



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

January 4, 2023

Revision to and Renaming of Board Policy R506, *Guidance on Categorizing Budget Related and Self Supporting Courses*

The Board's Strategic Plan priority of Affordability includes a tactic to create a standardized cost structure model to compare the cost of delivering credentials across USEH institutions. One of the steps to accomplish this goal includes reviewing the budget codes contained in existing Board Policy R506, *Inventory of Budget Related and Self-Supporting Courses*. These budget codes need to be updated and revised to better capture technical education, particularly as technical colleges begin to offer courses in a credit-hour model. Other budget codes need to be reviewed and updated for better consistency and use of current terminology.

These proposed policy revisions authorize the Office of the Commissioner of Higher Education (OCHE) to collect the data necessary to develop a cost study. The policy revision authorizes OCHE to develop, revise, and update the budget codes as necessary by adding the required codes to the existing data codes, which the OCHE Data Team maintains. This flexibility will allow OCHE to keep these codes current and relevant.

Commissioner's Recommendation

The Commissioner recommends the Committee approve the proposed revisions to Board Policy R506, *Guidance on Categorizing Budget Related and Self-Supporting Courses*, and forward to the full Board for final approval.

Attachments

R506, Guidance on Categorizing Budget Related and Self Supporting Courses¹

R506-1 Purpose: To provide a policy for categorizing courses as budget-related or self-supporting for state funding purposes and for cost studies.

R506-2 References

- 2.1 [Utah Code § 53B-1-101.5](#), Definitions
- 2.2 [Utah Code § 53B-2a-106](#), Technical Colleges – Duties
- 2.3 [Utah Code Title 53B, Chapter 2a, Part 2](#), Technical Education at Degree-granting Institutions
- 2.4 [Utah Code § 53B-7-101](#), Combined Requests for Appropriations – Appropriation Formulas
- 2.5 [Board Policy R501](#), Budgeting Definitions and Guidelines
- 2.6 [Board Policy R315](#), Service Area Designations and Coordination of Off-Campus Courses and Programs

R506-3 Policy: The Office of the Commissioner of Higher Education (“OCHE”) will develop guidance for institutions of higher education for categorizing budget-related and self-supporting courses (“Guidance”). The Guidance shall detail the data institutions shall provide to OCHE for such courses, how to define the data elements, and how to properly format the data.

3.1 Supervised Instruction: For a course to be included in the USHE Course Inventory, the course must include instruction, and the institution must supervise the instruction.

3.2 Separate Designation for Credit and Not for Credit Courses: Whenever a specific course offering can be taken either for credit or not for credit, the different registration categories must be provided by separate section numbers scheduled at the same time and location.

¹ Approved September 12, 1997, revised August 7, 1998, amended April 20, 2001, March 14, 2002, March 10, 2006, October 26, 2006, September 26, 2014, and XXX.

R506, ~~Inventory of~~Guidance on Categorizing Budget Related and Self Supporting Courses¹

R506-1 Purpose: To provide ~~a policy for categorizing guidance and uniformity to the categorization of~~ courses as budget-related or self-supporting for state funding purposes ~~and for cost studies~~.

R506-2 References

~~2.1~~ Utah Code § 53B-1-101.5, Definitions

~~2.2~~ Utah Code § 53B-2a-106, Technical Colleges – Duties

~~2.3~~ Utah Code Title 53B, Chapter 2a, Part 2, Technical Education at Degree-granting Institutions

~~2.41~~ Utah Code § 53B-7-101, (Combined Requests for Appropriations – Appropriation Formulas)

~~2.52~~ Board Policy and Procedure R501, Budgeting Definitions and Guidelines

~~2.63~~ Board Policy and Procedure R315, Service Area Designations and Coordination of Off-Campus Courses and Programs

~~2.4~~ Enrollment Category Decision Tree

R506-3 ~~Utah System of Higher Education Course Inventory~~Policy: The Office of the Commissioner of Higher Education (“OCHE”) will develop guidance for institutions of higher education for categorizing budget-related and self-supporting courses (“Guidance”). The Guidance shall detail the data institutions shall provide to OCHE for such courses, how to define the data elements, and how to properly format the data.

3.1 Supervised Instruction: For ~~a~~ courses to be included in the USHE Course Inventory, the course must include instruction ~~must occur~~, and the institution must supervise the instruction.

3.2 Separate Designation for Credit and Not for Credit Courses: Whenever a specific course offering can be taken either for credit or not for credit, the different registration categories ~~are to~~ must be provided by separate section numbers scheduled at the same time and location.

¹ Approved September 12, 1997, revised August 7, 1998, amended April 20, 2001, March 14, 2002, March 10, 2006, October 26, 2006, ~~and~~ September 26, 2014, and XXX.

~~R506-4 Budget-Related Courses for State Funding Purposes~~

~~4.1 Budget-Related Regular (BA): (course must meet all of the following criteria)~~

- ~~• Course is for credit.~~
- ~~• Course is not offered at a high school site or is offered at a high school site but is not a concurrent enrollment course.~~
- ~~• Board approved tuition is assessed.~~
- ~~• All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear marked to pay instructor costs).~~
- ~~• Course originates in Utah or is taught through study abroad~~
- ~~• Course section is part of regular curriculum and is taught on a full term basis or equivalent to a full term basis or until a defined competency is achieved.~~
- ~~• Course level is 1000 or above.~~

~~#AND# course must also meet one of the following sets of criteria~~

~~4.1.1 Offered to the general public~~

- ~~• Course section is offered to the general public not primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).~~
- ~~• Course is not a correspondence course.~~
- ~~• Course is not for concurrent enrollment students (i.e. for secondary students concurrently receiving college credit and high school credit).~~

~~#OR#~~

~~4.1.2 Not offered to the general public~~

- ~~• Course section is not offered to the general public and is primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).~~
- ~~• Course was not developed specifically for a particular business or organization.~~
- ~~• Course enrollees are not predominantly non-matriculated employees of the institution.~~

~~4.2 Budget-Related Concurrent Enrollment (BC): (course must meet all of the following criteria)~~

- ~~• Course is for credit.~~
- ~~• Course is a concurrent enrollment course (i.e. for secondary students concurrently receiving college credit and high school credit) and enrollment activity is supported from state concurrent enrollment funds.~~
- ~~• All instructor costs of the course are paid for by the USHE institution.~~
- ~~• Course is taught in Utah.~~

4.3 Budget Related Course Below 1000 (BU): (course must meet all of the following criteria)

- ~~Course is for credit.~~
- ~~Course is not offered at a high school site or is offered at a high school site but is not a concurrent enrollment course.~~
- ~~Board approved tuition is assessed.~~
- ~~All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear marked to pay instructor costs).~~
- ~~Course originates in Utah.~~
- ~~Course section is part of regular curriculum and is taught on a full term basis or equivalent to a full term basis or until a defined competency is achieved.~~
- ~~Course level is below 1000.~~
- ~~Course is taught by an institution with a community college mission (except for CTE courses, which are part of each institution's mission except the University of Utah) or by USU at its branch campuses or continuing education centers after a community college chooses not to exercise its right of first refusal to offer a remedial class.~~

4.4 Budget Related STIT (BV): (course must meet all of the following criteria)

- ~~Course is not for credit.~~
- ~~Course is vocational or pre-requisite to a vocational program.~~
- ~~Course is a short term intensive training course funded with state STIT appropriations.~~

4.5 Budget Related Not for Credit CTE (BY): (course must meet all of the following criteria)

- ~~Course is not for credit.~~
- ~~Course is vocational or pre-requisite to a vocational program.~~
- ~~Course is not a short term intensive training course funded with state STIT appropriations.~~
- ~~Course is not funded by Custom Fit funding (i.e. appropriation made to the institution to support company specific vocational training programs).~~
- ~~Course is creditable towards a Board approved degree/award program or is a pre-requisite to such program.~~

R506-5 Self Supporting Courses for State Funding Purposes

5.1 Self Supporting Regular (SD): (course must meet any one of the following sets of criteria)

5.1.1 Not for credit: Not vocational or vocational pre-requisite

- ~~Course is not for credit.~~
- ~~Course is not vocational or pre-requisite to a vocational program.~~

#OR#

5.1.2 Not creditable towards a Board approved degree/award program

- ~~Course is not for credit.~~
- ~~Course is vocational or pre-requisite to a vocational program.~~
- ~~Course is not a short-term intensive training course funded with state STIT appropriations.~~
- ~~Course is not funded by Custom Fit funding.~~
- ~~Course is not creditable towards a Board approved degree/award program or is a pre-requisite to such program.~~

#OR#

5.1.3 For credit: Board approved tuition not assessed

- ~~Course is for credit.~~
- ~~Board approved tuition is not assessed.~~

#OR#

5.1.4 Instructor costs not paid by institutional funds

- ~~Course is for credit.~~
- ~~Board approved tuition is assessed.~~
- ~~All instructor costs of the course are not paid for by institutional funds (e.g. external funds have been received or ear-marked to pay instructor costs).~~

#OR#

5.1.5 Not taught or originating in Utah or through study abroad

- ~~Course is for credit.~~
- ~~Board approved tuition is assessed.~~
- ~~All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).~~
- ~~Course does not originate in Utah or is not taught in Utah or through study abroad.~~

#OR#

5.1.6 Not part of regular curriculum—not taught on a full-term basis

- ~~Course is for credit.~~
- ~~Board approved tuition is assessed.~~
- ~~All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).~~
- ~~Course originates in Utah or is taught through study abroad.~~
- ~~Course section is not part of regular curriculum or is not taught on a full-term basis or until a defined competency is achieved.~~

#OR#

5.1.7 Not offered to general public

- ~~Course is for credit.~~
- ~~Board approved tuition is assessed.~~

- ~~All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear marked to pay instructor costs).~~
- ~~Course is taught in Utah or through study abroad.~~
- ~~Course section is part of regular curriculum and is taught on a full term basis or equivalent to a full term basis or until a defined competency is achieved.~~
- ~~Course level is 1000 or above.~~
- ~~Course section is not offered to the general public and is primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).~~
- ~~Course was developed specifically for a particular business or organization.~~

#OR#

5.1.8 In-service training for institutional employees

- ~~Course is for credit.~~
- ~~Board approved tuition is assessed.~~
- ~~All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear marked to pay instructor costs).~~
- ~~Course originates in Utah or is taught through study abroad.~~
- ~~Course section is part of regular curriculum and is taught on a full term basis or equivalent to a full term basis or until a defined competency is achieved.~~
- ~~Course level is 1000 or above.~~
- ~~Course section is not offered to the general public and is primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).~~
- ~~Course was not developed specifically for a particular business or organization.~~
- ~~Course enrollees are predominantly non-matriculated employees of the institution.~~

#OR#

5.1.9 Correspondence study

- ~~Course is for credit.~~
- ~~Board approved tuition is assessed.~~
- ~~All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear marked to pay instructor costs).~~
- ~~Course originates in Utah or is taught through study abroad.~~
- ~~Course section is part of regular curriculum and is taught on a full term basis or equivalent to a full term basis or until a defined competency is achieved.~~
- ~~Course level is 1000 or above.~~
- ~~Course section is offered to the general public not primarily intended for members of particular groups (i.e. companies, school district courses for teachers, in-service training).~~
- ~~Course is a correspondence course.~~

#OR#

~~5.1.10 Technology-based course for non-resident student~~

- ~~• Course is delivered to the student through technology.~~
- ~~• Student is a non-resident of Utah under provision of R512, Determination of Resident Status and is residing outside of Utah.~~

~~5.2 Self-Supporting Concurrent Enrollment (SF): (course must meet all of the following criteria)~~

- ~~• Course is for credit.~~
- ~~• Course is a concurrent enrollment course (i.e. for secondary students concurrently receiving college credit and high school credit) and enrollment activity is supported from state concurrent enrollment funds.~~
- ~~• Instructional costs of the course are paid for by the high school or district.~~
- ~~• Course is taught in Utah.~~

~~5.3 Self-Supporting Course Below 1000 (SM): (course must meet all of the following criteria)~~

- ~~• Course is for credit.~~
- ~~• Course is not offered at a high school site or is offered at a high school site but is not a concurrent enrollment course.~~
- ~~• Board approved tuition is not assessed.~~
- ~~• All instructor costs of the course are paid for by institutional funds (e.g. external funds have not been received or ear-marked to pay instructor costs).~~
- ~~• Course originates in Utah.~~
- ~~• Course section is part of regular curriculum and is taught on a full-term basis or equivalent to a full-term basis or until a defined competency is achieved.~~
- ~~• Course level is below 1000.~~

~~5.4 Self-Supporting Custom Fit (SQ): (course must meet all the following criteria)~~

- ~~• Course is not for credit.~~
- ~~• Course is vocational or pre-requisite to a vocational program.~~
- ~~• Course funded by Custom Fit funding (i.e. appropriation made to the institution to support company specific vocational training programs).~~

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