfront in costs.”*
- *“My class started off over 35 students in the first couple of weeks. Eventually, students told me they wanted to drop out after not being able to juggle work and all the assignments. They had financial aid advisors but that did nothing because most students barely received anything from FAFSA. It’s almost the end of my semester and now there’s only about 10 of us left in class. That is affordability for you. Getting students hopes up that they can get their degree only to say that there is a caveat...it is actually expensive to get it.”*

**-AAPI USHE Students**

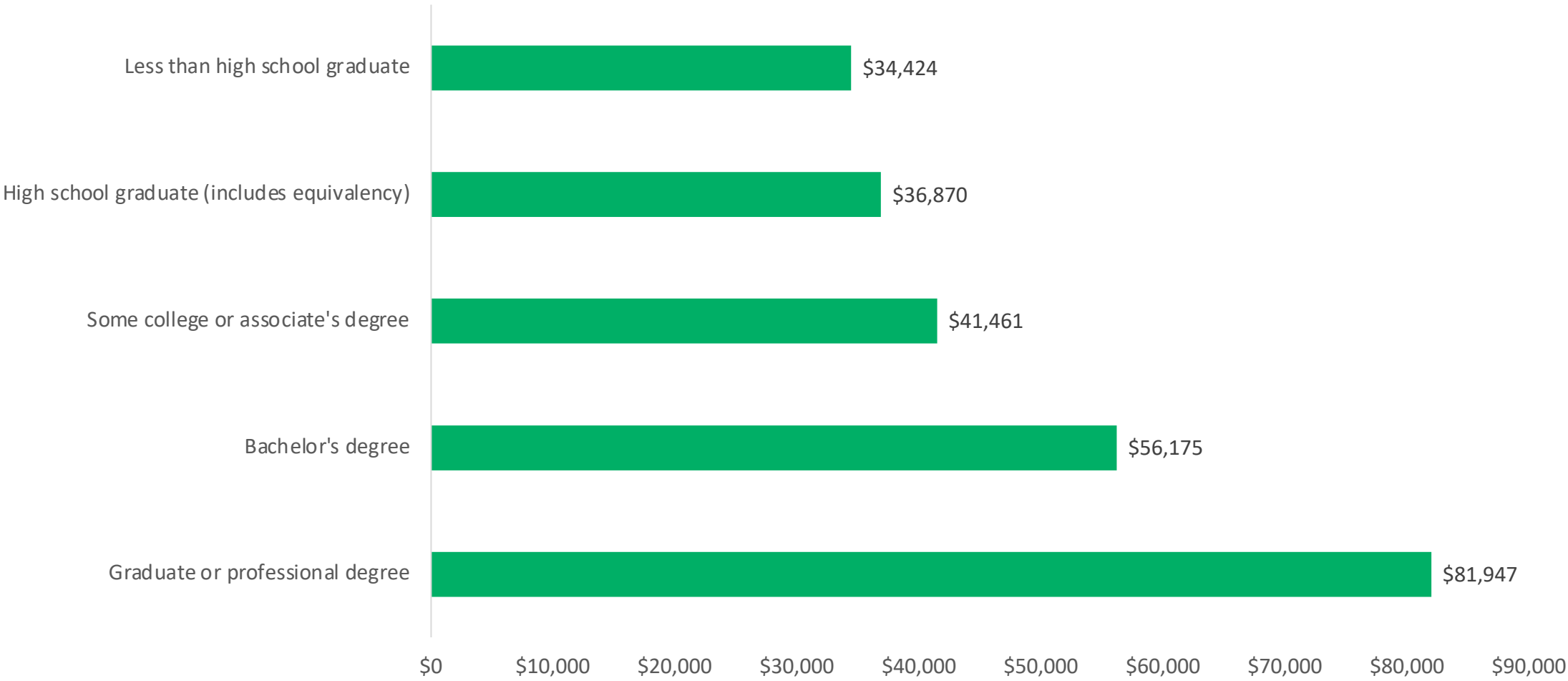
# Affordability for Whom?

*“Most Pasifika students are struggling with cultural and familial demands. Parents are expecting children to prioritize work over school. If they are too old to work, then they expect the kids to step up and take care of the family. Work is priority over anything else in my parents' eyes. They think school takes too long and is too expensive to obtain when the money could be used paying bills.”*

**-Bernice Ova**, Asian American & Pacific Islander,  
Multicultural Student Success Coordinator

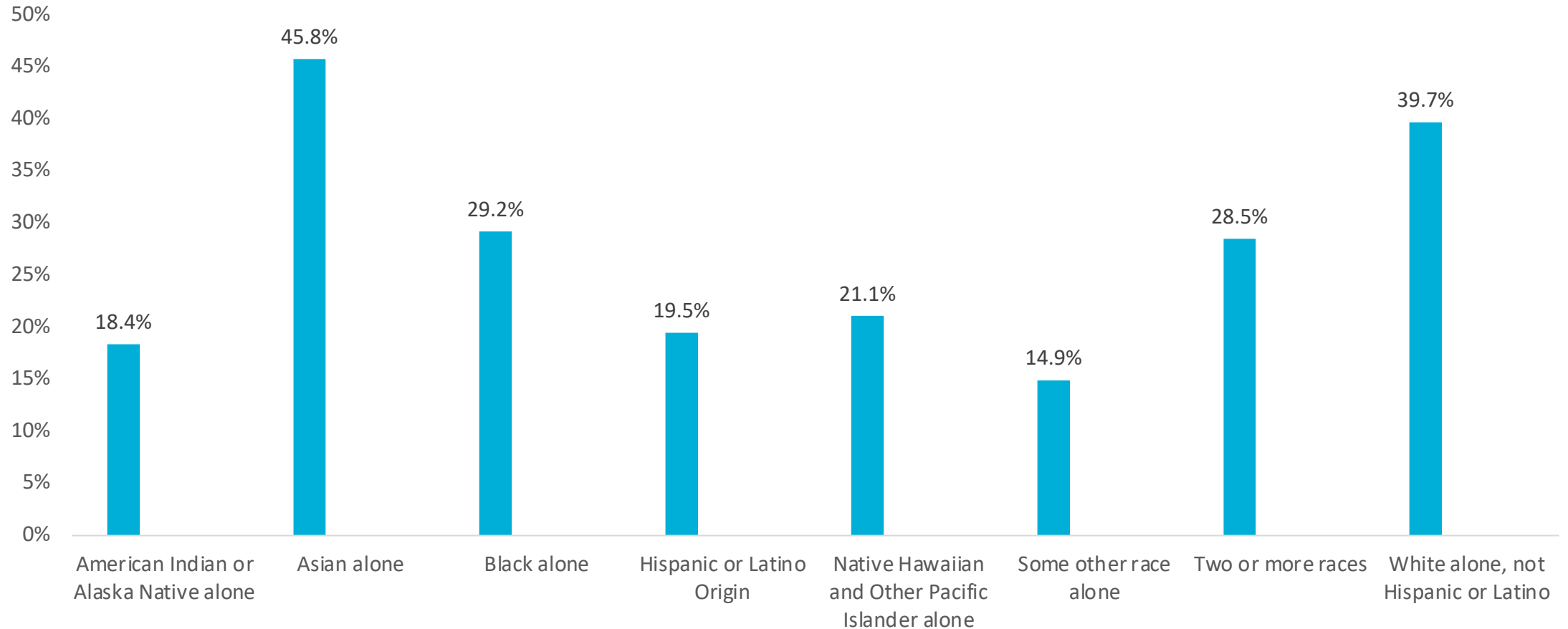


# Annual Earnings by Level of Education



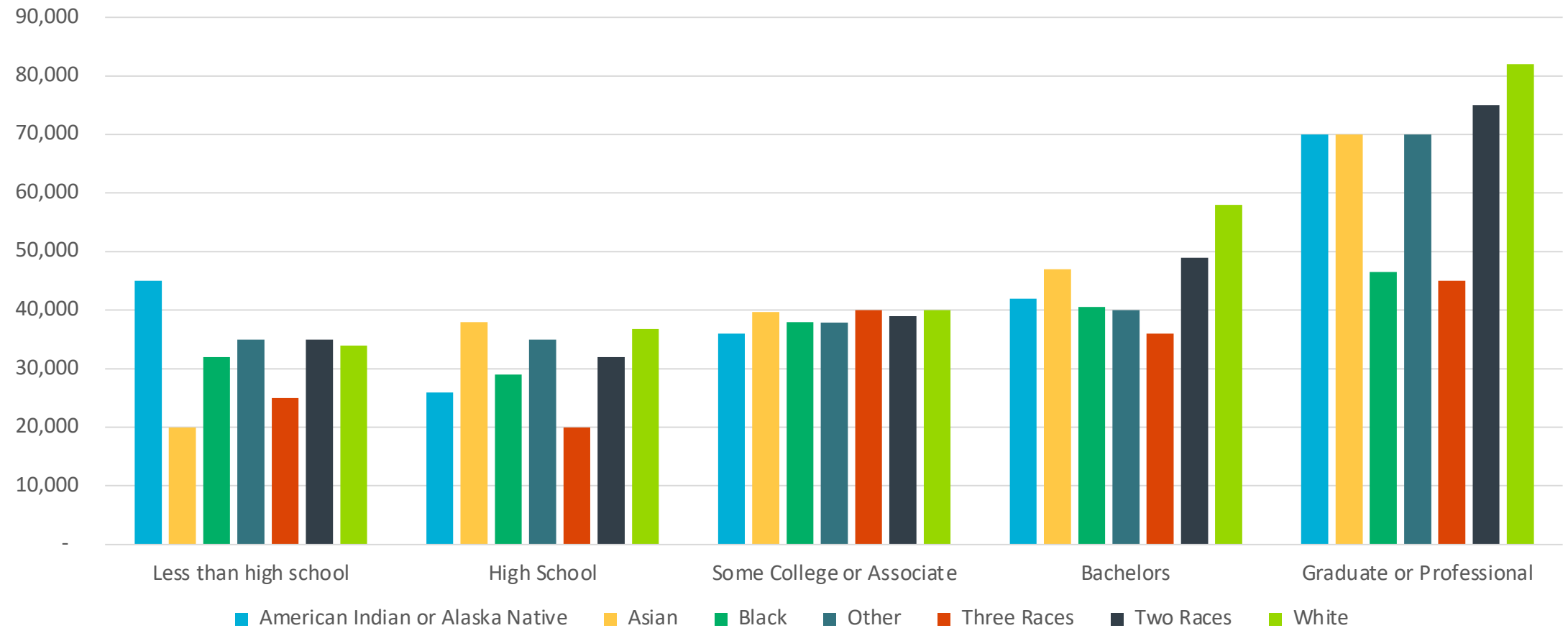
Source: 2021 American Community Survey

# Share of Utah Demographic Group Holding Bachelor's Degree or Higher



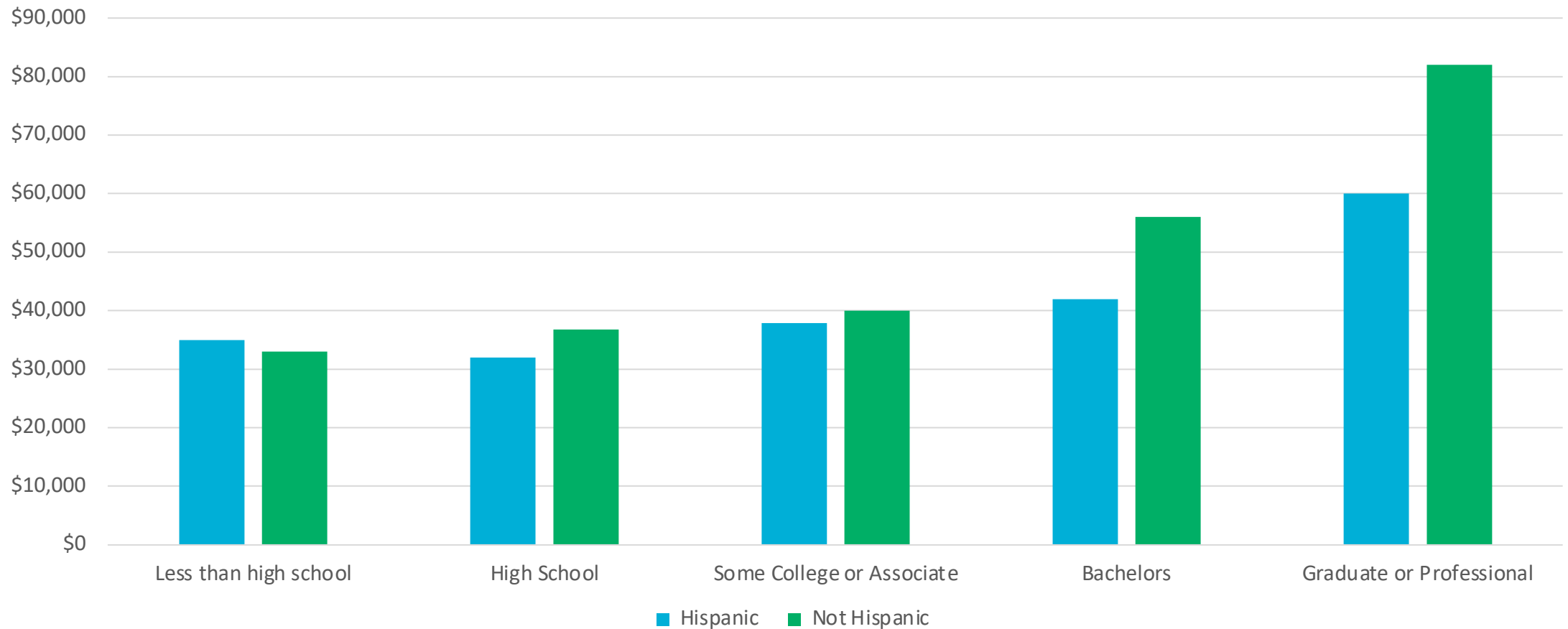
Source: 2021 American Community Survey

# Income by Educational Attainment and Race



Source: 2021 IPUMS (American Community Survey)

# Income by Educational Attainment and Hispanic Ethnicity



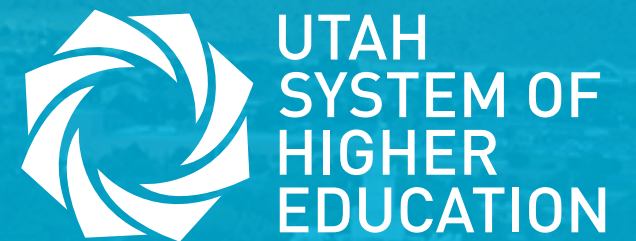
Source: 2021 IPUMS (American Community Survey)

# Affordability for whom?

- Labor market returns are often called out as the primary factor in a student's return on higher education investment
- While closing attainment gaps will generally move underrepresented students toward increased earnings, the returns to their efforts and access to upward mobility are not always equitable

# TALENT READY UTAH

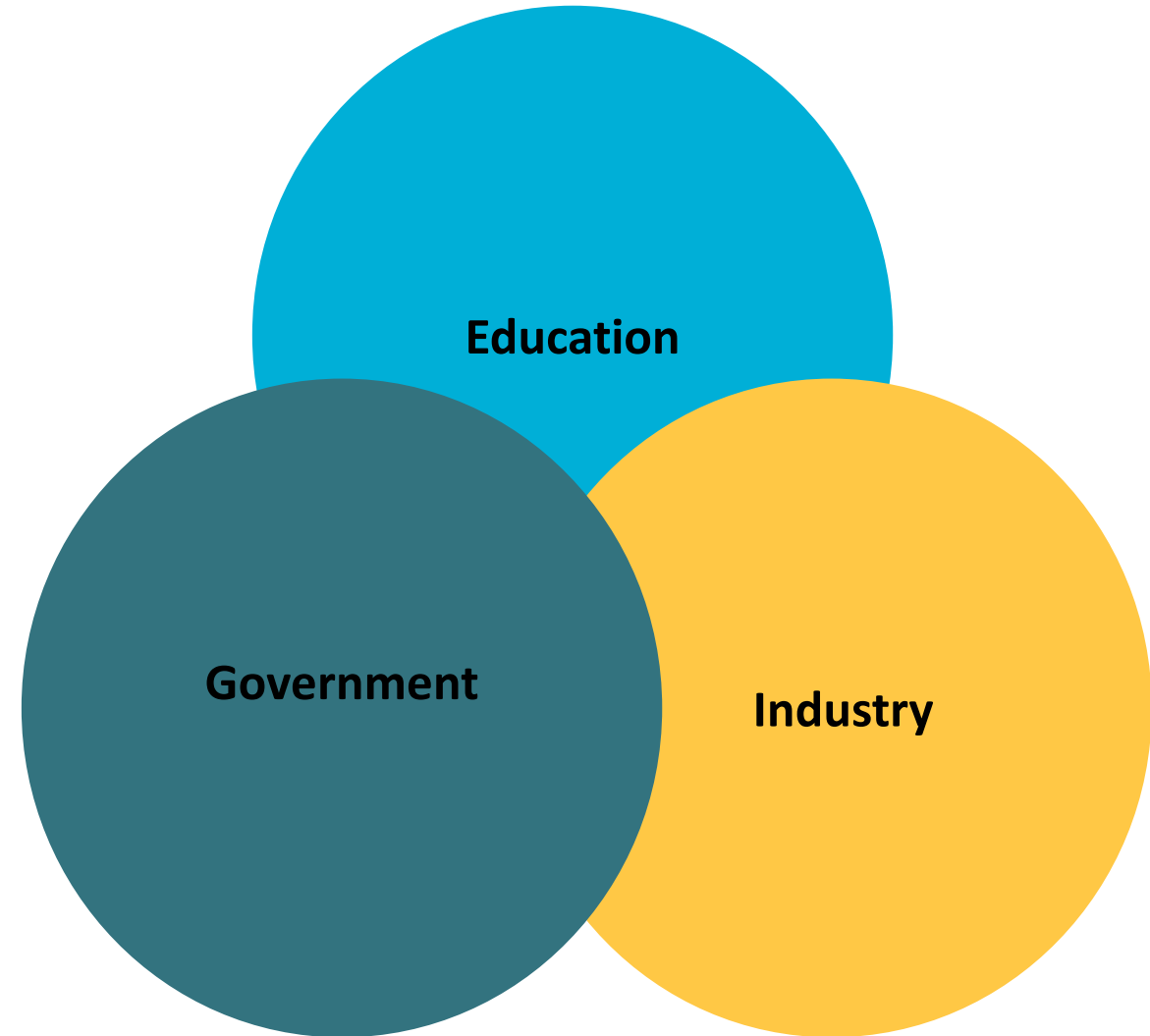
Vic Hockett, Associate Commissioner



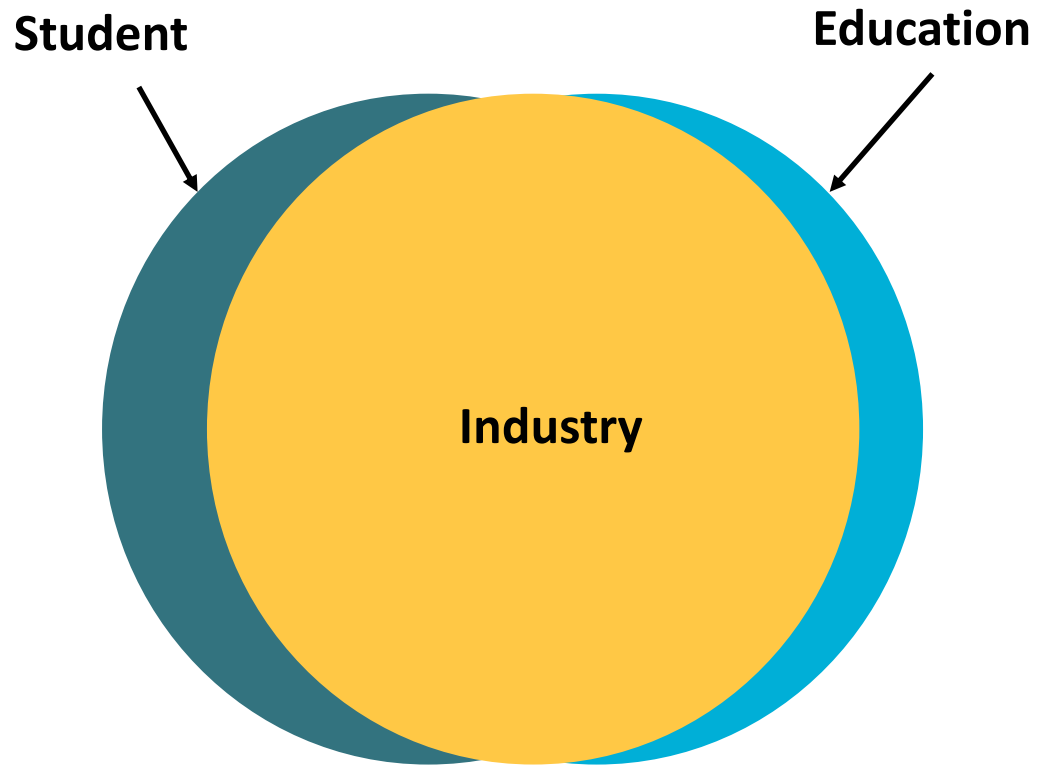
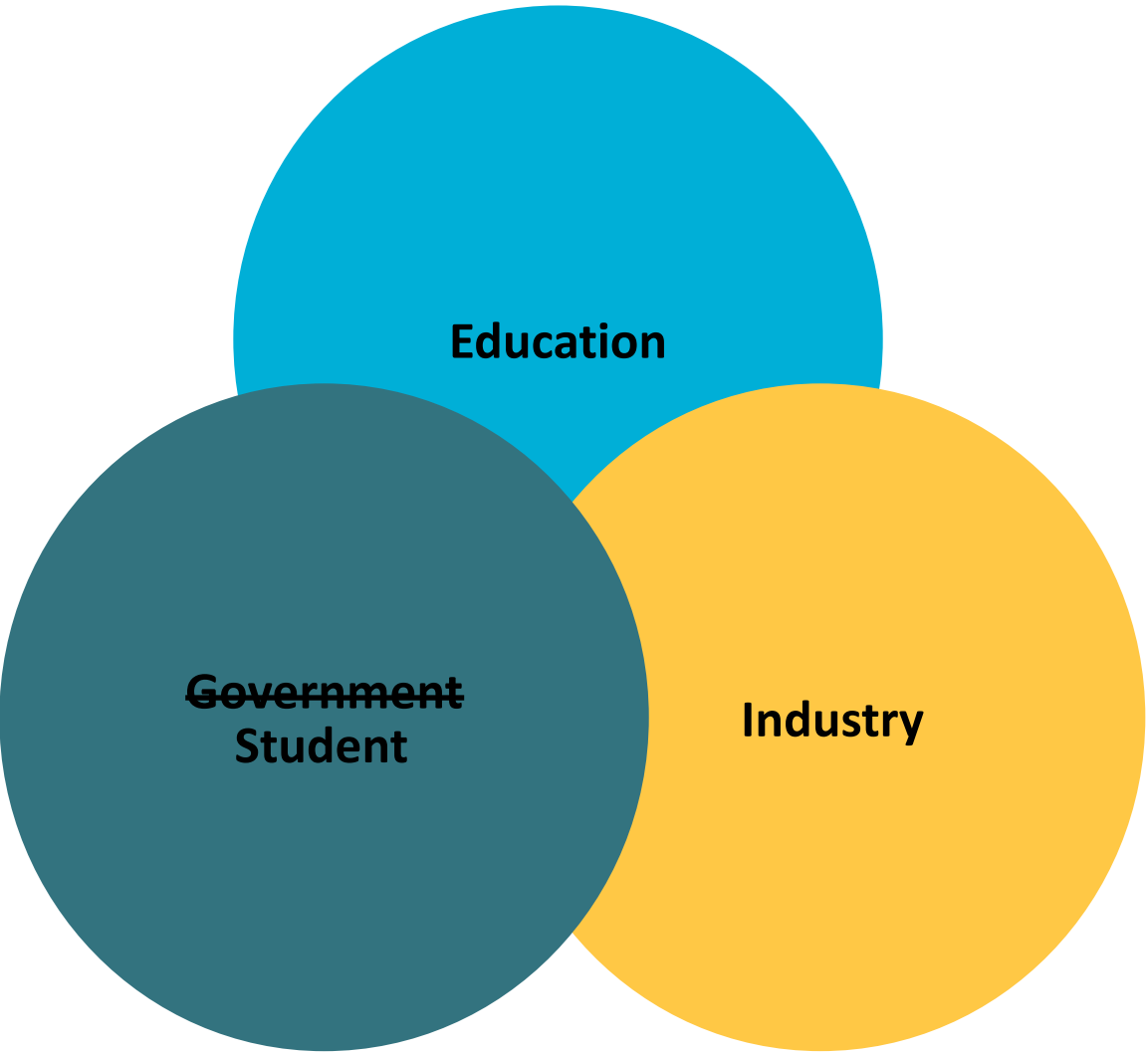
# Mission & Purpose

**Talent Ready Utah**, housed in USHE, was legislatively created in the Governor's Office of Economic Opportunity to be an industry-facing department to collaborate with industry and education to align educational programs to workforce demands.

Our role is to engage with and convene industry, education, and other stakeholders to create, expand, and align short-term and long-term workforce training & education solutions.



# Alignment





# Talent Ready Utah Programs

## Higher Education Programs

- Learn & Work
- Utah Works
- Return-To-Work
- Talent Ready Connections
- Healthcare Workforce Initiative
- Emerging Tech / Deep Tech
- Targeted Workforce Development\*
  - Healthcare
  - Computer Sciences

## K-12 Programs

- Utah Adopt-A-School
- Talent Ready Pathways
  - Utah Aerospace Pathway
  - Utah Rotor Pathway
  - Utah Diesel Tech Pathway
  - Medical Innovation Pathway
  - Utah's Architecture, Engineering, & Construction Pathway
- Computer Science Master Plan
- Computer Science for Utah Grants

# TARGETED WORKFORCE DEVELOPMENT

FY24 Legislative Session

# 2023 Legislative Session

## **Targeted Workforce Development – Computer Sciences – 42% Growth**

- \$5.5M ongoing – Governor’s Budget
- \$4.5M ongoing – Higher Ed Appropriations
- \$4.5M ongoing - EAC

## **Targeted Workforce Development – Healthcare Programs – 27%**

- \$6M ongoing – Governor’s Budget
- \$4.5M ongoing – Higher Ed Appropriations
- \$4.5M ongoing – EAC

## **Targeted Workforce Development – CDL – 26%**

- \$500K ongoing – Governor’s Budget
- \$500K ongoing – BEDL

# 2023 Legislative Session

## **HB 555 – Talent Ready Utah Modifications**

- Workers Compensation Medical Benefit & Liability
- Provides funding for a Talent Ready Utah position
  - USHE to serve as Apprenticeship Intermediary
  - Position focused on expanding and sustaining programs

## **Computer Science For Utah – K12**

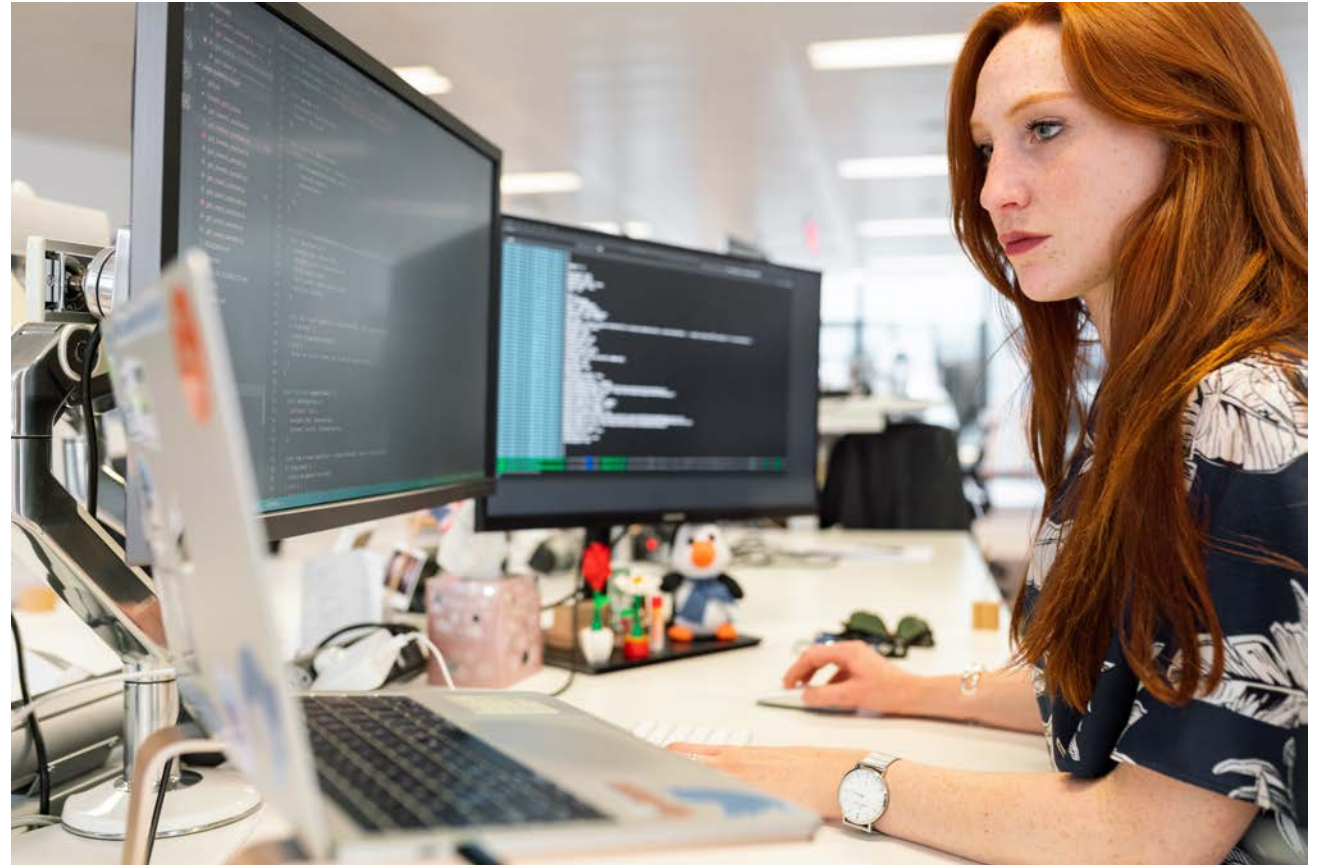
- \$8M ongoing – Governor’s Budget
- \$3M ongoing – Public Ed Appropriations
- \$3M ongoing, \$5M one-time – EAC

# Computer Science for Utah

**Requested:**  
\$8M on-going

**Approved:**  
\$3M on-going  
\$5M one-time

- **Representative Moss**
- Vic Hockett – Talent Ready Utah



# CONGRESSMAN BURGESS OWENS

\$1.25M One-Time for Healthcare Equipment

# FEDERAL INITIATIVES

- BioMADE and DoD
- Hydrogen Hubs
- Build Back Better
- NSF Engines / ASPIRE USU
- EDA / TRU & Innovation Point
- DOE State Energy Program
- Pell Grant Eligibility

# THANK YOU



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TALENT READY UTAH



# POTENTIAL GAINS IN AFFORDABILITY FROM REACHING 5-YEAR PERFORMANCE GOALS

March 24, 2023



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# Five-Year Goals

## **Systemwide Access Goal**

- Base Year 2022 = 53.65%
- Five Year Goal = 56.65%

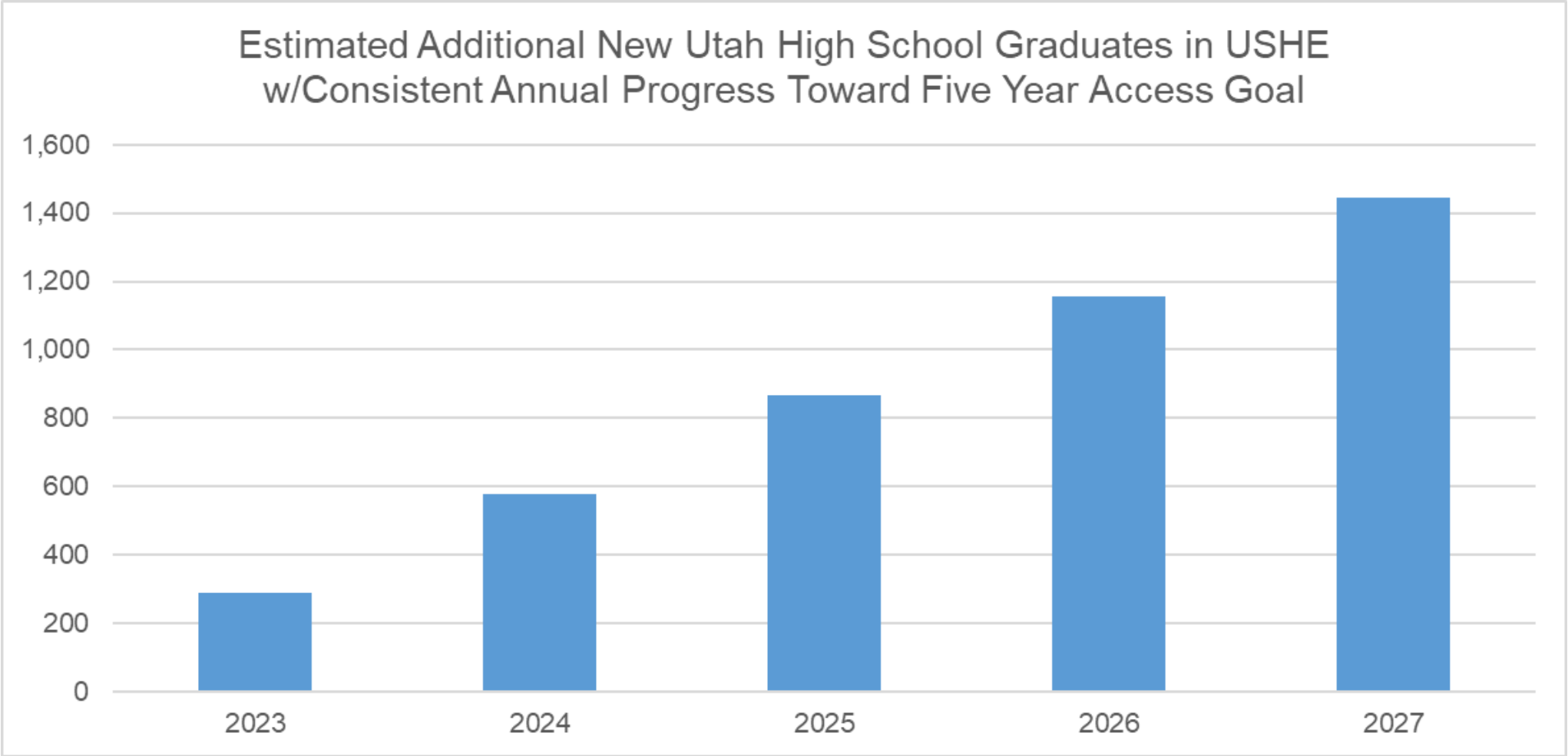
## **Systemwide Timely Completion Goal**

- Base Year 2022 = 48.09%
- Five Year Goal = 51.09%

## **Systemwide High Yield Award Goal**

- Base Year 2022 = 71.27%
- Five Year Goal = 74.27%

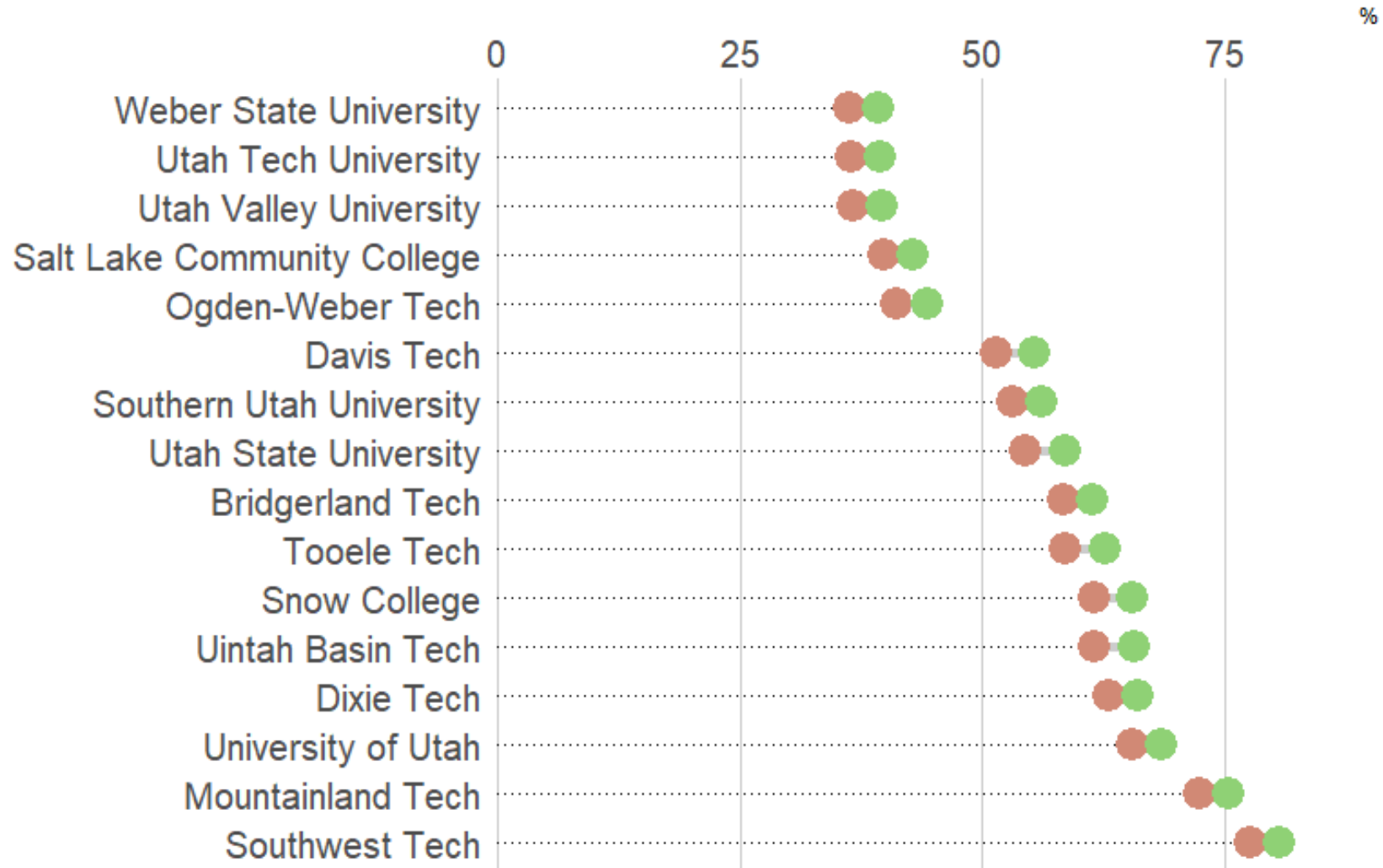
# Five-year Goal - Access



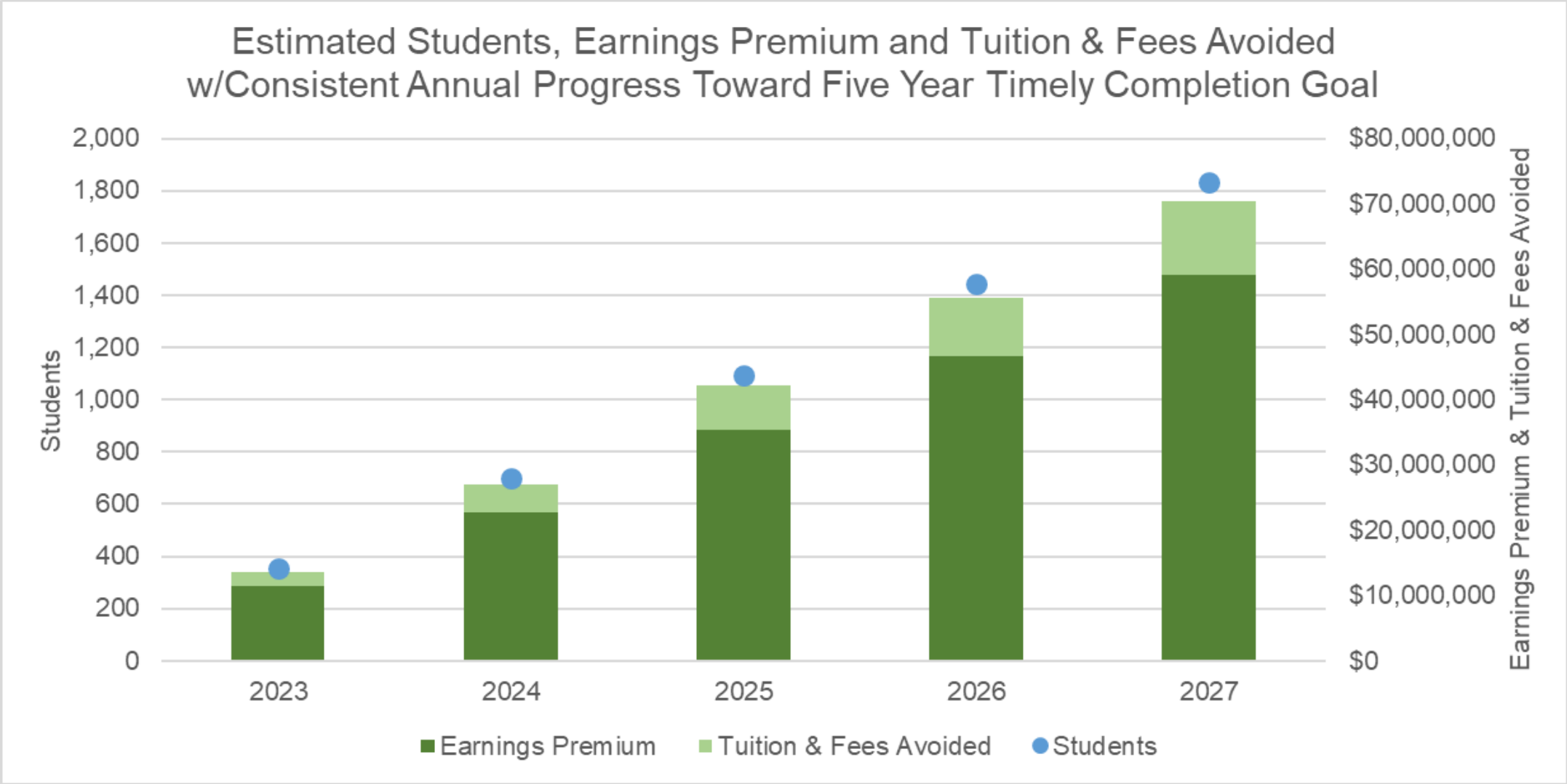
**More than 4,000 students** over the five-year period relative to constant 2022 base year %.

# Timely Completion Five Year Goals (%)

● 2022 Base ● 2027 Goal



# Five-year Goal – Timely Completion

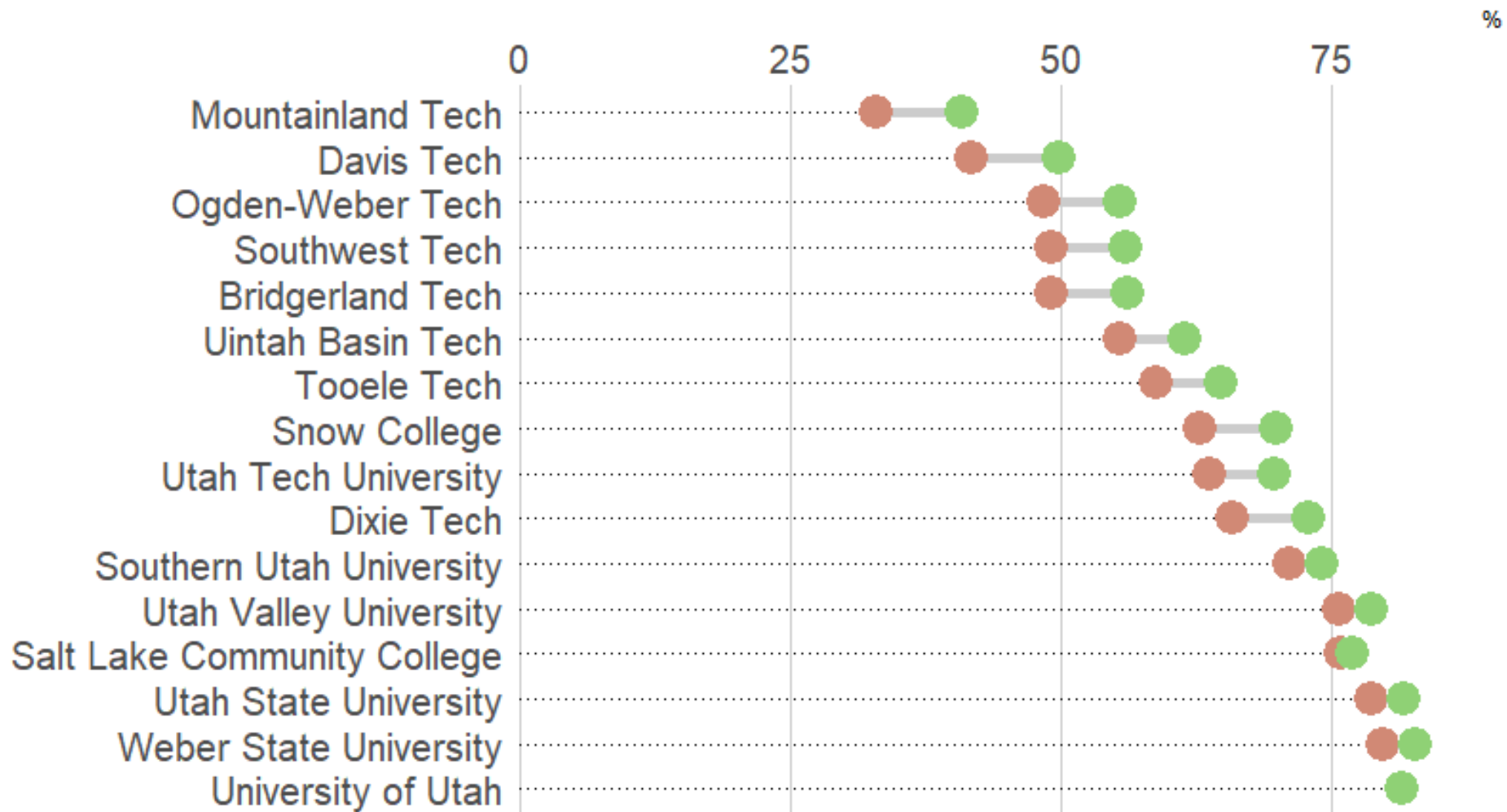


**More than \$200M** in earnings premium and cost avoidance over the five-year period relative to constant 2022 base year %.

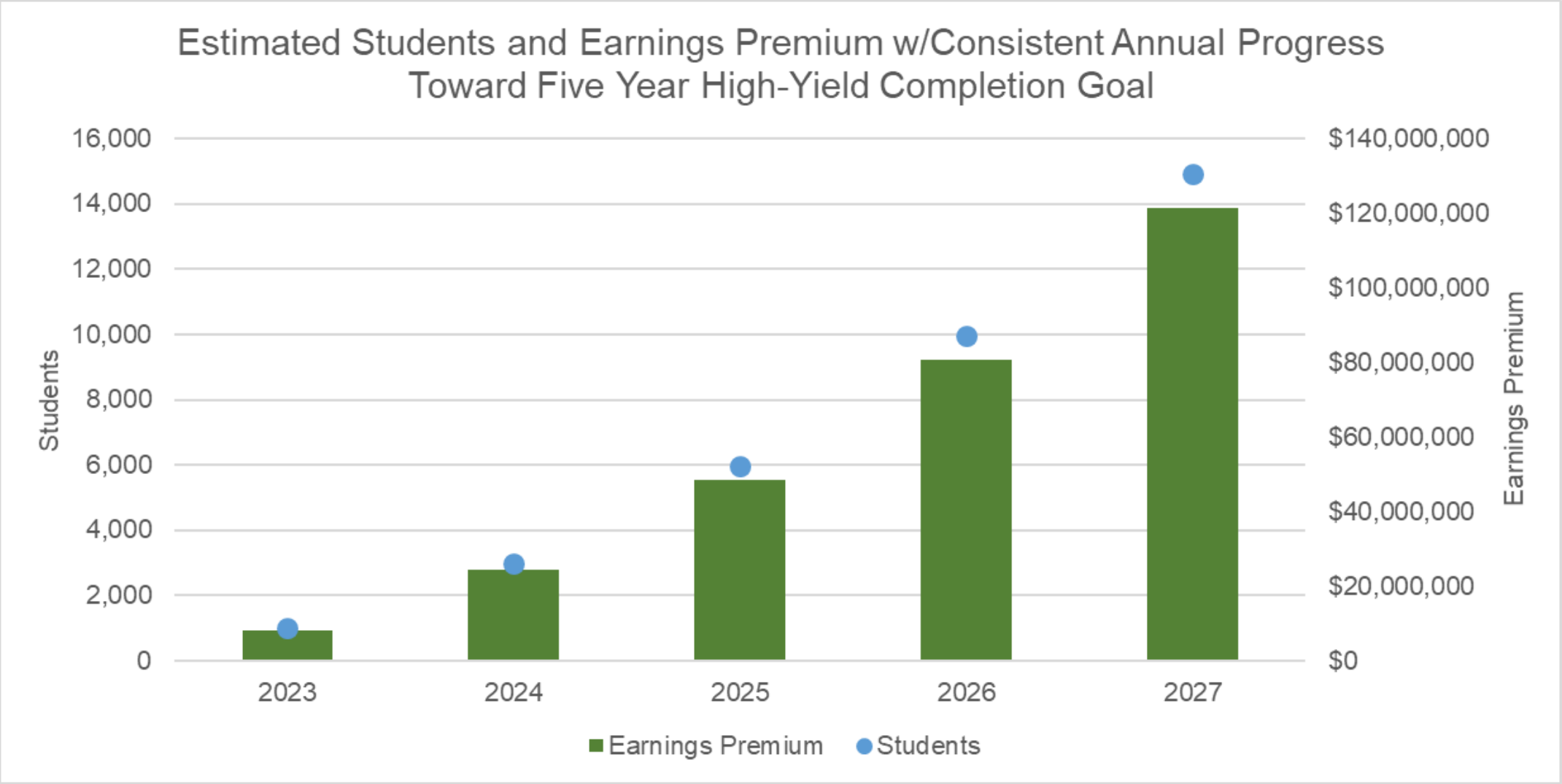
Source: Launch my Career median annualized earning premium  
 Note: Assumes 1 year of in-state tuition & fees avoided by completing on time.

# High Yield Five Year Goals (%)

● 2022 Base ● 2027 Goal



# Five-Year Goal – High Yield Awards



**More than \$280M** in earnings premium over the five-year period relative to constant 2022 base year.

Source: Launch my Career median annualized earning premium

# Summary

USHE five-year performance goals offer the potential for considerable gains in student affordability over the five-year performance period assuming incremental annual progress toward goal targets.

- **Access:** +4,000 additional Utah high school graduates enrolled in USHE institutions over the five-year period.
- **Timely Completion:** +5,400 additional students completing programs on time, with \$175 million in earnings premiums and \$33 million in tuition and fee cost avoidance over the five-year period.
- **High Yield:** +15,000 additional students graduating in high-yield programs, with \$280 million in earnings premiums over the five-year period.



# Training by the numbers



**~200 educators**  
attended a FAFSA webinar



**305 educators**  
attended a FAFSA Bootcamp



**54 college access advisers**  
attended a two-week in-person  
summer training



**452 educators**  
attended a statewide training:  
preparing, applying & paying for  
college

# Impact of College Adviser FAFSA Training



**48+ college access advisers**  
volunteered at a FAFSA Night



**5075**  
assistance in filling out the FAFSA



**71 FAFSA Nights events**  
had college adviser support



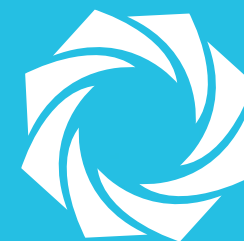
**~2385 students**  
helped by a college adviser at a  
FAFSA Night



**1 FAFSA Night to 2 college advisers**  
present to help students complete the FAFSA



# USHE INSTITUTION WAIVER USE



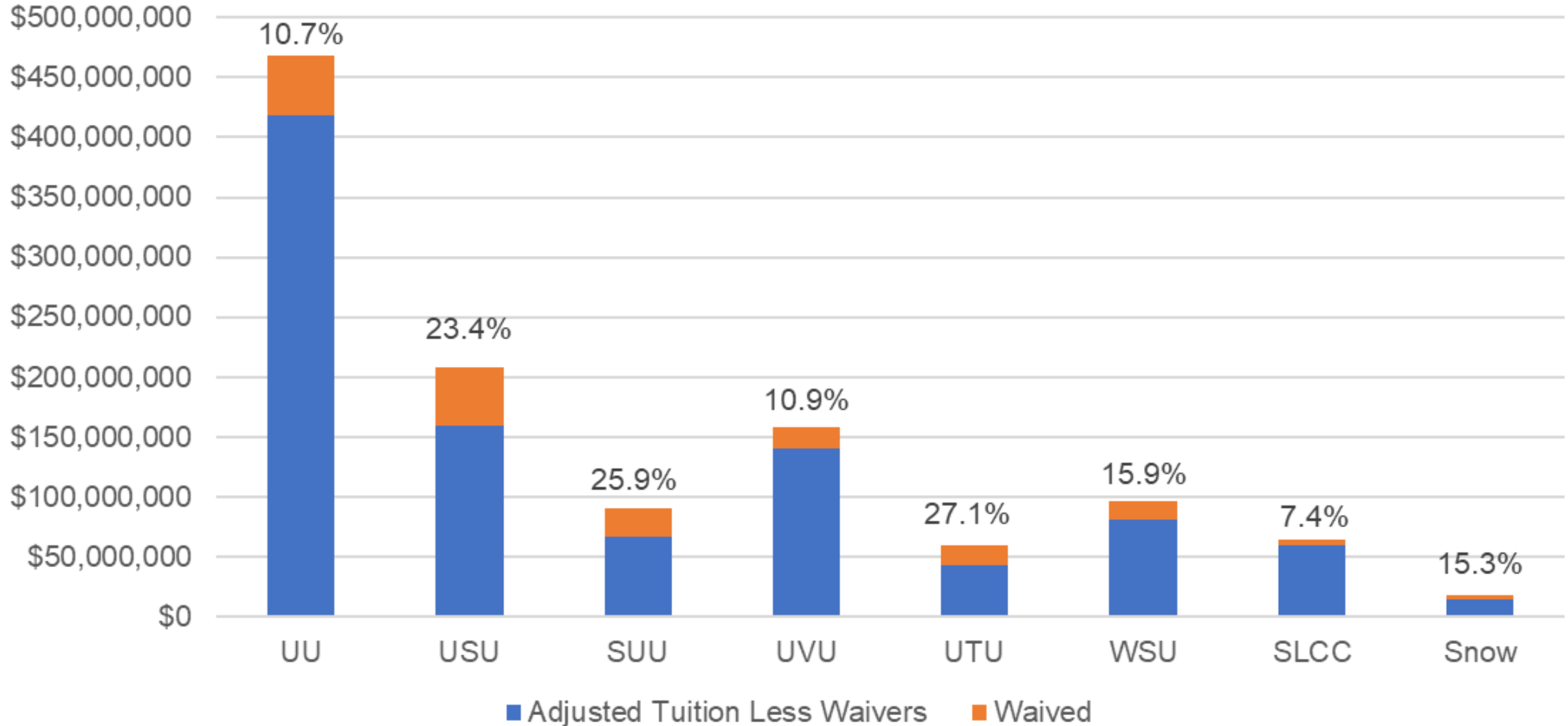
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# USHE Institution Waiver Use

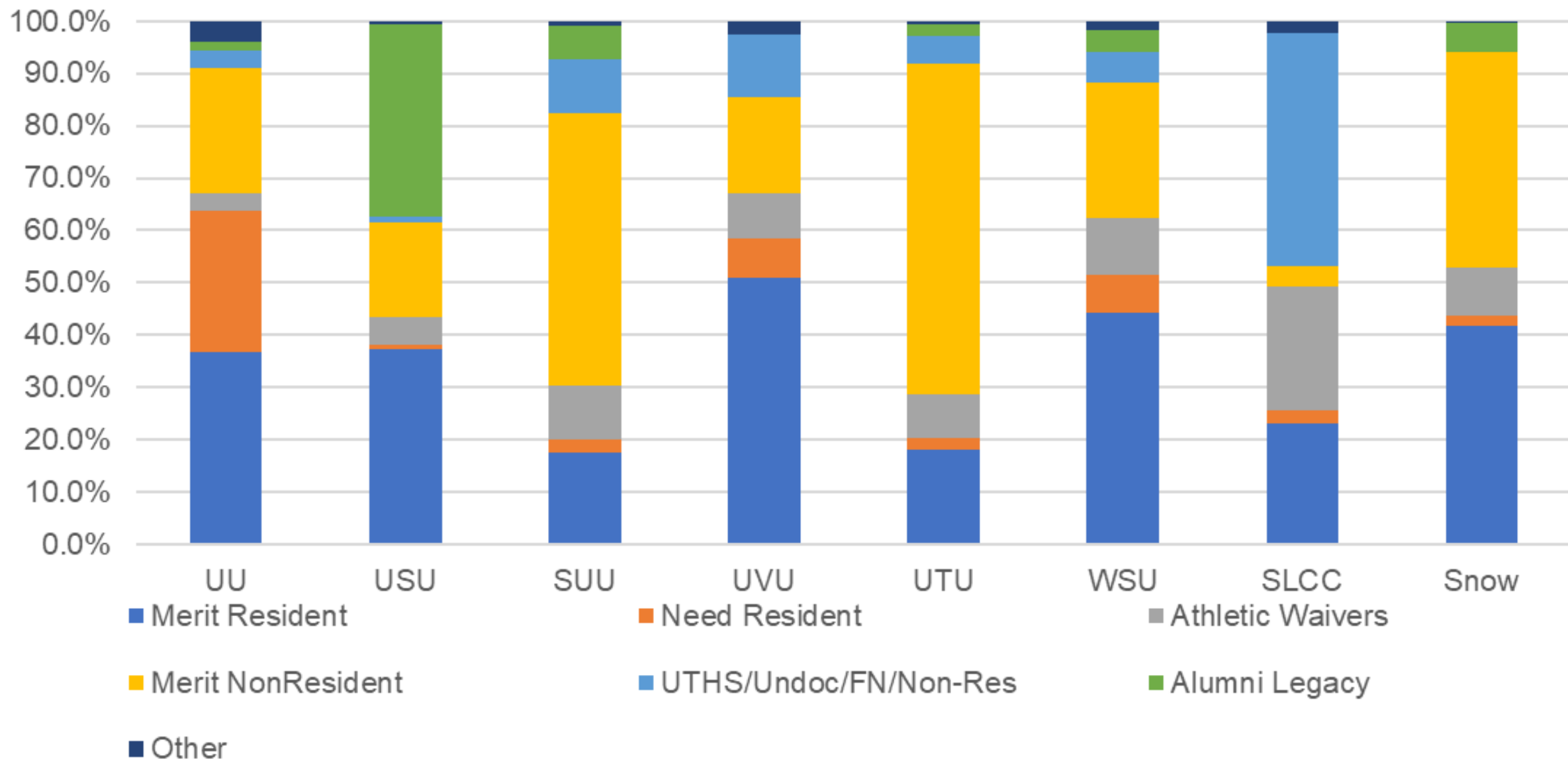
- USHE institutions reported waiving approximately \$178.3 million—or 18.1 percent of adjusted gross tuition—during fiscal year 2022.
- Utah Code 53B-8 establishes 18 types of tuition waivers institutions available to institutions.

Waiver	Degree Granting Institutions	Technical Colleges	Total
10% Resident Waiver	\$ 78,875,520	\$ 244,061	\$ 79,119,581
Meritorious	\$ 61,350,195	\$ 73,064	\$ 61,423,259
Impecunious (Need Based)	\$ 17,525,325	\$ 170,997	\$ 17,696,322
National Guard	\$ 1,143,931	\$ 921	\$ 1,144,852
Senior Citizen	\$ 2,160,778	\$ -	\$ 2,160,778
Public School Teachers	\$ 633	\$ -	\$ 633
Fallen Soldiers Dependents (Scott B Lundell)	\$ 48,426	\$ -	\$ 48,426
Police/Firefighter Survivor	\$ 14,015	\$ -	\$ 14,015
Wards of the State	\$ 1,318	\$ -	\$ 1,318
Purple Heart	\$ 45,263	\$ -	\$ 45,263
Athletic Waivers	\$ 12,425,736	\$ -	\$ 12,425,736
Merit Non-Resident Undergraduate	\$ 45,762,820	\$ -	\$ 45,762,820
Merit Non-Resident Graduate	\$ 5,890,636	\$ -	\$ 5,890,636
Dixie Good Neighbor Waiver	\$ -	\$ -	\$ -
Border Waiver	\$ 2,604	\$ -	\$ 2,604
Reciprocal Agreement	\$ -	\$ -	\$ -
UT High School Graduates- Undocumented	\$ 6,748,575	\$ -	\$ 6,748,575
UT High School Graduates- Certain Foreign Nationals	\$ 575,135	\$ -	\$ 575,135
Non-Resident Transition Waivers (HB 75)	\$ 3,113,490	\$ -	\$ 3,113,490
Alumni Legacy Scholarships	\$ 21,495,071	\$ -	\$ 21,495,071
<b>Total Waivers</b>	<b>\$ 178,303,952</b>	<b>\$ 489,043</b>	<b>\$ 178,792,995</b>

## Net and Waived Tuition by Institution (% Waived)



## Institution Tuition Waived by Type



# Merit-Based Scholarship Student Outcomes

March 24, 2023





# Scholarships and Affordability

- Scholarships are a primary lever for the Board to affect affordability for Utah students lowering costs for students
- Regents' scholarship, created in 2008, was a merit-based scholarship administered by USHE
- Robust data history supports research on outcomes for students who received the scholarship.
- Understanding outcomes can inform return on investment, another key component of assessing affordability.

# Research Framework

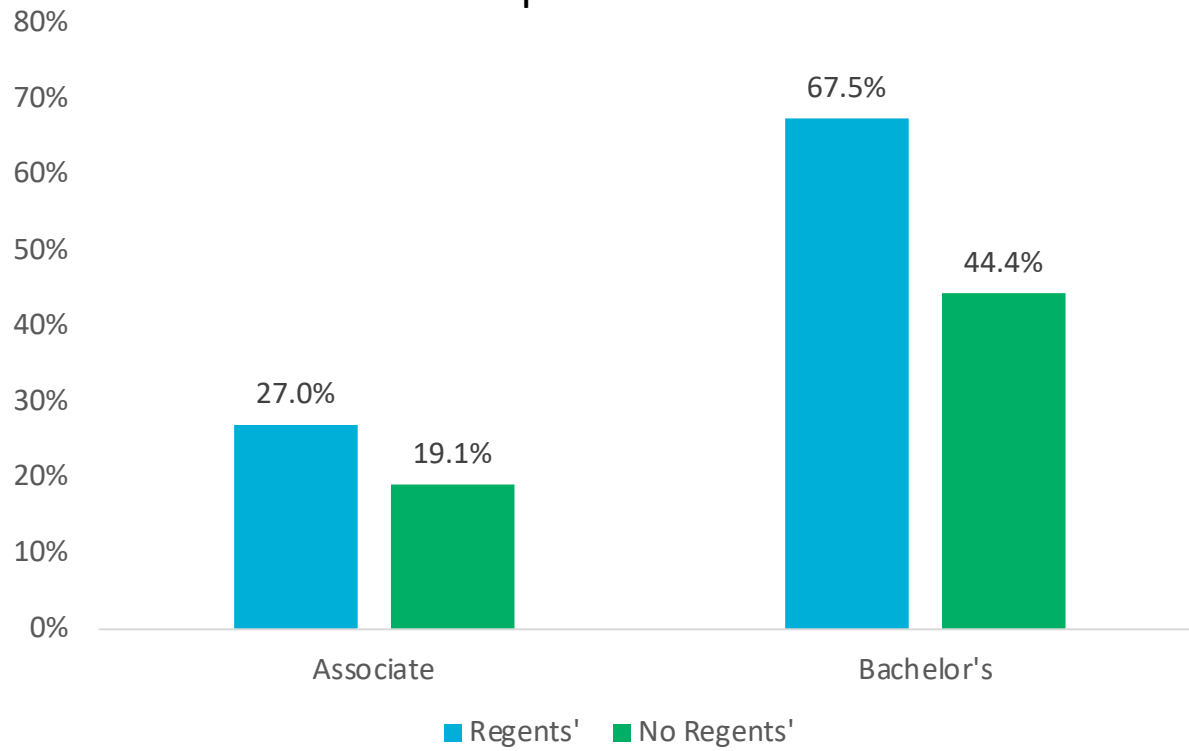
- Propensity score matching: race, gender, ACT score for students in 2015 and 2016 Regent's cohorts
- Comparing students of similar race, gender, and college readiness to isolate scholarship's effects on student outcomes
- One-to-one matched sample of 5,604 students

# Completions

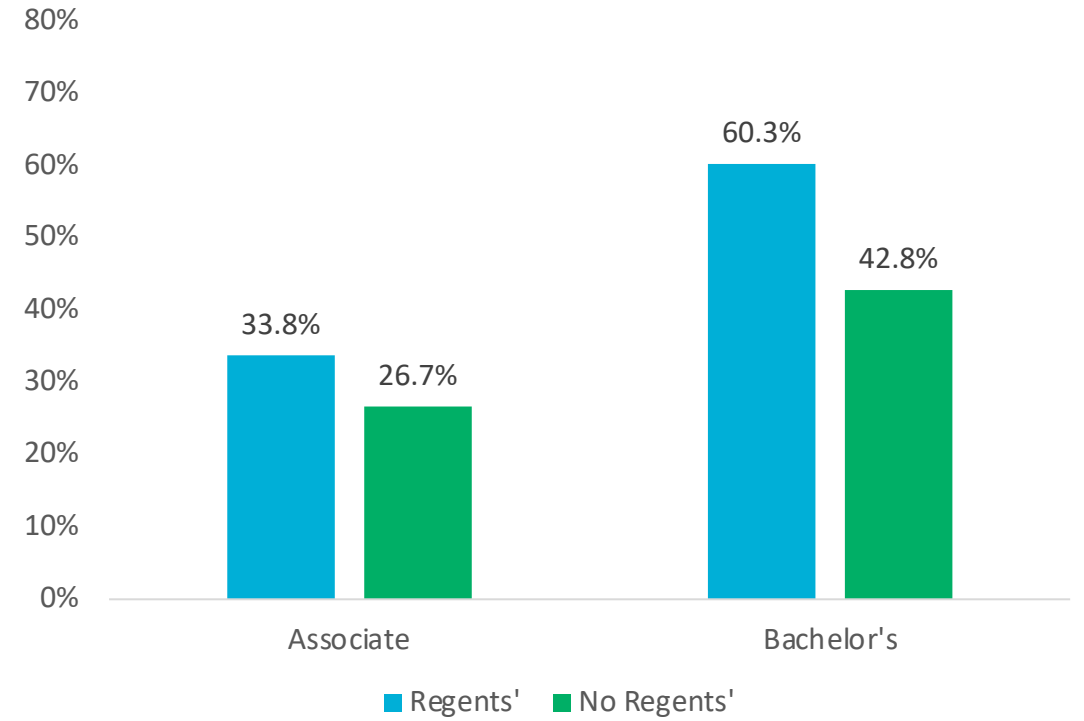
	Regents'		No Regents'		Totals	
<b>Associate Degree</b>	948	28.4%	747	23.6%	1,695	26.1%
<b>Bachelor's Degree</b>	1,691	50.7%	1,198	37.8%	2,889	44.4%
<b>No Degree</b>	698	20.9%	1,222	38.6%	1,920	29.5%

# Completions

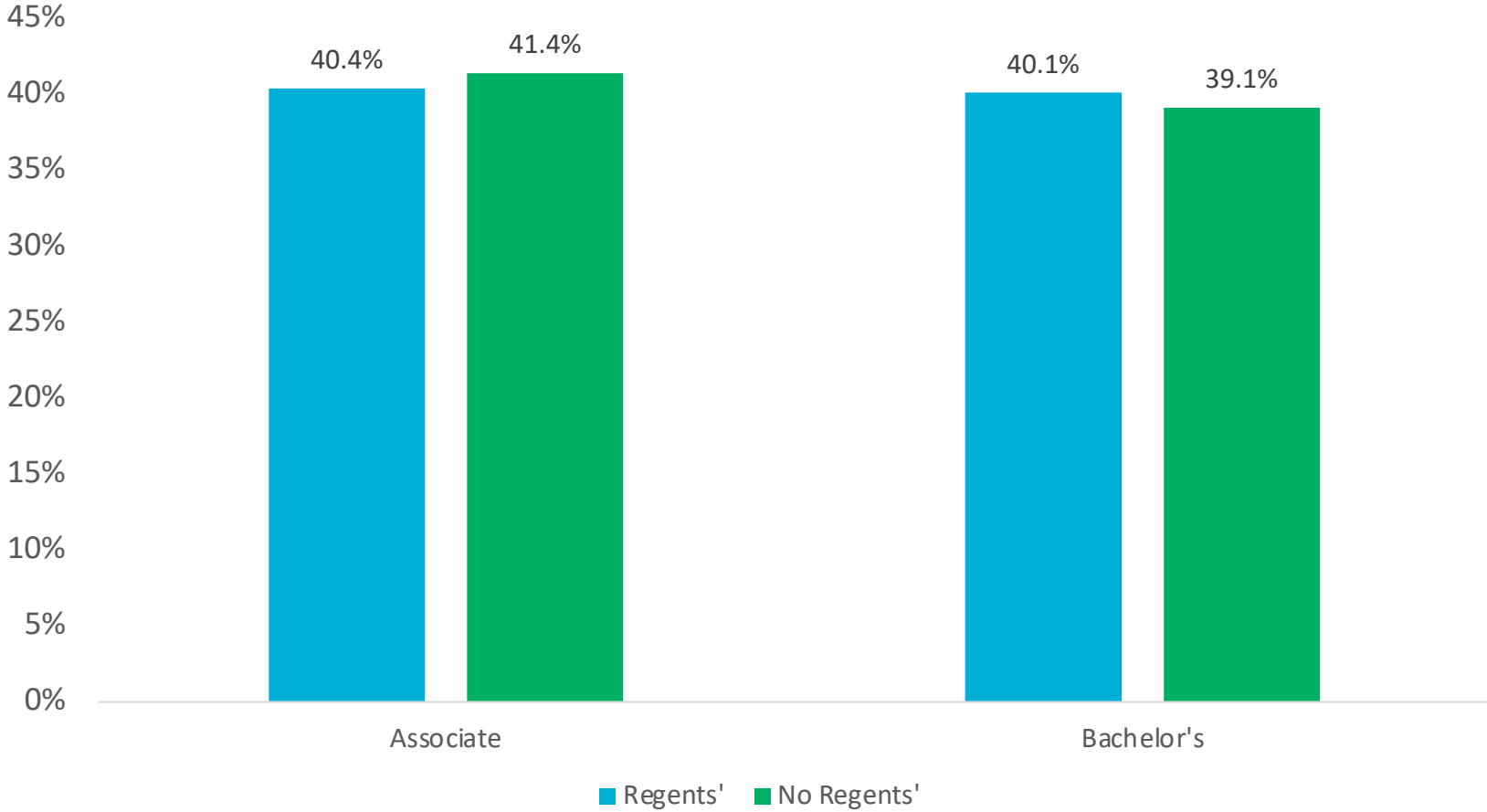
## Underrepresented Students



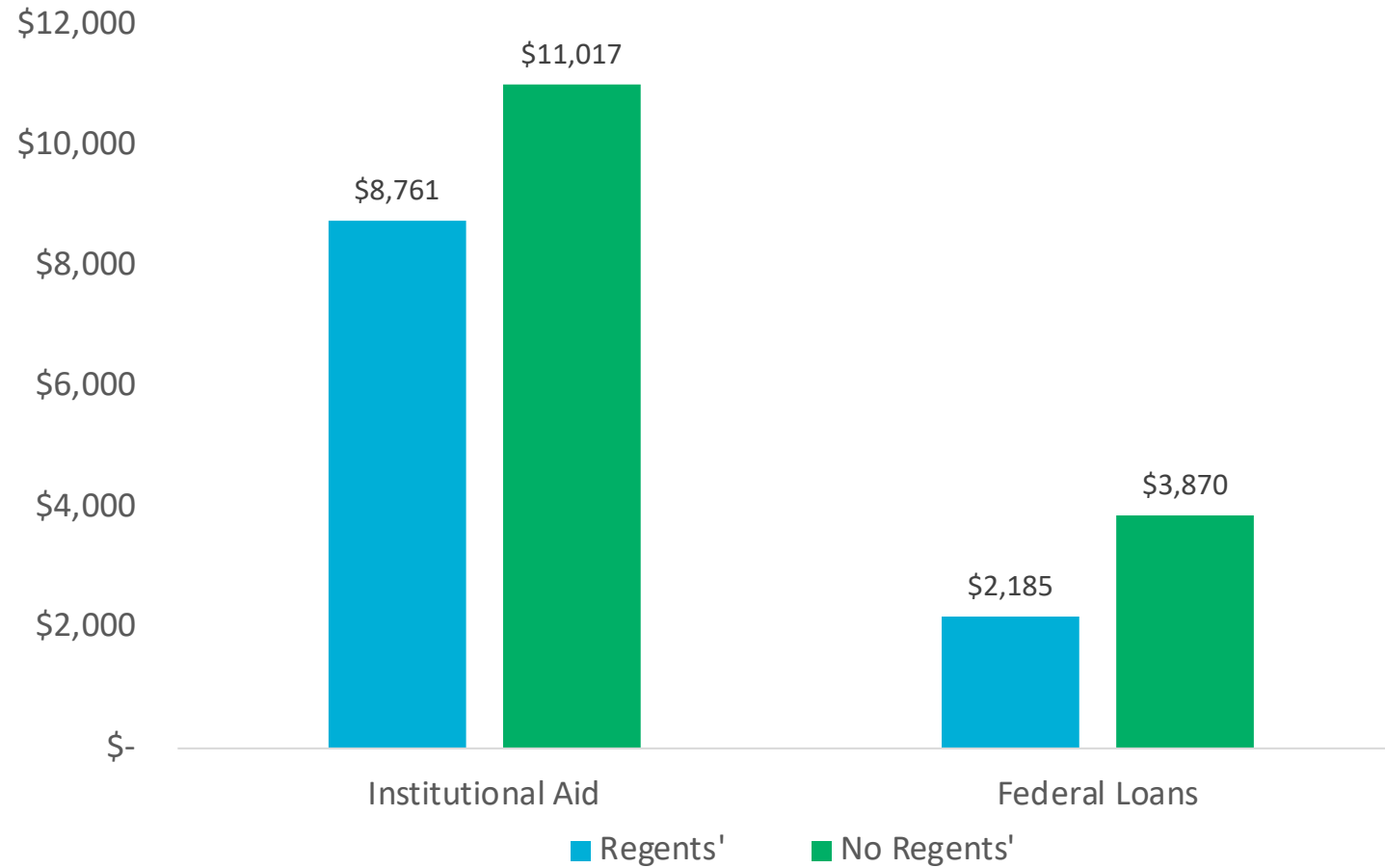
## All Students



# Timely Completions



# Financial Support



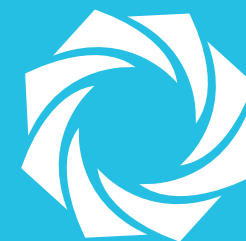
## Summary

- More Regents' recipients earned associate and bachelor's degrees compared to similar students.
- Regents' recipients received less in federal loans and less in institutional financial support.
- Effects on timely completion are small for bachelor's degrees and small but negative for associate degrees
- Underrepresented students who received Regents' earned a degree.





# Board Scholarships Allocation Options



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# Scholarship Comparison: Opportunity & Promise

	Opportunity Scholarship	Promise Scholarship
<b>Program Type</b>	<b>Merit</b>	<b>Need</b>
Program Administration	Commissioner's Office	Institution
Eligible Uses	Tuition and fees	Cost of attendance
Award Length	4 semesters	4 years*
Renewal Requirement	3.0 GPA	Continued financial need
Available Funds (FY 2024)	\$17,600,000	\$3,700,000
Est. Students Served (FY 2024)	4,200	2,500

*\*Prior to the passage of H.B. 197 (2023 GS), students were eligible for the Promise Scholarships two years.*

# Board Scholarships Funding Scenarios

## Scenario 1

- Shift \$2 million of ongoing appropriations (OG) from the New Century Scholarship to the Promise Scholarship.

## Scenario 2

- Scenario 1 + Shift \$6 million of one-time appropriations (1x) from the New Century Scholarship to the Promise Scholarship over a three-year period (\$2 million per year).

## Scenario 3

- Pool the \$17.6 million of ongoing appropriations to the Opportunity Scholarship with the \$3.7 million of ongoing appropriations to the Promise Scholarship and equalize ongoing funding for the two scholarships after accounting for ongoing offsets in Scenario 2.

# Statutory Authority for Changes

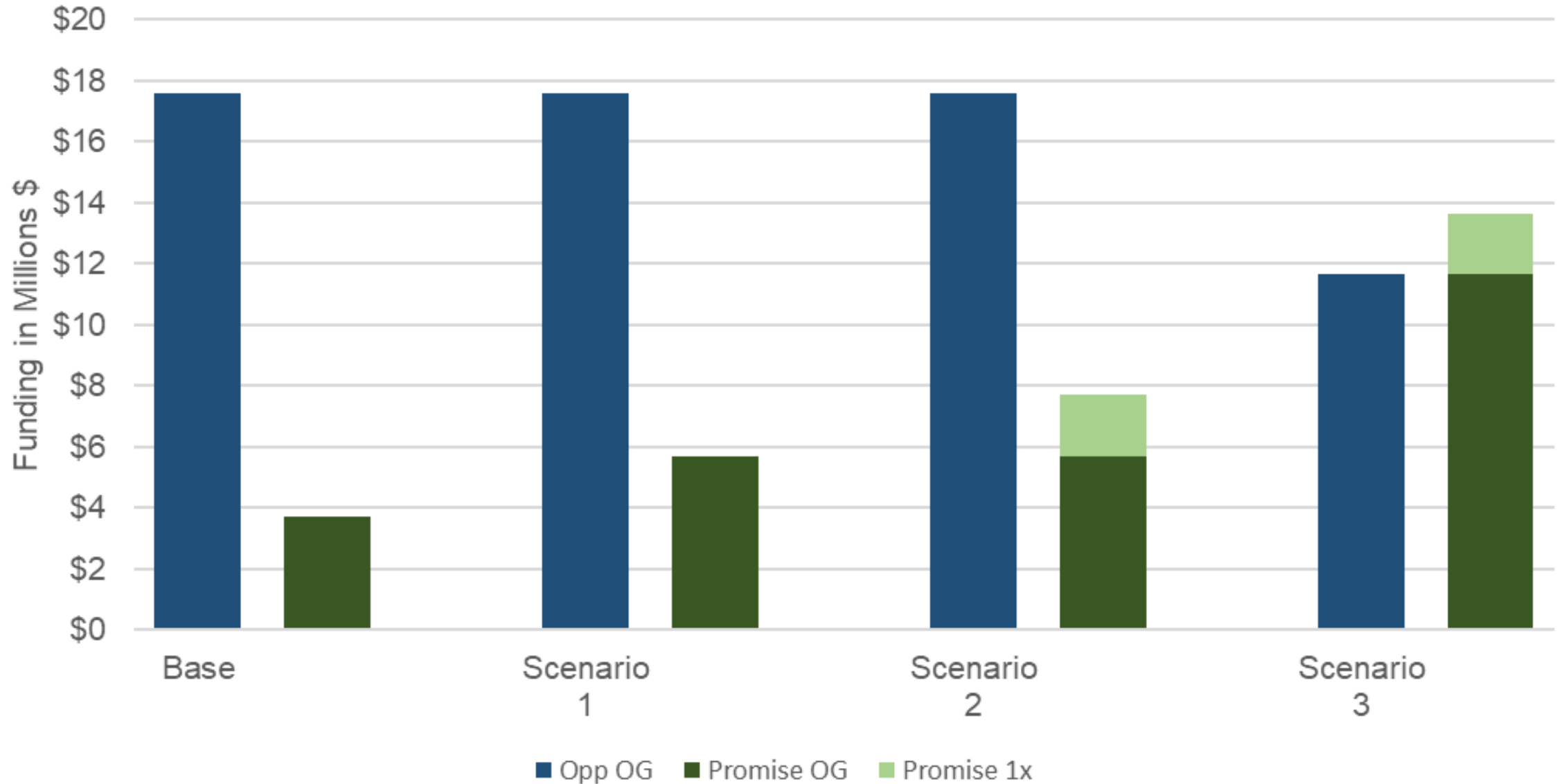
## Scenarios 1 & 2

- *Utah Code* 53B-8-105 allows for the Promise Scholarship program to receive unused New Century Scholarship funds.

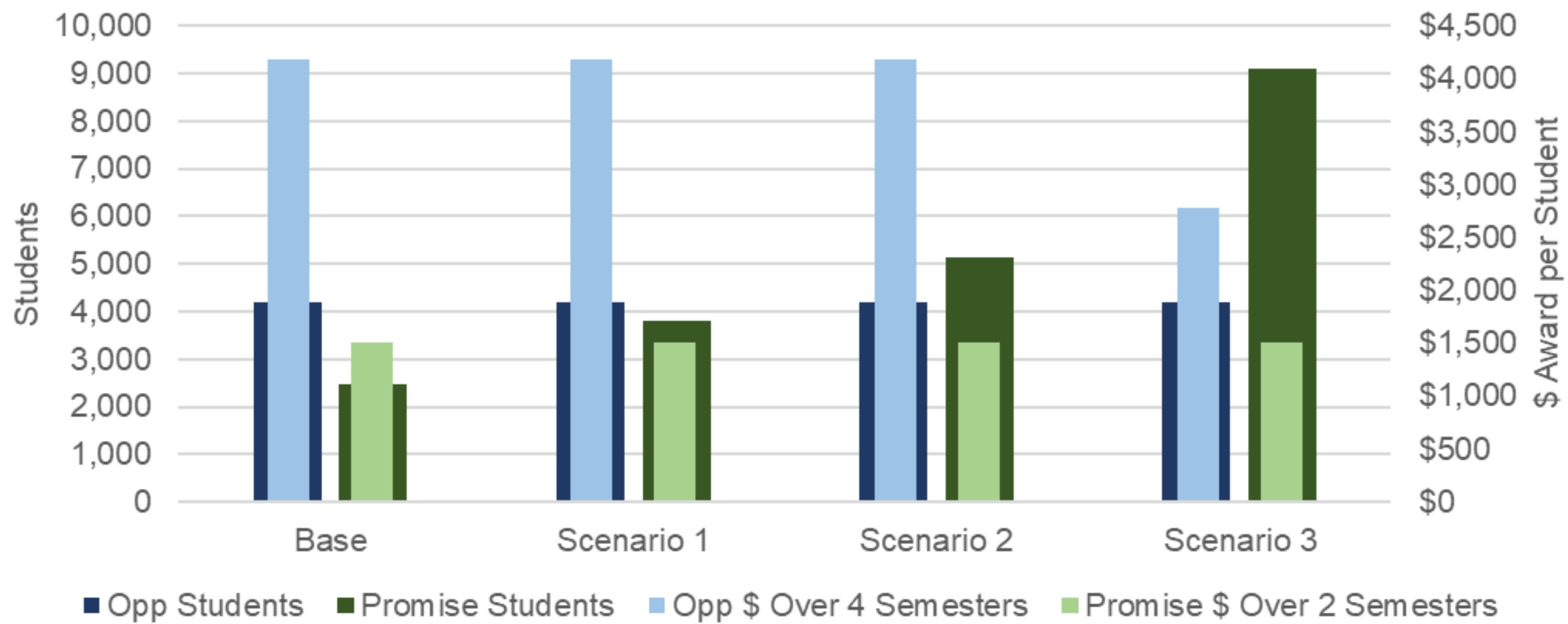
## Scenario 3

- Prior to the 2021 General Legislative Session, *Utah Code* 53B-8-302 allowed for the Board to use unspent Regents' scholarship funding for the Access Utah Promise Scholarship Program.
- Senate Bill 136 of the 2021 GS repealed this language.
- *Utah Code* 63J-1-209 provides generic legal authority for agencies or institutions to move funding between programs within line items upon revision of an agency's or institution's budget execution plan.
- Because transfer authority specific to the Opportunity and Promise Scholarship programs does not exist in code, to the extent the Board is interested in Scenario 3, it may want to consider requesting a legislative change in appropriations to accommodate this action.

# Opportunity & Promise Scholarship Funding Options



# Opportunity & Promise Scholarship Funding Options



# Scholarship Comparison: Opportunity & Promise

	Available Funds		Students Served		Average Award per Student	
	Opportunity	Promise	Opportunity	Promise*	Opportunity**	Promise
<b>Base</b>	\$ 17.5M	\$ 3.7M	4,200	2,500	\$ 4,000	\$ 1,500
<b>Scenario 1</b>	\$ 17.5M	\$ 5.6M	4,200	3,800	\$ 4,000	\$ 1,500
<b>Scenario 2</b>	\$ 17.5M	\$ 7.6M	4,200	5,100	\$ 4,000	\$ 1,500
<b>Scenario 3</b>	\$ 11.6M	\$ 13.6M	4,200	9,100	\$ 2,500	\$ 1,500

\*Assuming qualifying students receive \$1,500 per year. Institutions may use additional funds to increase the amount of a Promise award for qualifying students to cover up to the cost of attendance.

\*\*This estimated Opportunity Scholarship award is contingent on available funding (less administrative costs) divided by the number of qualifying students. A student is eligible for the award for four semesters.

# Summary

- The phaseout of the New Century Scholarship will support an increase of \$2 million of new ongoing funding and \$6 million of new one-time funding to the Promise Scholarship. The one-time funding could be allocated over one or more years.
- Further increases in funding to the Promise Scholarship could come from existing funding for the Opportunity Scholarship, although transferring existing funding between those programs may require legislative action.
- The Board could explore other funding sources to increase Promise Scholarship funding, such as new requests for appropriations, endowments, etc.