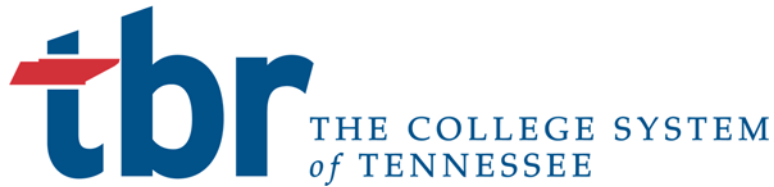


PRESIDENTS QUARTERLY MEETING
August 8, 2017- 9:00 a.m. CT
TBR Rooms 341-344

1. Shared Services (Chancellor Tydings)
2. Dual Enrollment (Chancellor Tydings)
3. Presidents Retreat Update (Chancellor Tydings)
4. Bookstore RFP Committee (Danny Gibbs)
5. Safety and Security Appropriations (Danny Gibbs)
6. Financial Performance Indicators (Danny Gibbs)
7. Recommended Revisions to Policy 4:01:00:02 – Institutional Financial Performance Review (Danny Gibbs) – *See Attachment*
8. Recommended Revisions to Guideline B-060 – Fees, Charges, Refunds, and Fee Adjustments (Danny Gibbs) – *See Attachment*
9. 2018-19 Capital Projects (Russ Deaton and Danny Gibbs)
10. Reconnect Launch (Russ Deaton)
11. Center for Community College Leadership at ETSU (Russ Deaton)
12. Status of Risk Assessment (Mike Batson)
13. External Affairs Vision (Kim McCormick)
14. Banner Curriculum/Interim Action (Tachaka Hollins)
15. TennCare Workforce Initiative (Tachaka Hollins)
16. THEC Off-Campus Form Requirements (Tachaka Hollins)
17. New Faculty Institute (Tachaka Hollins)
18. Free Speech (Mary Moody)
19. Smoking Policy (Mary Moody)
20. Immunization Policy (Mary Moody)
21. Expanding the Outstanding Student of the Year Program to Community College Students (Chelle Travis)
22. Community College SkillsUSA Membership (Chelle Travis)



Community College Presidents Breakout Session

Room 338 (Boxed Lunches Provided)

1. The Acquisition of a Data Management/Predictive Analytic/Student Retention System (Anthony Wise)

Colleges of Applied Technology Presidents Breakout Session

Remain in Rooms 341-343 (Boxed Lunches Provided)

1. Industry Certification Initiative (Jeff Sisk/Celle Travis)
2. Worker Characteristics Curriculum (Arrita Summers)
3. Regional Meetings Offer (Stewart Smith)
4. Update the Curriculum Committee Chairs Listing (West TN Presidents)
5. Business Affairs Sub-Council Report (Donna Hastings)
6. Review of P-043 Compensation Guideline (April Preston/Bob Wallace/Lynn Goodman)
7. TCAT Foundation 2016-17 Annual Report (Bob Wallace)
8. Development Discussion (Ginger Hausser/Bob Wallace)
9. TCAT Banner Financial Aid & Student Update (Celle Travis)
10. TCAT Participation in the National Student Clearinghouse (Celle Travis)
11. Banner Update – (Celle)
12. AT&T \$81K Grant Conference Call – (Lynn Goodman)

Presidents Meeting – August 8, 2017

SUBJECT: Recommended Revisions to Policy 4:01:00:02 – Institutional Financial Performance Review

PRESENTER: Danny Gibbs, Vice Chancellor
Business & Finance

ACTION REQUIRED: Approval

Background:

Policy 4:01:00:02 - Institutional Financial Performance Review - was revised for housekeeping changes. The CFI table for universities was eliminated. Section IV.A.4 was revised to rename both calculations from University and Community College/TCAT to Institutions with More Than Nominal Outstanding Debt and Institutions with No or Nominal Outstanding Debt. These changes were made to recognize that community colleges and/or TCATs may have more than nominal outstanding debt in the future.

Attachment

Institutional Financial Performance Review:

4:01:00:02

Policy Area

Business and Finance Policies

Applicable Divisions

TCATs, Community Colleges, ~~Universities~~, System Office

Purpose

It is the policy of the Board that institutions have a sound financial base and demonstrate financial stability sufficient to support the mission of the institution over the long term. Although missions may vary among institutions, a sound financial base and a pattern of financial stability provide the foundation for accomplishing an institution's mission, regardless of changing economic conditions. Financial and physical resources should be managed in a manner that permits the institution to fulfill its mission long term.

Policy

- I. Responsibility
 - A. The chief executive officer of each institution is responsible for administering and managing the institution's financial affairs in such a manner as to ensure the institution's current and future financial health. This policy establishes the tools used to assess the financial health of an institution, the reporting process, and actions to be taken if an institution shows signs of financial weakness.
- II. Background
 - A. The analytical framework contained within this policy is derived from Strategic Financial Analysis for Higher Education; Identifying, Measuring & Reporting Financial Risks; Seventh Edition, published by KPMG; Prager, Sealy & Co., LLC; and ATTAIN. This framework and its primary metric, referred to as the

Composite Financial Index (“CFI”), are widely used in the higher education community to understand the financial health of institutions. The methodology, ratios, and related benchmarks contained in this policy are taken from this publication.

- B. To determine an institution’s financial performance, four questions are asked:
 - 1. Are resources sufficient and flexible enough to support its mission;
 - 2. Does financial asset performance support the institution’s strategic direction;
 - 3. Do operating results indicate the institution is living within its available resources; and
 - 4. Is debt managed strategically to advance its mission.
- C. To address these four questions, data from an institution’s unaudited financial report are used to determine four “core” financial ratios that are then combined into a single composite metric of financial condition – the Composite Financial Index.

III. Calculation of Core Ratios and CFI

- A. All calculations include the financial results of the institution’s component unit (i.e. related foundation(s), noted as “CU”) to present a comprehensive picture of the institution’s overall financial condition. The data source for calculation of each ratio is the institution’s unaudited annual financial report, with all calculations reflecting the results from a single year (i.e. no use of moving averages). The four core financial ratios, including general descriptions, the calculation method, data sources, an expected performance standard, and a performance watch level and a similar description of the calculation and interpretation of the Composite Financial Index value, are as follows.
 - 1. Return on Net Assets
 - a. Description: The return on net assets ratio measures total economic return during the fiscal year. This measure is similar to the return on equity ratio used in examining for profit concerns and answers the

questions, “Are they better off financially than they were a year ago” and “Does financial asset performance support the strategic direction of the institution?” While investments in plant, a capital campaign, or a poor stock market can all create year to year volatility in this measure, the trend over time should be positive.

1. Calculation: **Change in Net Assets + CU Change in Net Assets / Total Net Assets (beginning of year) + CU Total Net Assets (beginning of year)**
2. Expected Performance Standard: The return on net assets ratio should be at least 3 percent above the rate of inflation. For example, if the Consumer Price Index (CPI) is at 3 percent, a return on the net assets ratio of 6 percent is desirable.
3. Watch Level: Consistently below the rate of inflation. Anything below the rate of inflation indicates a reduction of the institution’s asset base in real dollars, thereby eroding the purchasing power of institutional resources for future generations.
 - a. Net Operating Revenues Ratio
 1. Description: The net operating revenues ratio indicates an operating surplus or deficit in the given fiscal year. A positive ratio indicates that the institution experienced an operating surplus for the year. This ratio is similar to a profit margin and answers the questions, “Did they balance operating expenses with available revenue” and “Do the operating results indicate that the institution is living within available resources?” Depreciation expense is included to reflect the use of physical assets in measuring operating performance.
 1. Calculation: **Operating Income (Loss) + Non-operating Revenues (Expenses) + CU Change in Unrestricted Net**

**Assets / Operating Revenues + Non-operating Revenues + CU
Total Unrestricted Revenue**

2. Expected Performance Standard: A ratio of 4.0%. This is considered adequate to keep pace with the growth in operating expenses and maintain reserves at acceptable levels.
 3. Watch Level: Consistently below zero. A deficit in a single year does not necessarily indicate a problem, but deficits over several years are a cause for concern and suggest that the institution's mission cannot be sustained and institutional finances should be restructured.
- b. Primary Reserve Ratio.
1. Description: The primary reserve ratio measures financial strength and flexibility by comparing expendable net assets to total expenses. This measure answers the question, "How long can the institution survive without additional net assets generated by operating revenue?"
 1. Calculation: **Expendable Net Assets + Expendable Net Assets /
Total Expenses + CU Total Expenses**
 2. Expected Performance Standard: A ratio of 0.40 (representing about 5 months of expenses) or higher. At this level an institution has the flexibility to manage minor financial disruptions and other unforeseen events with less need to immediately disrupt ongoing activities. At this level, an institution can be expected to carry on a reasonable level of facilities maintenance activities.
 3. Watch Level: A ratio of 0.133 (represents less than 1.5 months of expenses in ready assets) or less. Institutions at these levels have less operating flexibility to meet unexpected events, generally lack sufficient resources to pursue strategic initiatives, and may struggle to invest in plant maintenance.
- c. Viability Ratio

1. Description: The viability ratio measures the financial health of the institution by comparing total expendable net assets to total current and non-current liabilities. This ratio is similar to a coverage ratio used in the private sector to indicate the ability of an organization to cover its long term debt from readily available resources and answers the questions, “How much of their debt can the institution pay off with existing resources” and “Is debt managed strategically to advance the institution's mission”. For institutions with no debt, this ratio is ignored in the calculation of the CFI score. A ratio of 1.0 indicates an institution has expendable resources sufficient to satisfy all outstanding plant related debt.

1. Calculation: **Expendable Net Assets + CU Expendable Net Assets / Plant Related Debt + CU Plant Related Debt**

2. Expected Performance Standard: A ratio of 1.25 or higher (the higher the ratio, the stronger the credit-worthiness of the institution). At these levels, an institution has increased flexibility to address unexpended events.

3. Watch Level: A ratio of 0.41 or less. Similar to the primary reserve ratio Watch level, institutions at this level have decreased flexibility to respond to unforeseen events, essentially a reduced “margin of error” in the financial management of the institution. Dropping below a ratio of 0.41 may identify the institution as a credit risk.

IV. Composite Financial Index (CFI)

- A. After their calculation, these four ratios are combined to deliver a single measure of the overall financial health of the institution. By blending these four core financial ratios into one metric, a more balanced view of the institution's finances is provided since weakness in one measure can be offset by strength in another. Additionally, measuring the index over time provides a glimpse as to the

progress institutions are making toward achieving financial goals. CFI scores range from a low of -4.0 to a high of 10.0. The CFI is computed using a four-step methodology:

1. Computing the values of the core ratios as outlined above;
2. Calculating strength factors by dividing the core ratios by threshold values;
3. Multiplying the factors by specific weights; and
4. Totaling the resulting scores to obtain the composite financial index.
 - a. ~~Universities~~ (Institutions with More than Nominal Outstanding Debt):

Core Ratio Value		Threshold Value		Strength Value		Weight		Score
Return on Net Assets	/	0.020	=	0.00	x	20%	=	0.00
Net Operating Revenues	/	0.013	=	0.00	x	10%	=	0.00
Primary Reserve	/	0.133	=	0.00	x	35%	=	0.00
Viability	/	0.417	=	0.00	x	35%	=	0.00
Composite Financial Index Score							=	0.00

~~b.~~

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- e.b. ~~Community Colleges and TCATs~~ (Institutions with No or Nominal Outstanding Debt):

Core Ratio Value		Threshold Value		Strength Value		Weight		Score
Return on Net Assets	/	0.020	=	0.00	x	30%	=	0.00
Net Operating Revenues	/	0.013	=	0.00	x	15%	=	0.00
Primary Reserve	/	0.133	=	0.00	x	55%	=	0.00
Viability	/	0.417	=	0.00	x	0%	=	0.00
Composite Financial Index Score							=	0.00

- B. Expected Performance Standard: A score of at least 3.0. Strategic Financial Analysis for Higher Education indicates that at this level an institution is relatively financially healthy in that sufficient liquid resources exist to meeting unforeseen circumstances, net operating revenues are adequate, expendable net assets exceed the level of debt, and the return on net assets is reasonable.
- C. Watch Level: A score of 1.0 or less. Again, Strategic Financial Analysis for Higher Education suggest that scores of 1.0 or below call into question the institution's ability to carry out existing programs and survive.

V. Review Periods

- A. While important, the Board acknowledges that annual results should be placed in context by reviewing longer terms trends. By focusing on 3 to 5 year trends, the Board believes the long term financial health of an institution may be better ascertained.

VI. Process for Reporting

- A. Within thirty days of submission to the System Office of published financial statements, each institution's chief business officer or TCAT ~~director-president~~ shall be responsible for calculation of the institution's core ratios and CFI score and submitting this information to the System Office. As part of this submission, the chief business officer or TCAT ~~director-president~~ shall provide a narrative that explains the factors underlying changes in ratio values and CFI scores from the prior year, and whether these factors were planned or unexpected. If Watch Level performance is evidenced on any indicator, the submission shall also address what action the institution plans to take to improve the ratio or score in subsequent years.
- B. The System Office shall review institutional submissions. For any measure that evidences Watch Level performance, the System Office will review with the chief business officer or TCAT ~~director-president~~ the adequacy of the institution's plan to address the issue. Concerns regarding the adequacy of such plans, if any,

shall be communicated to the Chancellor and the institution's ~~chief executive officer~~president. If a Watch Level performance issue persists, it will be brought to the attention of the Chancellor and the Board in an exception report.

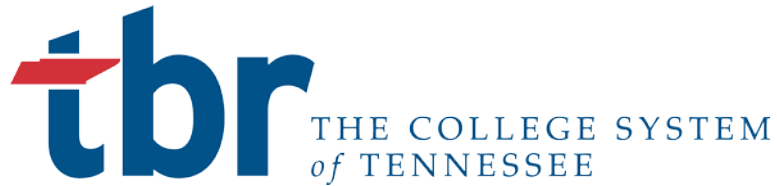
- C. On an annual basis, the Board shall be advised on the aggregate overall financial performance of the System and its institutions, in summary by sector. The System Office staff shall report to the Board any institution whose performance meets the Composite Financial Index Watch Level criteria specified in this policy.

Sources

NEW Policy approved at Board Meeting, September 26, 2014

Related Policies

- [Budget Control](#)
- [Budget Principles](#)



Presidents Meeting – August 8, 2017

SUBJECT: Recommended Revisions to Guideline B-060 – Fees, Charges, Refunds, and Fee Adjustments

PRESENTER: Danny Gibbs, Vice Chancellor
Business & Finance

ACTION REQUIRED: Approval

Background:

The recommended revisions are housekeeping in nature and are due to the passage of the FOCUS Act. The language regarding housing, graduate courses and the recruitment focus area plan were eliminated.

Attachment

Fees, Charges, Refunds, and Fee Adjustments: B-060

Guideline Area

Business and Finance Guidelines

Applicable Divisions

TCATs, Community Colleges, ~~Universities~~

Purpose

The purpose of the following guideline is to outline significant provisions for consistent administration of fees, charges, and refunds at the institutions governed by the Tennessee Board of Regents. These guidelines largely represent a consolidation of existing statements and practices. They are intended to serve as a reference document for institutional staff responsible for implementing and communicating fee-related matters. The guideline contents include general and specific provisions for: maintenance fees; out-of-state tuition; debt service fees; student activity; miscellaneous and incidental fees; deposits; ~~residence hall fees~~; and refunds.

These guidelines supersede all previous fee and refund guidelines, and may be revised by action of the Tennessee Board of Regents or the Chancellor. Exceptions to the guidelines may be made by the Chancellor upon written request by the president, ~~or college of applied technology director through the Vice Chancellor for Colleges of Applied Technology.~~

Guideline

I. General Provisions

A. Establishment of Fees and Charges

1. The Tennessee Board of Regents must establish or approve all institutional fees and charges unless specific exceptions are provided. The Board has adopted a practice of approving changes in fees and charges one time per year at the Board meeting when the annual operating budgets are considered. This is usually the regular June meeting of the Board.
2. The institution president ~~or college of applied technology director~~ is responsible for the enforcement and collection of all fees and charges. Fees and charges which specifically do not require Board approval must receive

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formal approval by the president or designee, ~~in the case of the colleges of applied technology, the Vice Chancellor for Colleges of Applied Technology.~~

3. Institutions should attempt to follow a general format in publishing information on fees and charges, including but not limited to the following:
 - a. All statements which include the fee amount should be complete and specific enough to prevent misunderstanding by readers.
 - b. When a fee is quoted, the refund procedures should be clearly stated. If there are qualifying conditions for refunds, those conditions also should be stated. If there is no refund, it should be labeled as non-refundable.
 - c. Whenever possible, specific dates related to the payment of fees and the refund procedures should be stated.
 - d. It should be made clear that all fees are subject to change at any time.

B. Approval of Exceptions

1. In accordance with these guidelines, the president of an institution or designee has the authority to determine the applicability of certain fees, fines, charges, and refunds, and to approve exceptions in instances of unusual circumstances or for special groups.
2. ~~The Vice Chancellor for Colleges of Applied Technology shall have this authority for the colleges of applied technology.~~
3. All such actions should be properly documented for auditing purposes.

C. Appeals Process

1. An appeals process should be established by each institution, and communicated to students, faculty, and staff.
2. The process should provide for final appeal to the president or ~~director~~, or his or her designee.
3. Separate appeals processes may exist for different types of fees, charges, and refunds.

D. Payment of Student Fees

1. As provided in the Tennessee Board of Regents Policy on Payment of Student Fees and Enrollment of Students (No. 4:01:03:00):
 - a. An applicant for admission to an institution will be considered and counted as a student when all assessed fees have been paid in cash, when the initial minimum payment due under the deferred payment plan has been paid, or when an acceptable commitment from an agency or organization approved by the institution has been received by the institution.
 - b. An applicant shall possess an acceptable commitment when he/she has timely submitted an application(s) for financial aid with the reasonable probability of receiving such.
2. Pursuant to the above condition, institutions with a continuous registration process must require payment of all applicable fees or payment of the initial minimum payment due under the deferred payment plan prior to the regular registration period as defined by each institution.
 - a. Students who do not prepay all fees or have an acceptable approved financial aid deferment will forfeit pre-registration privileges and must enroll under the normal registration process.
3. A prepayment plan to assist parents and students with planning and budgeting their academic year expenses is authorized.
 - a. Under the plan, students may choose the expenses they wish to prepay including ~~room, board, tuition, and fees.~~
 - b. Expenses can be prepaid over a period of eight months.

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II. Maintenance Fees

A. Description of Fees

1. The Maintenance Fee is a charge to students enrolled in credit courses. It is an enrollment or registration fee and is calculated based on the number of Student Credit Hours (SCH's) for ~~universities and~~ two-year institutions or

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student contact hours for colleges of applied technology for which the student enrolls. Fees are established by the Tennessee Board of Regents.

2. The same fee is applicable to courses for which the student is enrolled on an audit basis.

B. Rates

1. Rates are established by the Board and incorporated in a fee schedule ~~that groups specific fees; by type of institution (two-year institutions; APSU, ETSU, MTSU, TSU, and TTU; and UOM); and by student level (undergraduate and graduate).~~ The hourly rate will be discounted when undergraduate students enroll in greater than 12 hours ~~and graduate students in greater than 10 hours~~ unless stated otherwise elsewhere in this guideline.
2. Developmental courses are charged at the two-year institution hourly rate. If a student enrolls in both regular and developmental courses, the rates shall be assessed at the hourly rate for each up to the current amount of 12 undergraduate hours. The discounted tuition rate will then apply to any additional courses.
3. For institutions with multiple summer sessions, maintenance fees and tuition may be assessed by using the current part-time rate with no maximum amount for total credit hours enrolled.
4. Maintenance fees may not be waived. However, specific exceptions are provided in the following instances:
 - a. Pursuant to T.C.A. § 49-7-113, exceptions exist for certain disabled and elderly students, as well as state service retirees. For audit courses, no fee is required for persons with a permanent, total disability, persons 60 years of age or older and domiciled in Tennessee and persons who have retired from state service with 30 or more years of service, regardless of age. For credit, a fee of \$70 per semester or \$60 per trimester may be

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charged to persons with a permanent, total disability, and persons who will become 65 years of age or older during the academic semester in which they begin classes and who are domiciled in Tennessee. (Note: This fee includes all mandatory fees; it does not include course-specific fees such as all miscellaneous course fees, materials fees, application fee, online course fees and parking fees.) This only applies to enrollment on a space available basis, which permits registration no earlier than four (4) weeks prior to the first day of classes.

- b. Pursuant to T.C.A. § 49-7-102, certain statutory fee exceptions exist for dependents and spouses of military personnel killed, missing in action, or officially declared a prisoner of war while serving honorably as a member of the armed forces during a period of armed conflict. If these provisions are invoked by a student, the correct applicable law should be determined.
5. Military reserve and national guard personnel who are mobilized to active military service within six months of attendance at a TBR institution and whose mobilization lasts more than six months shall be charged upon re-enrollment at such institution the tuition, maintenance fees, student activity fees and required registration or matriculation fees that were in effect when such student was enrolled prior to mobilization. After re-enrollment, no increase in tuition, maintenance fees, student activity fees or required registration or matriculation fees shall be assessed to such student until a period of time equal to one year plus the combined length of all military mobilizations has elapsed. In no event, however, shall a student's tuition and fees be frozen after re-enrollment for more than four years.
 - a. To be eligible for the tuition and fee freeze, the student shall have completed military service under honorable conditions and shall re-enroll in a TBR institution within six months of release from active duty.

- b. A student eligible for the tuition and fee freeze may transfer from one state institution of higher education to another state institution of higher education one time with such student's tuition and fees calculated at the institution to which the student transfers as if the student had been in attendance at that institution before the mobilization that resulted in the student's tuition and fee freeze at the initial institution.

C. Accounting Treatment

1. A revenue account for Maintenance Fees is used to record both the revenue assessed and refunds made.
2. As provided in GASB Statements 34 and 35, summer school revenues and expenditures must be accrued at fiscal year-end. Summer school activity will not be allocated to only one fiscal year.
3. In some cases full fees are not assessed to students. These occur when statutes establish separate rates for such groups as the disabled, elderly, and military dependents. The difference between normal fees and special fees is not assessed. Fees not assessed in these cases do not represent revenue. For administrative purposes the fees may be calculated and credited to revenue, then written off against a contra revenue account.
4. Agreements/contracts may be executed with a third party (federal agency, corporation, institution, etc.), but not with the individual student, to deliver routine courses at a fixed rate or for the cost of delivering the course and may provide for fees not to be charged to individual students. Individual student fees will be assessed as usual and charged to the functional category Scholarships and Fellowships. The amount charged to or paid by the third party is credited to the appropriate Grants and Contracts revenue account.
5. In some cases a non-credit course provides an option to grant regular credit. If a separate (or additional) fee is collected because of the credit, that amount is reported as Maintenance Fee revenue.

6. Full-time employees of the Tennessee Board of Regents and the University of Tennessee systems may enroll in one course per term at any public postsecondary institution, with fees waived for the employee.
 - a. No tuition paying student shall be denied enrollment in a course because of enrollment of TBR and UT employees.
 - b. Spouses and dependents of employees of the Tennessee Board of Regents system may be eligible for a student fee discount for undergraduate courses at Tennessee Board of Regents institutions and the University of Tennessee.
7. Tennessee Board of Regents institutions exchange funds for tuition fees of employees' spouses and dependents who participate in a Tennessee Board of Regents educational assistance program. Effective fall term 1990, the charging and exchanging of funds for maintenance fee discounts between Tennessee Board of Regents institutions and the University of Tennessee shall begin.
8. To the extent they are not reimbursed by the State, fee waivers for full-time State employees and fee discounts to children of certified public school teachers shall be accounted for as a scholarship.

III. Out-of-State Tuition

A. Description of Fee

1. This is an additional fee charged to students classified as non-residents who are enrolled for credit courses, including audit courses. This fee is in addition to the maintenance fee.
2. Out-of-state tuition fee rates are established by the Tennessee Board of Regents and are incorporated in the annual fee schedule.
3. ~~A separate hourly rate for out-of-state tuition will be set for undergraduate and graduate students.~~

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a. ~~While the per-hour rate for graduate students will be higher, the rates will be set so that a full-time graduate student and a full-time undergraduate student will pay approximately the same amount for out-of-state tuition.~~

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b. ~~A full-time student is defined as an undergraduate enrolled in 12 hours or a graduate student enrolled in 10 hours.~~

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4. Applicability of out-of-state tuition is determined pursuant to Tennessee Board of Regents Policy on Regulations for Students In-State and Out-of-State for the Purpose of Paying College or University Fees and Tuition and for Admission Purposes (No. 3:05:01:00). The business office will collect fees based upon student classification as determined by the appropriate authority within the institution.

B. Accounting Treatment

1. A revenue account for out-of-state tuition is used for recording both credits for fees and debits for refunds.
2. Other accounting is the same for out-of-state tuition as that outlined under Maintenance Fees except that separate out-of-state accounts are used.
 - a. In the case of fees not collected from students under grants and contracts, the same expense account under Scholarships and Fellowships may be used.

IV. ~~Recruitment Focus Area Plan~~

A. ~~Description of Plan~~

1. ~~The Recruitment Focus Area Plan has been made available to TBR universities on an "opt-in" basis. Institutions who wish to opt-in must file a request with the System Office. Unless otherwise delegated, approval of a request to adopt the Plan would rest with the Board.~~
2. ~~The Plan applies to admitted students (both undergraduate and graduate) who graduate from a high school located in a county within a 250-mile radius of the city in which the main campus of a university is located.~~

3. ~~The out-of-state tuition rate charged to students eligible for the Plan rate will equal the institution's state subsidy per full-time equivalent for the prior fiscal year. This rate would be capped at 12 hours for undergraduate students and 10 hours for graduate students.~~
4. ~~The Recruitment Focus area rate does not impact students who otherwise qualify for border county classification or other in-state residency classification.~~
5. ~~Participating institutions must adopt a process that permits reporting to the System Office on the effect of the Plan.~~

B. Accounting Treatment

1. ~~The maintenance fee and the out-of-state tuition should each be recorded as outlined in sections II and III above.~~

V. eRate

A. Description of Fee

1. The eRate is available to students who enroll at TBR institutions, who are classified as non-residents of Tennessee, and who are enrolled exclusively in online courses.
2. The eRate is 150% of the institution's approved undergraduate ~~or graduate~~ maintenance fee.
3. The hourly rate will not be discounted for students receiving the eRate and enrolling in greater than 12 undergraduate hours ~~or 10 graduate hours.~~
4. To qualify for an eRate, students must:
 - a. Meet all institution admission requirements and must
 - b. Be verified as an online out-of-state student enrolled exclusively in courses delivered online by a procedure documented by the institution.
 - c. Out-of-state students in item 2. above refers to geographic location and does not include undocumented students living in Tennessee.

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5. Students enrolled in any type courses other than online (on-ground, telecourse, distance education, etc.) will not be eligible for the eRate specified in this guideline and will instead incur traditional non-resident fees and charges.
 - a. Students who enroll in both online courses and other type courses and subsequently drop the other type courses will not then become eligible for the eRate.
6. Institutions enrolling eRate students as defined in this guideline must provide a method to mitigate any negative impact on the opportunity for Tennessee student enrollment in online courses.

B. Accounting Treatment

1. The eRate is comprised of the maintenance fee and a 50% markup that represents the out-of-state tuition portion.
2. The maintenance fee and the out-of-state tuition should each be recorded as outlined in sections II and III above.

VI. Debt Service Fees

- A. The amount of debt service fees will be approved by the Tennessee Board of Regents. Separate rates are recommended by each institution based on requirements of the institution.
- B. For simplicity of administration and communication, institutions may combine debt service with maintenance fees in quoting fee rates, in fee billings and charges, and in making refunds.
- C. Revenue from debt service fees will be recorded in the unrestricted current fund and then transferred to the retirement of indebtedness fund as either a mandatory transfer or a non-mandatory transfer. The portion of debt service fee revenue used for current-year debt service will be reported as a mandatory transfer. Any additional debt service fee revenue will be transferred to the retirement of indebtedness fund as a non-mandatory transfer.

- D. At the conclusion of the debt retirement for a given project, the debt service fee attributed to the project will cease. Any new project requires the approval of a new debt service fee on its own merits without the reallocation of any existing fee. Any continuation of fees necessary for renewal and replacement of a project for which the debt is totally retired must be approved for that purpose by the Tennessee Board of Regents.

VII. Student Fees

- A. A student government activity fee may be established pursuant to T.C.A. § 49-8-109. Any increase in this fee shall be subject to a referendum for student body approval or rejection. The fee will be administered in accordance with the provisions adopted by each institution. These fees will be restricted current funds additions. These fees are refundable on the same basis as maintenance fees or as established by the institution.
- B. Student activity fees (other than student government activity fees) will be approved by the Tennessee Board of Regents. Such fees may be recommended by each institution based on services to be provided which are related to the activity fee. These fees will be unrestricted current funds revenues. These fees are refundable on the same basis as maintenance fees or as established by the institution.

VIII. Technology Access Fees

- A. A fee shall be levied by each institution for the purpose of providing student access to computing and similar technologies. It is refundable on the same basis as maintenance fees or as established by the institutions. Institutions shall establish expenditure accounts and designated revenue accounts for purposes of recording technology access fees and expenditures.
- B. Use
 - 1. Technology Access Fees (TAF) are composed of two pools. Pool 1 represents the TAF prior to FY 1997-98 when it did not exceed \$30 annually.

Pool 2 represents the difference between the current TAF rate and the pre-1997-98 TAF rate. Items 2 and 3 below shall apply to use of Pool 2 TAF funds.

2. The TAF should be used by TBR institutions for direct student benefit, for items such as new and improved high technology laboratories and classrooms, appropriate network and software, computer and other equipment, and technological improvements that enhance instruction. Use of Pool 2 TAF is limited to the following items:
 - a. Computers and other technical laboratory supplies, equipment, and software and maintenance.
 - b. Network costs (WWW internet, interactive video, etc.)
 - c. "Smart" or multimedia classroom equipment and classroom modifications.
 - d. Lab and course staffing - student and staff assistance for lab and classroom uses; ~~universities re limited to a 12% maximum (Pool 2 current-year TAF revenues) and student employees only;~~ community colleges are limited to 25% maximum (Pool 2 current-year TAF revenues) for student or staff employees.
 - e. Renewal and replacement reserves as necessary.
 - f. New machines for faculty use when faculty are actively engaged in developing and conducting on-line courses.
 - g. Faculty and staff development directly related to the introduction or application of new technology which impacts students. These guidelines should have the flexibility to place instructional technology in a faculty lab where course materials are being prepared. For example, TAF funds can be used to create faculty labs to include the purchase of computers and to conduct faculty training and course development. (Travel costs for faculty and staff are excluded; however, consultants may be hired as needed for training.)

- h. Infrastructure (wiring, network, servers, etc.) necessary to provide students maximum computing capability. A ceiling is established of 50% of the total project costs from which technology access fees can be used.
 - i. Expand technology resources in library, i.e., video piped anywhere on campus, interactive video room for distance education, network for web video courses.
- 3. ~~Effective July 1, 2005, institutions may use Technology Access Fee (TAF) revenues for the purpose of supporting the financing of the implementation of the Banner Enterprise Resource Planning (ERP) project including subsequent software and hardware upgrades. Use of TAF funds for this purpose is limited to a maximum of 25% of the annual revenue collected at universities, community colleges and colleges of applied technology. Use of TAF fees for the ERP project must be disclosed and justified in the annual spending plan which requires approval by the Board. The provision for use of TAF fees for this special purpose is repealed for fiscal years beginning on or after July 1, 2010.~~
- 4. As part of the July budget process, each institution shall prepare a detailed spending plan for the use of funds generated by the TAF. Prior to submission of July budgets, the Chancellor or his designee shall randomly select 25% of institutions for review of TAF spending plans. Each institution selected shall submit their TAF spending plan as part of their July budget. These spending plans shall be reviewed by the Chancellor or his designee for compliance with TAF use guidelines and Board policy. A report of this review shall be filed with the Board.
- 5. The spending plan will be maintained by the institution and will be updated throughout the year as needed. The President shall ensure that the spending plan is prepared. At the end of the fiscal year, a summary of the actual

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money generated and actual use of the money shall be prepared and maintained by the institution.

6. Compliance with these guidelines will be audited by the internal audit staff and reported to the Board as determined by the internal auditor's annual risk-based planning process or other appropriate means.

IX. Specialized Academic Fees

- A. Certain academic programs require expensive maintenance/updating of equipment and software and the employment of highly qualified staff. The high costs of instruction for these programs can be offset by establishing specialized academic fees, with the Board's approval. To receive approval for a specialized academic fee, a program will be required to meet criteria 1., High Cost of Instruction as defined below. Additionally, the program should document meeting criteria 2.-7., as applicable.
 1. High Cost of Instruction. Programs qualifying for charging specialized academic fees must demonstrate that they are more costly than other programs offered by the institution. If appropriate, the extraordinary cost of the program must be validated including benchmarking with similar programs in the region and nation.
 2. High Demand. The number of students enrolled in the program and the student credit hours generated are sufficient to justify additional fees.
 3. High Cost of Updating/Maintaining Equipment and Software. Programs qualifying for charging specialized academic fees are expected to be those that require extensive maintenance and regular updating of equipment and/or software, all of which are very expensive. An average hardware/software cost per student credit hour serves as the basis for determining the amount of the fee.
 4. Accreditation. Meeting standards of specific accrediting agencies may also qualify a specialized program for charging specialized academic fees. The

accrediting standards that justify a fee are those that specify the possession and use of certain equipment and unique software that are extraordinarily costly and/or the employment of faculty with specific credentials that demand high salaries.

5. High Recognition and Quality. The programs approved for specialized academic fees are expected to be distinctive and with a regional or national reputation. The program must demonstrate that it has achieved exceptional recognition in its particular enterprise.
 6. High Value to Tennessee. The program must demonstrate that it is a good investment for the State of Tennessee to justify charging extra fees to the student. The program should be distinctive and not one duplicated in other TBR institutions and should be of integral value to Tennessee. The graduates' earning potential and the associated benefit to the state economy should be projected, as well as the efforts taken by the institution to aid graduates in finding appropriate employment in Tennessee.
 7. Impact on Affected Students. Through surveys, questionnaires, or other suitable means, the program must demonstrate that the charging of additional fees will not diminish enrollment. The program should demonstrate that enrolled students realize that the potential earning power in the work force justifies their additional investment.
- B. Institution must submit documentation of the above applicable criteria when requesting approval of a specialized academic fee. Specialized academic course fee revenues are limited to funding related costs accumulated in the instruction function.
- X. Miscellaneous Course Fees
- A. All miscellaneous fees must be approved by TBR. Fees for courses requiring special off-campus facilities or services do not require Board approval but should reflect the cost of the facilities or services.

XI. Incidental Fees and Charges

A. Uniform Rates and Policies - Institutions

1. The following fees will be uniformly charged (or, if applicable, to the extent that they remain within the set range) at all institutions both as to the amount and condition of assessment. Charges are subject to approval by the Tennessee Board of Regents.

a. Application Fee:

1. Undergraduate - Not less than \$5.00 or more than \$25.00.

~~2. Graduate - Not less than \$25.00 or more than \$75.00.~~

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~~3. ETSU College of Medicine and College of Pharmacy - Not less than \$50 or more than \$100.~~

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~~1. This is a non-refundable fee paid by an individual who applies for admission to the institution. A student is required to pay this fee when he/she applies for admission as a graduate student even if the student attended a TBR institution as an undergraduate student. Additionally, the student is required to pay this fee when he/she applies for admission to a doctoral-level program after receiving a masters-level degree from the institution.~~

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b. ~~Graduation Fee: This fee shall be assessed according to degree level as follows and shall include the cost of the diploma and rental of academic regalia:~~

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~~1. Associate Degree \$25.00~~

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~~2. Baccalaureate 30.00~~

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~~3. Master and Specialist 35.00~~

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~~4. Doctor and Juris Doctor 45.00~~

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~~1. The fee is refundable only if the institution has incurred no costs on the student's behalf. Other items may be included in the fee, as determined by the institution. Additional fees may be charged for~~

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~~optional graduation-related activities or services. Effective July 1, 2011, community colleges will no longer assess a graduation fee.~~

e. ~~Late Exam Fee: None~~

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B. Institutions

1. Returned Check Fee: \$30.00 per check - nonrefundable. All institutions will charge a returned check fee that is the maximum set by state law. This fee will apply to all returned checks received by the institution, whether from students, faculty, staff, or other parties. The Board will review state statutes each spring to determine any changes. (T.C.A. 47-29-102)

C. Colleges of Applied Technology

1. Each college of applied technology will assess a nonrefundable fee for individual instructional projects pursuant to a schedule approved by the Tennessee Board of Regents.

D. Other Fees and Charges Subject to Board Approval

1. Institutions

- a. The following fees may be assessed by all institutions. Specific rate recommendations will be developed separately by each institution for approval by the Tennessee Board of Regents. In review of the recommendations, the Board staff will consider the consistency of fees for comparable services among institutions.
 1. Motor Vehicle Registration - nonrefundable. A fee may be levied by each institution per academic year, per fiscal year and/or per academic term for motor vehicle registration, and such fee shall be applicable to each student, faculty and staff member.
 2. Campus Access Fee - At institutions where registration of specific vehicles is not necessary a campus access fee may be assessed in lieu of a motor vehicle registration fee. It is refundable on the same basis as maintenance fees or as established by the institution.

3. ~~Post Office Box and/or Postal Service Fee – nonrefundable. This fee may be assessed for U.S. Postal services provided on campus to the student population.~~
 4. Traffic Fines - nonrefundable. These fines will apply to all employees and students.
 5. Applied Music Fees. This fee is charged for private music lessons or small group training sessions. It is refundable on the same basis as maintenance fees or as established by the institution.
 6. Late Registration Fee. A late registration fee up to \$100 will be charged during the entire period of late registration. The effective date of the fee will be determined by each institution.
 7. Facilities Fee. This fee will be used to improve facilities and fund expenditures such as replacing carpets in student lounges, remodeling classrooms, etc. The fee would not be used for routine maintenance or new construction, but would be used to make improvements to areas that have an impact on students. The intended projects will be disclosed during the normal budget cycles. The fee is refundable on the same basis as maintenance fees.
2. Institutions and Colleges of Applied Technology
 - a. Transcript Fee. There will be no charge for transcripts; however, institutions and colleges of applied technology shall set a limit on a reasonable number of copies at any one time and may establish a nonrefundable charge for the cost of copying transcripts in excess of that number.
 3. Fees and Charges to be Established and Administered by the Institution.
 - a. The following fees and charges may be established and administered by each institution. No specific approval or notification to the Tennessee Board of Regents will be required unless subject to other Board or State

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requirements. The institution will establish appropriate refund policies.

~~College of Applied Technology fees and charges in this category must be approved by the Vice Chancellor for Colleges of Applied Technology.~~

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1. Sales of goods and services of a commercial nature, including bookstores, food services, vending, laundry and similar activities.
2. Rental of non-student housing and facilities.
3. Admissions fees to athletic and other events open to the public, including special events sponsored by campus organizations and activities.
4. Sales and services of educational activities such as clinical services, publications, etc.
5. Registration for conferences, institutes, and non-credit activities (see XIII.A.4.).
6. Fees for use of campus facilities for recreational purposes.
7. Parking permits and parking meters for use by guests and visitors.
8. Colleges of Applied Technology may assess a fee for specific school instructional projects to defray incidental costs incurred by the college of applied technology in performing the project.
9. Nonrefundable library fines, which will apply to students, faculty, staff, and other library users.
10. ~~Thesis and dissertation fee - nonrefundable. The fee will be determined based upon cost to the institution.~~
11. Child Care Fees - Kindergarten, Preschool, Early Childhood, Day Care, or similarly defined activities. The refund policy will be established by the institution.
12. Special Exam Fee - nonrefundable. The fee will be determined based upon cost to the institution.

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13. Standardized Test Fees - nonrefundable. The fee will be determined based upon the cost for administering the tests.
14. Identification Card Replacement - nonrefundable. There will be no charge for the original identification card. A fee may be set by each institution to offset the cost of replacing the card. This fee applies only to student ID cards and not to faculty and staff ID's.
15. Change of Course or Section Fee - nonrefundable. If the change is caused by the institution, there will be no charge for the change. If two or more forms are used at one time, they will be treated as one change/form. Institutions may waive the fee for schedule changes.

XII. Deposits

- A. Breakage deposits may be recommended by the institution for Board approval for courses in which it can be shown that there is a reasonable chance of loss or damage to items issued to students. The amount of the deposit should be related to the materials issued and subject to a 100% refund.
- B. A deposit may be established by the institution for rent or lease of buildings and facilities or for the issuance of other institutional property or equipment. Deposits should be subject to a 100% refund if no damage or loss occurs. The amount of such deposits should be related to the value of the facilities or equipment subject to loss and the general ability of the institution to secure reimbursement should loss or damage occur.

- C. ~~Pursuant to Tennessee Board of Regents Policy on Student Residence Regulations and Agreements (No. 3:03:01:00), each institution is authorized to require a security deposit for residence hall facilities which may be forfeited by the student for failure to enter into a residence agreement or non-compliance with applicable agreement terms.~~

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XIII. ~~Student Residence Hall and Apartments~~

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A. ~~All regular and special rental rates for student dormitories and student apartments will be approved by the Tennessee Board of Regents upon the recommendation of the institution. A \$5.00 late payment fee shall be assessed. Each institution may recommend special rates for non-student groups during summer periods, etc.~~

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B. ~~Pursuant to Tennessee Board of Regents Policies on Student Resident Regulations and Agreements (No. 3:03:01:00) and Payment of Student Fees and Enrollment of Students (No. 4:01:03:00), rental for student dormitory or residence hall units shall be payable in full in advance of the beginning of a term. However, each institution shall offer an optional payment plan under which a prorated amount of the rental shall be payable monthly in advance during the term. Specific provisions for the payment plan must comply with those cited in Policy No. 3:03:01:00. A monthly service charge and a late payment charge may be assessed. Residence Hall students can participate in either the deferred payment plan (Guideline B-070) or the optional monthly housing payment plan. Each institution has the option of allowing students to participate in both the deferred payment plan and the optional monthly housing payment plan.~~

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XIV. Other Fee and Charge Considerations

- A. Institutions may submit for Board of Regents approval fees and charges not specifically covered by those guidelines when the establishment of a fee or charge is justified by the institution.
 - 1. Fees may be established to control the utilization of facilities and services or to offset the cost of extraordinary requirements as a result of specific programs or activities. [Reference Tennessee Board of Regents Policy on Access to and Use of Campus Property and Facilities (No. 1:03:02:50).]
 - 2. When fees and charges are incorporated in agreements with outside contractors and vendors, specific rates, refunds and conditions must be clearly stated.

3. Fees for auxiliary services must take into consideration that Auxiliary Enterprises should be a break-even operation with rates and charges generating revenue sufficient to cover all expenses as defined in operating budget guidelines.
4. Fees established for non-credit courses and activities shall be sufficient to cover the total costs incurred in providing instruction plus a minimum of 25% of the annual instructional salary costs including contractual salary costs or personal services contracts.
5. Students enrolled for six or more hours are eligible for full-time privileges, i.e., access to social, athletic, and cultural functions, pursuant to T.C.A. § 49-8-109.

XV. Refunds and Fee Adjustments

- A. Adjustments to all fees and charges must be in accordance with the following provisions except as previously stated, or when required by federal law or regulation to be otherwise.
- ~~B.~~ Pursuant to T.C.A. §§ 49-7-2301 and 49-7-2302, students called to active military or National Guard service during the semester are entitled to a 100% adjustment or credit of mandatory fees. ~~Housing and meal ticket charges may be prorated based on usage.~~
- C. Maintenance Fee Refunds and Adjustments
 1. Refunds are 100% for courses canceled by the institution.
 2. Changes in courses involving the adding and dropping of equal numbers of SCH's for the same term at the same time require no refund or assessment of additional maintenance fees, unless the dropping and adding involves ~~RODP~~ TNeCampus courses. The change of course fee would be applicable.
 3. The fee adjustment for withdrawals or drops during regular terms (fall and spring) is 75% from the first day of classes through the fourteenth calendar day of classes and then reduced to 25% for a period of time which extends

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25% of the length of the term. When the first day of the academic term falls on a Saturday, the 100% refund period is extended through the weekend until the following Monday morning (12:01 am). There is no fee adjustment after the 25% period ends. Dropping or withdrawing from classes during either the 75% or the 25% fee adjustment period will result in a fee adjustment of assessed maintenance fees based on the total credit hours of the final student enrollment.

4. For summer sessions and other short terms, the 75% fee adjustment period and the 25% fee adjustment period will extend a length of time which is the same proportion of the term as the 75% and 25% periods are of the regular terms.
5. All fee adjustment periods will be rounded to whole days and the date on which each fee adjustment period ends will be included in publications. In calculating the 75% period for other than the fall and spring and in calculating the 25% length of term in all cases, the number of calendar days during the term will be considered. When the calculation produces a fractional day, rounding will be up or down to the nearest whole day.
6. A full refund (100%) is provided on behalf of a student whose death occurs during the term. Any indebtedness should be offset against the refund.
7. A 100% refund will be provided for students who enroll under an advance registration system but who drop a course or courses prior to the beginning of the first day of class.
8. A 100% refund will be provided to students who are compelled by the institution to withdraw when it is determined that through institutional error they were academically ineligible for enrollment or were not properly admitted to enroll for the course(s) being dropped. An appropriate official must certify in writing that this provision is applicable in each case.

9. When courses are included in a regular term's registration process for administrative convenience, but the course does not begin until later in the term, the 75%/25% fee adjustment periods will be based on the particular course's beginning and ending dates. This provision does not apply to classes during the fall or spring terms which may meet only once per week. Those courses will follow the same refund dates as other regular courses for the term.
10. The fee adjustment is calculated as the difference between (1) the per credit hour cost of originally enrolled hours and (2) the per credit hour cost of the courses at final enrollment after adjustments have been applied for all courses dropped. Adjustments are calculated at the full per credit hour rate less the fee adjustment credit at the applicable fee adjustment percentage (regardless of the original number of hours enrolled). Not all drops/withdrawals will result in fee adjustments.

D. Out-of-State Tuition Refunds and Fee Adjustments

1. The fee adjustment provision for out-of-state tuition is the same as that for maintenance fees. The 75% fee adjustment period and the 25% fee adjustment period will follow the same dates as the fee adjustment periods for maintenance fees. When 100% of maintenance fees are refunded, 100% of out-of-state tuition also is refunded. Calculation procedures are the same as those specified for maintenance fees.

E. Debt Service Fee Refunds

1. Debt service fees will be subject to the same refund policy as maintenance fees.

F. ~~Student Residence Hall/Apartment Rent and Deposit Refunds~~

1. ~~Refund of residence hall rent after registration will be prorated on a weekly calendar basis when the student is forced to withdraw from the residence hall:~~

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a. ~~Because of personal medical reasons confirmed in writing by a licensed physician, or~~

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b. ~~At the request of the institution for other than disciplinary reasons. Full refund will be made in the case of the death of the student. Withdrawals for other reasons will be subject to the same 75%/25% amounts and time periods as maintenance fees. No refund will be made other than under the above conditions.~~

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2. ~~Residence hall reservations and breakage deposits will be refunded in full if:~~

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a. ~~The institution is notified by a specific date which it establishes, but which may not be later than fourteen (14) calendar days prior to the first official day of registration,~~

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b. ~~The student is prevented from entering the university because of medical reasons confirmed in writing by a licensed physician, or~~

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c. ~~Residence hall space is not available. Full refund also will be made in the case of the death of the student.~~

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G. ~~Meal Plan Refunds~~

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1. ~~Each institution with meal plans should develop appropriate refund procedures.~~

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Sources

December 2, 1977 TBR meeting. Revised March 14, 1980 TBR meeting; November 13, 1991 presidents meeting; November 8, 1982 presidents meeting; July 1, 1984; November 1, 1988; May 15, 1990 presidents meeting; August 14, 1990 presidents meeting; November 10, 1992 presidents meeting; August 10, 1993 presidents meeting; November 9, 1993 presidents meeting; August 9, 1994 presidents meeting; May 8, 1995 presidents meeting, August 8, 1995 presidents meeting, November 8, 1995 presidents meeting, February 6, 1996 presidents meeting, May 14, 1996 presidents meeting, November 12, 1996 presidents meeting, May 6, 1997 presidents meeting, July 16, 1997 called Board meeting, November 5, 1997 presidents meeting, February 17, 1998 presidents meeting via conference call, August 25, 1998 presidents meeting, May 9, 2000 presidents meeting, August 8, 2000 presidents meeting, November 8, 2000 presidents meeting, February 13, 2001 presidents meeting, August 21, 2001 presidents meeting, May 21, 2002 presidents meeting, February 11, 2003 presidents meeting, May 20, 2003 presidents meeting, February 10, 2004 presidents meeting, August 17, 2004

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Related Policies

- [Access to and Use of Campus Property and Facilities](#)
- [General Student Housing Policy](#)
- [Policy for Classifying Students In-State & Out-of-State for Paying College or University Fees & Tuition & for Admission Purposes](#)