



**BRIDGERLAND
TECHNICAL
COLLEGE**
btech.edu

**BRIDGERLAND TECHNICAL COLLEGE
BOARD OF TRUSTEES
INSTITUTIONAL ADVISORY COMMITTEE**

**AUGUST 28, 2023, 4 P.M.
1301 NORTH 600 WEST, LOGAN, UTAH**

MINUTES

Board Members Attendance

Karina Brown – Cache County Executive Office, Nibley
Lisa Clawson – Great Harvest Bread, Paradise (Virtual)
Jack Draxler – Draxler Appraisal Services, Inc., North Logan
John Ferry – Utah State University Board of Trustees, Corinne
Nancy Kennedy – Box Elder School District, Brigham City
Roger Pulsipher – Cache School District, Avon
Paul Nelson – Northrop Grumman, Providence
Mark Smoot – Entrepreneur/Owner, Garden City
Eric Wamsley – Rich School District, Laketown
Larry Williams – Logan School District, Logan

Board Members Excused

Matt Chowning – Paragon Medical, Smithfield
Monica Holdaway – Box Elder Chamber of Commerce, Brigham City
Neil Perkes – Logan Regional Hospital, Logan

Bridgerland Technical College Attendance

K. Chad Campbell, President
Wendy Carter, Executive Vice President & Provost
Brandi Gittins, AVP for Finance & Facilities
Emily Hobbs, Administrative Chief of Staff
Renee Milne, AVP for Student Services
Lisa Moon, VP for Instruction

Bridgerland Technical College Excused

Troy Christensen, Vice President for Economic Development
Frank Stewart, Chief Development Officer

Guest(s)

Geoff Landward, Utah System of Higher Education
Eric Petersen, Utah System of Higher Education
Paul James, Bridgerland Technical College
Tiffany Jensen, Bridgerland Technical College
Jean Dunn, Bridgerland Technical College

Item 1

Welcome & Pledge of Allegiance

Nancy Kennedy conducted the meeting and welcomed those in attendance. The meeting was called to order at 4 p.m. The Pledge of Allegiance was recited.

Item 2

Approval of Minutes

ACTION: Motion was made by Jack Draxler for the approval of minutes from the June 26, 2023, Board meeting. Jon Ferry seconded. Motion carried.

Item 3

Oath of Office

The Utah System of Higher Education (USHE) recommended the college's Board of Trustees take the Oath of Office, which was conducted at the meeting. The State of Utah Oath of Office reads, "*I, [name], having been elected or appointed to the office of Member of the Board of Trustees of Bridgerland Technical College do solemnly swear (or affirm) that I will support, obey, and defend the Constitution of the United States and the Constitution of the State of Utah, and that I will discharge the duties of my office with fidelity. This oath is retroactive to my first day of service in this office.*"

Tiffany Jensen, notary public, administered the oath and completed the accompanying paperwork signed by board members. A copy will be sent to the state archives. It was noted that all work done by current and prior boards is still valid, with or without the oath of office. Members not in attendance at this meeting will meet with Tiffany and complete the oath and paperwork separately.

Jon Ferry mentioned the Utah State University board members sign a declaration of conflict of interest.

ACTION: The Oath of Office was conducted.

Item 4

Board of Trustees' Responsibilities

Geoff Landward, deputy commissioner of higher education, provided board members with a copy of the Responsibilities and Authority of USHE Governing and Administrative Officers. This handout was also attached to the agenda. He reviewed the following Board of Trustees' responsibilities:

- Appointment of a President
- Evaluation of Presidents & Establish Key Performance Indicators Annually
- Institutional Master Planning, Strategic Planning, and Goals
- Institutional Missions & Roles
- Institutional Policies/System Policies
- Tuition and Fees
- Budget and Finance Oversight
- Facilities
- Audit
- Academic & Technical Education Programs, Certificate Approval
- Program Review
- Research and Training Grants

- Community Relations/Advancement
- Honorary Degrees or Recognitions

Geoff Landward explained the Board of Trustees essentially has oversight. With the Board of Higher Education reduced to only nine members, the commissioner's office will serve as the liaison. In addition, there will no longer be an annual training for the chairs and vice chairs (as previously held in Cedar City). The training will be held in the Board of Trustees meetings, and USHE will ensure the board has the resources it needs. Board members can ask for training in any specific area as needed.

Item 5

FY 2022-2023 Student Enrollment & Outcomes

The institutional data stewards have been asked to submit the annual student enrollment and outcome information to USHE by predetermined dates each year. The data stewards are instructed to follow internal institutional processes, and USHE will accept the data as submitted. While the college is not required to have the enrollment data approved by the Board of Trustees, there is value in making sure the data is available for the trustees' information and review.

Renee Milne provided the board with a brief overview of the year-end data submission. A report showing the FY 2022-2023 compared to FY 2021-2022 results was available for review as a link. Wendy Carter thanked President Campbell for his vision for the college and noted the numbers directly reflect the hard work of faculty and staff. Certificate-seeking has been limited in expansion due to facility constraints. The college is excited to see growth with the new Health Sciences building in the future.

Item 6

FY 2023-2024 Key Performance Indicators

President Campbell explained that according to USHE Policy R208 and R209, the commissioner has tasked him with identifying key performance indicators (KPIs) on which to focus during the coming year. The KPIs are indicators of progress toward the college's and the Utah Board of Higher Education's (UBHE's) strategic plans. Statute calls for presidents to be evaluated based on college performance and progress toward systemwide priorities. President Campbell met with the Board of Trustee's Executive Board Leadership on August 7 to develop the following KPIs:

- a. Increase the number of graduates for certificate-seeking and high school students by 3-5%.
- b. Implement the credit initiative for 100% of certificate-seeking programs.
- c. Implement program alignment (for approved programs).
- d. Complete new Health Sciences building and move in.
- e. Start remodel/renovation of vacated space in existing building.
 - i. InTech Collegiate (remodel costs are the responsibility of InTech)
 - ii. Fashion
- f. Initiate capital improvement remodel/renovation of the Business & Innovation Hub.
- g. Develop data reporting tools and identify implementation strategies for access, timely-completion, and workforce development based on actual data.

The Executive Board Leadership team requested approval of the KPIs to be submitted to USHE by October 31, 2023. The UBHE institutional liaisons and the commissioner will review the proposed KPIs and may direct the president to reconsider any of them. The commissioner will notify the college upon final approval. President Campbell will be responsible for filing a report outlining progress on the approved KPIs by July 31, 2025, along with the new proposed KPIs for FY 2024-2025.

Board members expressed interest in evaluating the results of progress toward the KPIs. In addition, discussion ensued regarding faculty and staff performance and ensuring the KPIs are college-wide goals, not just the sole responsibility of the president.

ACTION: Eric Wamsley motioned to approve the FY 2023-2024 Key Performance Indicators. Roger Pulsipher seconded. Motion carried.

Item 7

Budget Request – Capital Improvement Request

Paul James presented the capital improvement requests designed to make major alterations, repairs, or improvements to existing state buildings. Included for information and review was a copy of the college's proposed capital improvement request for FY 2024-2025 (see attached). The spreadsheet represents a summary listing of the respective projects. The projects listed have been identified by a combination of processes that include a Facility Condition Assessment conducted by the State of Utah's Division of Facilities, Construction, and Management (DFCM) and the strategic planning process internal to the college. Board members engaged in discussion and expressed interest in repairing the leaky roof as quickly as possible. Paul confirmed emergency funds will be used to repair the roof over the Machining department, which is the most immediate need. Mark Smoot encouraged the college to let him and other board members know if they can do anything to acquire additional funds to get through critical facility repairs.

ACTION: Jack Draxler motioned to approve the FY 2024-2025 Capital Improvement Request as prioritized. Eric Wamsley seconded. Motion carried.

Item 8

Budget Request – Operating Budget

President Campbell explained the budget request process for all eight technical colleges has changed for fiscal year 2024-2025. Previously, the college could submit a detailed request for the expansion of existing programs or the creation of very new ones. Now, there are three new mechanisms for generating legislative funding. The first and primary method is performance measure funding. In addition to the performance funding, the commissioner's office is developing a new "growth funding" formula. The third method is Talent Ready Utah (TRU) grants designed to help meet the workforce needs in targeted industries. The targeted industries are statewide and chosen by TRU.

BTECH doesn't believe it will qualify for any performance measure funding or growth funding during the 2024 General Session of the Legislature. However, following guidance from the commissioner's office, submitting a budget request designed to identify how formula funds would be utilized should we receive any funding is still an important part of the process. It should be noted that unearned performance funds remain in a restricted account and will become available as soon as the metrics are met. Accordingly, the college recommends these operating budget request items, including Custom Fit and equipment, be approved so they are considered by the Utah Board of Higher Education and potentially the legislature.

The budget request is based on input from the strategic planning process, departmental advisory committees, instructional departments, and administrative analysis. Adjustments to this request may occur as the college responds to the board's direction and any additional guidance or direction that might come from the legislature and/or the commissioner. Still, it represents the best analysis of

business and industry demand concerning the college's ability to implement the request during the coming months. If approved by the UBHE, this request will be forwarded to the Governor's Office of Planning and Budget and the Office of the Legislative Fiscal Analyst on its way to consideration during the next General Session of the Utah State Legislature.

President Campbell reviewed each priority (attached). Eric Wamsley commended the college for continuing to keep in touch with the workforce and looking for growth opportunities to meet their needs.

ACTION: Roger Pulsipher motioned to approve the FY 2024-2025 budget request, including permission to update the request when guidance from the commissioner and/or the UBHE is available. Mark Smoot seconded. Motion carried.

Item 9

Policy Updates

Changes in laws and accreditation requirements prompt the majority of updates to policies and plans. Proposed changes are indicated with red (new) and strikethrough (omission). Jean Dunn reviewed the following policy changes and new policies:

- Policy 732 Withdrawal and the Return of Title IV Funds
- Policy 740 Professional Judgment
- NEW Policy 741 Provisional Independent Student Status, Homeless Youth Determination
- NEW Policy 770 Cost of Attendance

ACTION: Karina Brown motioned to approve the policy updates and new policies as outlined above. Jack Draxler seconded. Motion carried.

Item 10

FY 2022-2023 Strategic Planning Evaluation Results (Bi-Annual)

To provide a timely evaluation of progress toward achieving the objectives in the Strategic Plan, Administration created the Strategic Planning Evaluation Results document. This evaluation provides an opportunity for the college to celebrate successes and achievements primarily from December 2022 to July 2023. Emily Hobbs reported on the evaluation results (attached).

Item 11

Information Items

A. Custom Fit Training Department – Year-to-Date

Fiscal Year	Trainees	Training Hours	Total Companies	New Companies in Region (Moved in within the last 3 yrs)
21-22 Qtr 4	5,493	100,194	223	N/A
22-23 Qtr 4	4,537	80,262	215	14

B. Management of College Investments

Bridgerland Technical College's associate VP for finance & facilities, under the direction of the college president and the college Board of Trustees, invests the college funds in the Utah Public Treasurers' Investment Funds (UPTIF) and follows the rules of the Utah System of Higher Education,

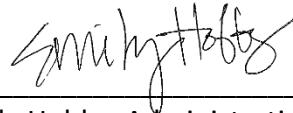
the State Money Management Act, and the rules of the State Money Management Council.
Quarterly investment reports were provided to the college president and the board (attached).

C. Calendar/Happenings

- Calendar available at btech.edu/event-calendars
 - September 7: Automation Technology Open House, West Building #3000, 6 p.m.
 - September 21: Brigham City Campus Family and Friends Night (Open House), 5 p.m.
 - October 9-13: Closed for Fall Break
 - October 18-19: Fall Fashion Show, Cache County Event Center, 7:30 p.m.
 - November 22-24: Closed for Holiday
 - December 1: North Pole Extravaganza, 4 p.m. (Cancelled due Health Building move)
 - December 7: General Graduation, 6 p.m.
 - December 21-January 2: Closed for Holiday
- Board Meeting Dates
 - December 4, 2023
 - March 18, 2024
 - June 24, 2024

Item 12

Adjournment



Emily Hobbs, Administrative Chief of Staff



**SUMMARY: Responsibilities and Authority of
USHE Governing and Administrative Officers**

The Utah System of Higher Education comprises 16 institutions, all with unique missions, but who are also working towards common goals and a unified vision. To ensure the system is efficient, effective, and delivers world-class instruction and research, the Board of Higher Education and institutional boards of trustees must align responsibility and authority. The Utah Legislature and the Board of Higher Education have established the following responsibilities and authorities for the Board, the boards of trustees, presidents, and the commissioner.

UTAH BOARD OF HIGHER EDUCATION	
STATUTORY AUTHORITY	STATUTORY RESPONSIBILITY
53B-1-402(1)(a)	The Board of Higher Education is the governing board for the institutions of higher education, which controls, oversees, and regulates the Utah System of Higher Education in a manner consistent with the purpose of this title and the specific powers and responsibilities granted to the board
53B-1-402(2)(a)	Establish and promote a state-level vision and goals for higher education that emphasize data-driven retrospective and prospective system priorities, including: <ul style="list-style-type: none"> • Quality • Affordability • Access and equity • Completion • Workforce alignment and preparation for high-quality jobs • Economic growth
53B-1-402(2)(b)	Establish system policies and practices that advance the vision and goals
53B-1-402(2)(c)	Establish metrics to demonstrate and monitor: <ul style="list-style-type: none"> • Performance related to the goals and • Performance on measures of operational efficiency
53B-1-402(2)(d)	Collect and analyze data, including economic data, demographic data, and data related to the metrics
53B-1-402(2)(e)	Govern data quality and collection across institutions
53B-1-402(2)(f)	Establish, approve, and oversee each institution's mission and role in accordance with Section 53B-16-101
53B-16-101(3)	The board shall further clarify each institution of higher education's primary role by clarifying: <ul style="list-style-type: none"> • The level of program that the institution of higher education generally offers, in accordance with Subsection 53B-16-102(3) • Broad fields that are within the institution of higher education's mission; and • Any special characteristics of the institution of higher education, such as being a land grant university
53B-1-402(2)(g)	Assess an institution's performance in accomplishing the institution's mission and role
53B-1-402(2)(h)	Participate in the establishment and review of programs of instruction in accordance with Section 53B-16-102
53B-1-402(2)(i)	Perform duties related to an institution of higher education president, including: <ul style="list-style-type: none"> • Appointing an institution of higher education president in accordance with Sections 53B-2-102 and 53B-2a-107 • Through the commissioner and the board's executive committee <ul style="list-style-type: none"> ○ Providing support and guidance to an institution of higher education president

	<ul style="list-style-type: none"> ○ Evaluating an institution of higher education president based on institution performance and progress toward system-wide priorities ○ Setting terms of employment, including performance-based compensation, through an employment contract or another method of establishing employment; and establishing, through a public process, a statewide succession plan to develop potential institution presidents from within the system
53B-1-402(2)(j)	<p>Create and implement a strategic finance plan for higher education, including by:</p> <ul style="list-style-type: none"> • Establishing comprehensive budget and finance priorities for academic education and technical education • Allocating statewide resources to institutions • Setting tuition for each institution • Administering state financial aid programs • Administering performance funding in accordance with Chapter 7, Part 7, Performance Funding • Developing a strategic capital facility plan and prioritization process in accordance with Sections 53B-2a-117 and 53B-2a-118 (commonly referred to as SB 102)
53B-1-402(2)(k)	<p>Create a seamless articulated education system for Utah students that responds to changing demographics and workforce, including by:</p> <ul style="list-style-type: none"> • Providing for statewide prior learning assessment, in accordance with Section 53B-16-110 • Establishing and maintaining clear pathways for articulation and transfer, in accordance with Section 53B-16-105 • Establishing degree program requirement guidelines, including credit hour limits • Aligning general education requirements across degree-granting institutions • Coordinating and incentivizing collaboration and partnerships between institutions in delivering programs • Coordinating distance delivery of programs • Coordinating work-based learning • Emphasizing the system priorities and metrics
53B-1-402(2)(l)	<p>Coordinate with the public education system:</p> <ul style="list-style-type: none"> • Regarding public education programs that provide postsecondary credit or certificates • To ensure that an institution of higher education providing technical education serves secondary students in the public education system
53B-1-402(2)(m)	<p>Delegate to an institution's board of trustees certain duties related to institution governance, including:</p> <ul style="list-style-type: none"> • Guidance and support for the institution president • Effective administration • The institution's responsibility for contributing to progress toward achieving system-wide goals • Other responsibilities determined by the Board
53B-1-402(2)(n)	<p>Delegate to an institution of higher education president management of the institution of higher education</p>
53B-1-402(2)(o)	<p>Consult with an institution of higher education board of trustees or institution of higher education president before acting on matters pertaining to the institution of higher education</p>
53B-1-402(2)(p)	<p>Maximize efficiency throughout the Utah system of higher education by identifying and establishing shared administrative services, beginning with:</p> <ul style="list-style-type: none"> • Commercialization • Services for compliance with Title IX • Information technology services • Human resources, payroll, and benefits administration
53B-1-402(2)(q)	<p>Develop strategies for providing higher education, including career and technical education, in rural areas</p>
53B-1-402(2)(r)	<p>Manage and facilitate a process for initiating, prioritizing, and implementing education reform initiatives beginning with common applications and direct admissions</p>
53B-1-402(2)(s)	<p>Provide ongoing quality review of programs</p>
53B-1-402(6)(c)	<p>The board shall conduct:</p> <ul style="list-style-type: none"> • At least once every seven years, at least one review of each program of instruction at each institution; and

	<ul style="list-style-type: none"> Annually, a qualitative and quantitative review of academic disciplines across the system, including enrollment, graduation rates, and workforce placement, ensuring that the board conducts a review of all disciplines within the system at least once every seven years.
53B-16-105(5)(a)	<p>Identify technical education programs with common names, descriptions, lengths, and objectives, and <i>within</i> technical education programs, common course names, descriptions, length, and objectives allowing for customization of electives to meet regional industry demand</p> <p>The commissioner shall appoint committees of faculty members from technical education committees to recommend aligned programs and courses that will satisfy graduation requirements.</p>
53B-1-402(2)(t)	Before each annual legislative general session, provide to the Higher Education Appropriations Subcommittee a prioritization of all projects and proposals for which the board or an institution of higher education seeks an appropriation.

BOARDS OF TRUSTEES & THE BOARD OF HIGHER EDUCATION			
STATUTORY GUIDANCE	RESPONSIBILITIES	DELEGATED AUTHORITIES	
		Delegated to Institutional Board of Trustees	Board of Higher Education
Guidance and support for the institution president--	Appointment of a President	Trustees may conduct the first phase of a search and submit finalists to the Board of Higher Education if authorized.	<p>The Board appoints president from among the finalists who serves at the pleasure of the Board.</p> <p>Board sets and adjusts presidential salaries by policy.</p> <p>Board may remove a president.</p>
	Evaluation of Presidents	Trustees establish Key Performance Indicators for presidents and annually evaluate a president's performance based on those KPI except the year a president is subject to a comprehensive evaluation.	<p>Board sets evaluation criteria and procedures for comprehensive evaluations.</p> <p>Board takes appropriate action based on presidential performance and recommendations, using identified benchmarks.</p> <p>Board conducts comprehensive evaluation every four years or if otherwise needed.</p>
The institution's responsibility for contributing to progress toward achieving system-wide goals	Institutional Master Planning, Strategic Planning and Goals	<p>Trustees approve a strategic plan for the institution that is aligned with: state attainment goals, workforce needs, and the institution of higher education's role, mission, and distinctiveness.</p> <p>Trustees set performance metrics in consultation with the Board of Higher Education.</p> <p>Trustees monitor the institution's progress toward achieving the strategic</p>	<p>Board sets and assesses system-wide performance on statewide goals and system performance metrics.</p> <p>Board requires institutions to provide a five-year capital plan, which the Board must approve.</p> <p>Institutions provide ongoing financial reporting.</p>

		<p>plan and report to the Board of Higher Education institutional progress.</p> <p>Trustees approve institutional master plan and associated changes. The trustees submit master plans and changes to the Commissioner's office.</p>	
<p>Effective Administration—In general, the Board of Higher Education will establish general parameters and reporting requirements and delegate day-to-day oversight to trustees and presidents.</p>	Institutional Missions & Roles	<p>Trustees approve institutional missions that align with the institution's role as established in statute and by the Board</p>	<p>Except as institutional roles are specifically assigned by the Legislature, the Board shall establish and define the roles of the institutions of higher education.</p> <p>The Board shall maintain institutional role integrity.</p> <p>Board adopts the institutional mission into policy.</p>
	Institutional Policies/System Policies	<p>Trustees approve institutional policies needed for the effective administration of the institution, ensuring they maintain parameters set by the Board of Higher Education.</p>	<p>The Board establish system policies and practices that advance the vision and goals</p>
	Tuition and Fees	<p>Institutions present tuition and fee needs to trustees; trustees are responsible to verify data supporting requests for increases in tuition or fees.</p> <p>Trustees, based on their assessment of the institution's request and underlying data, recommend tuition and fees increases to the Board.</p>	<p>Board establishes criteria trustees will use in evaluating tuition and fee requests.</p> <p>Board sets criteria and process trustees follow to conduct due diligence for tuition and fee requests.</p> <p>The Commissioner's office assesses whether the trustees have properly assessed the institution's request.</p> <p>Board reviews and may approve trustees' recommendations.</p>
	Budget and Finance Oversight	<p>Trustees establish and oversee internal accounting and operating controls, monitor use of discretionary funds, establish institutional debt policy, and oversee all auxiliary enterprises.</p>	<p>Board sets system parameters in policy and requires necessary reporting on budget and finance. The Board may intervene if institutions exceed parameters or policy.</p>
	Facilities	<p>Trustees may approve construction projects for new facilities less than \$500,000 and remodels or improvements of existing faculties less than \$3,500,000.</p> <p>Trustees may approved non-state funded projects that do not exceed \$5,000,000</p> <p>Trustees may approve property acquisition that does not exceed \$1,500,000. Disposal may not exceed \$1,000,000</p>	<p>Board sets system parameters in policy and requires necessary reporting on facilities.</p> <p>Board must approve capital projects that exceed threshold amounts.</p>

		<p>Trustees may approve capital Leases of less than \$250,000 a year (\$500,000 a year for the U of U).</p> <p>U of U trustees may approve all U of U Hospital/Health Sciences capital projects.</p> <p>Trustees review and may approve requests to submit to the Board for all other capital facilities.</p>	
	Audit	Trustees form the institution's internal audit committee, sets internal audit priorities, review internal audits and report audit findings at least annually to the Board of Higher Education.	Board audit committee identifies areas of risk within the system and prioritizes system audits accordingly.
	Academic Programs	Trustees approve new programs that fit within the institution's mission and role and meet Board of Higher Education criteria, subject to board review for pathway articulation.	<p>The board shall establish criteria for whether an institution of higher education may approve a new program of instruction, including criteria related to whether:</p> <ul style="list-style-type: none"> the program of instruction meets identified workforce needs; the institution of higher education is maximizing collaboration with other institutions of higher education to provide for efficiency in offering the program of instruction; the new program of instruction is within the institution of higher education's mission and role; and the new program of instruction meets other criteria determined by the board.
	Technical Education Programs	Trustees over technical colleges or institutions with a technical college role approve technical education programs that meet Board of Higher Education criteria.	Board of Higher Education establishes institutional missions and roles and criteria for new programming such as workforce demand. Institutions report all new programs to the Board.
	Program Review		<p>The board shall conduct a periodic review of all new programs of instruction no later than two years after the first cohort to begin the program of instruction completes the program of instruction.</p> <p>The board may conduct a periodic review of any program of instruction at an institution of higher education.</p> <p>The board shall conduct at least once every seven years, at least one review of each program of</p>

			instruction at each institution; and annually, a qualitative and quantitative review of academic disciplines across the system, including enrollment, graduation rates, and workforce placement, ensuring that the board conducts a review of all disciplines within the system at least once every seven years.
	Academic Degree Approval	Trustees review, consider and approve new institutional degree requests (certificates, associate, bachelor's, master's and doctoral), minors and emphases added to approved programs that conform to the institution's role and mission.	The Board of education may consider and approve new degree requests (certificates, associate, bachelors, masters, and doctoral) minors, and emphases added to approved programs that fall outside of the institution's role and mission.
	Research and Training Grants	Trustees approve research and training grant funding on behalf of the Board of Higher Education.	Institutions report grants annually to the Board. Institutions report highlights most impactful research.
	Community Relations/Advancement	Trustees facilitate communication between the institution and the community; assist in planning, implementing, and executing fund raising and development projects; and perpetuate and strengthen alumni and community identification with the institution's tradition and goals.	
	Honorary Degrees	Trustees approve recipients for honorary degrees or recognitions.	

INSTITUTIONAL PRESIDENTS	
ROLE	AUTHORITY
Leadership	<p>An institution of higher education president develops and implements the institution’s vision, mission and goals, and manages progress toward achieving institutional aims.</p> <p>The president of each institution of higher education may exercise grants of power and authority to ensure the effective and efficient administration and operation of the institution of higher education.</p> <p>The president also guides the contributions of their institution to the vision, mission and goals of the Utah system of higher education.</p> <p>The president is responsible to lead as part of a larger alliance of institutions whose presidents share a central mission to provide world-class, affordable higher education within the system of higher education. Presidents collaborate with and support each other, the commissioner and the Board for the benefit of all students and Utah.</p>

External Relations	<p>The president serves as the representative of their institution with key stakeholder communities, including but not limited to:</p> <ul style="list-style-type: none"> • Alumni • Private, Foundation and Corporate Donors • State and Federal Legislators and Other Governmental Leaders • Community Members and Non-Profit Partners • Employers, Industry • K-12 Education <p>The president is responsible for effective, high integrity stewardship of both relationships with and resources from external stakeholders.</p>
Faculty and Staff	<p>The president may:</p> <ul style="list-style-type: none"> • Appoint a secretary, a treasurer, administrative officers, deans, faculty members, and other professional personnel, prescribe their duties, and determine their salaries • Appoint support personnel, prescribe their duties, and determine their salaries from the institution of higher education's position classification plan • Where applicable, provide for the constitution, government, and organization of the faculty and administration, and enact implementing rules, including the establishment of a prescribed of tenure • Enact rules for administration and operation of the institution which are consistent with the prescribed role established by the board, rules enacted by the board, or the laws of the state <p>The president may exercise powers relating to the institution's employees, including but not limited to:</p> <ul style="list-style-type: none"> • Furloughs • Reductions in force • Benefit adjustments • Program reductions or discontinuance • Early retirement incentives that provide cost savings to the institution of higher education • Other measures that may provide cost savings to the institution of higher education
Strategic Planning/Master Planning	<p>Presidents develop and execute strategic plans that lead to their institutions achieving institutional and system-wide goals and performance metrics.</p> <p>Presidents develop and maintain an institutional master plans and five-year financial plans associated with the master plans. As part of the master planning process, presidents identify needed capital improvements or new facilities and submit requests and planning to the trustees for approval.</p>
Finance and Budget	<p>The president establishes priorities for fiscal resources in a manner that help the institution achieve institutional goals and objectives and system-wide goals and performance measures.</p> <p>The president oversees the institution's fiscal health, including setting budgetary priorities and requiring efficient and effective use of resources.</p>
Student Success	<p>The president establishes goals and initiatives that encourage student success and well-being, including areas of retention, graduation rates, affordability, safety and mental health, career and academic counseling, and workforce attachment.</p> <p>The president prioritizes, fosters and celebrates a vibrant, challenging and positive learning environment for the institution's students.</p>

COMMISSIONER OF HIGHER EDUCATION	
ROLE	AUTHORITY
Leadership	<p>The Commissioner develops and implements the system's vision, mission and goals, and manages progress toward achieving system aims.</p> <p>The Commissioner shall:</p> <ul style="list-style-type: none"> • Develop system strategic plan. • Ensure that the policies, programs align with the strategic plan and are properly executed. • Furnish information about the Utah system of higher education and make recommendations regarding that information to the Board. • Provide state-level leadership in any activity affecting an institution of higher education. • Develop and provide comprehensive training for Board members and trustees. • Perform other duties assigned by the board in carrying out the board's duties and responsibilities.
Coordination and Support for Presidents	<p>The Commissioner serves as chair of the council of presidents, the duties of which include coordinating of meeting agendas and Council recommendations to the Board, and facilitating communication and collaboration among the presidents.</p> <p>In consultation with the board's executive committee, evaluate and provide support and guidance to an institution of higher education president</p> <p>The Commissioner facilitates comprehensive presidential performance evaluations on behalf of the Board.</p> <p>The Commissioner may provide leadership, advice and consultation as may be sought by institutional Presidents or directed by the Board.</p>
Audit	<p>The Commissioner is empowered to require information and reports from the institutions.</p> <p>The Commissioner has the authority, after giving due notice to the president, to assign his or her staff to audit records of institutions or otherwise verify data. Such audits shall be in response to Board instructions or to verify compliance with Board policy or applicable law. The Board audit committee shall prioritize the Commissioner's audits.</p>
System Policy	<p>The Commissioner develops policy that addresses statewide issues impacting the system for the Board to consider and adopt.</p> <p>The Commissioner shall be responsible for interpreting Board policy. The president of any institution may appeal the Commissioner's interpretation of policy to the Board.</p>
Communication	<p>The Commissioner:</p> <ul style="list-style-type: none"> • Supports the work of individual presidents and serves as a liaison between presidents and the Board. • Directs continuous communication between the colleges and universities, the Board, and the Office of the Commissioner, related to problems and issues of common interest to the Utah System of Higher Education. • Establishes and maintains positive, productive relationships with the Board, the institutional presidents, the boards of trustees, and the legislative and executive branches of state government. <p>The Commissioner, in consultation with the Board and in collaboration with the presidents, shall develop system legislative priorities and strategies related to federal and state legislation and funding impacting higher education.</p> <p>The Commissioner is authorized to advocate on behalf of the Board before the Governor and his or her staff, the Legislature, and other officials and governmental entities.</p>
System Budget and Finance	<p>The Commissioner, in collaboration with the presidents, develops a unified budget request for the system and presents budget priorities for the Board to consider and adopt.</p>

OATH OF OFFICE

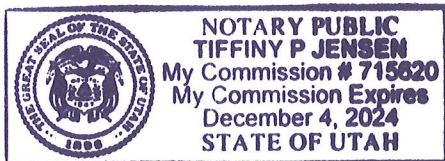
STATE OF UTAH

I, Nancy S. Kennedy having been elected or appointed to the office of
Member of the Board of Trustees of Bridgerland Technical College
do solemnly swear (or affirm) that I will support, obey and defend the Constitution of the
United States and the Constitution of the State of Utah, and that I will discharge the
duties of my office with fidelity. This oath is retroactive to my first day of service in this
office.

Nancy S. Kennedy
Signature

State of Utah,
County of CACHE

Subscribed and sworn to before me this 28th day of August, 2023



Tiffany Parker Jensen
*Person Administering Oath
HR Manager, Notary Public
Title

*Utah Code § 78B-1-142: "Every court, every judge, clerk and deputy clerk of any court, every justice, every notary public, and every officer or person authorized to take testimony in any action or proceeding, or to decide upon evidence, has the power to administer oaths or affirmations."

File oath by sending to: Oath of Office, Utah State Archives, 346 Rio Grande, Salt Lake City, UT, 84101

OATH OF OFFICE

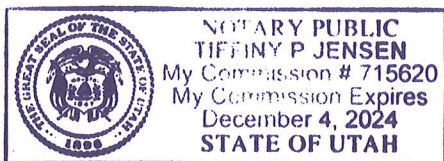
STATE OF UTAH

I, Paul Nelson, having been elected or appointed to the office of
Member of the Board of Trustees of Bridgerland Technical College
do solemnly swear (or affirm) that I will support, obey and defend the Constitution of the
United States and the Constitution of the State of Utah, and that I will discharge the
duties of my office with fidelity. This oath is retroactive to my first day of service in this
office.

Paul Nelson
Signature

State of Utah,
County of CACHE

Subscribed and sworn to before me this 28th day of August, 2023



Tiffany Parker Jensen
*Person Administering Oath

HR Manager, Notary Public
Title

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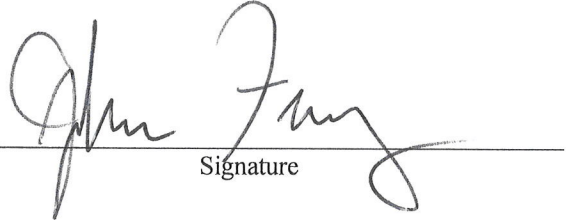
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OATH OF OFFICE

STATE OF UTAH

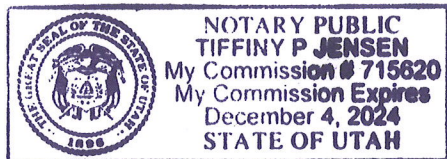
I, John Frazz, having been elected or appointed to the office of
Member of the Board of Trustees of Bridgerland Technical College

*do solemnly swear (or affirm) that I will support, obey and defend the Constitution of the
United States and the Constitution of the State of Utah, and that I will discharge the
duties of my office with fidelity. This oath is retroactive to my first day of service in this
office.*


Signature

State of Utah,
County of CACHE

Subscribed and sworn to before me this 28th day of August, 2023




*Person Administering Oath

HR Manager, Notary Public
Title

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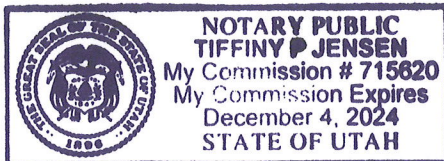
STATE OF UTAH

I, Larry Williams, having been elected or appointed to the office of
Member of the Board of Trustees of Bridgerland Technical College
do solemnly swear (or affirm) that I will support, obey and defend the Constitution of the
United States and the Constitution of the State of Utah, and that I will discharge the
duties of my office with fidelity. This oath is retroactive to my first day of service in this
office.

Larry Williams
Signature

State of Utah,
County of CACHE

Subscribed and sworn to before me this 28th day of August, 2023



Tiffany P. Jensen
*Person Administering Oath

HR Manager, Notary Public
Title

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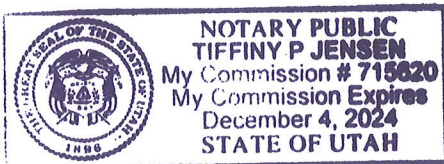
STATE OF UTAH

I, Karina Brown, having been elected or appointed to the office of
Member of the Board of Trustees of Bridgerland Technical College
do solemnly swear (or affirm) that I will support, obey and defend the Constitution of the
United States and the Constitution of the State of Utah, and that I will discharge the
duties of my office with fidelity. This oath is retroactive to my first day of service in this
office.

Karina Brown
Signature

State of Utah,
County of CACHE

Subscribed and sworn to before me this 28th day of August, 2023



Tiffany P. Jensen
*Person Administering Oath

HR Manager, Notary Public
Title

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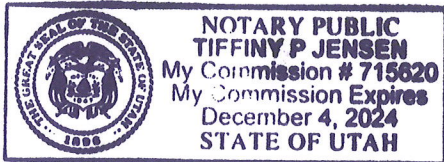
STATE OF UTAH

I, Roger Pulsipher, having been elected or appointed to the office of
Member of the Board of Trustees of Bridgerland Technical College
do solemnly swear (or affirm) that I will support, obey and defend the Constitution of the
United States and the Constitution of the State of Utah, and that I will discharge the
duties of my office with fidelity. This oath is retroactive to my first day of service in this
office.

Roger Pulsipher
Signature

State of Utah,
County of *CACHE*

Subscribed and sworn to before me this 28th day of August, 2023



Tiffany P Jensen
*Person Administering Oath

HR Manager, Notary Public
Title

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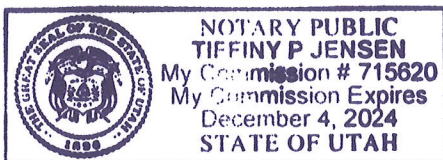
STATE OF UTAH

I, Eric Wamsley, having been elected or appointed to the office of
Member of the Board of Trustees of Bridgerland Technical College
do solemnly swear (or affirm) that I will support, obey and defend the Constitution of the
United States and the Constitution of the State of Utah, and that I will discharge the
duties of my office with fidelity. This oath is retroactive to my first day of service in this
office.

Eric Wamsley
Signature

State of Utah,
County of CACHE

Subscribed and sworn to before me this 28th day of August, 2023



Tiffany P. Jensen
*Person Administering Oath

HR Manager, Notary Public
Title

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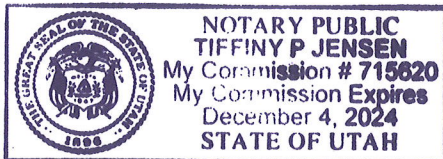
STATE OF UTAH

I, JACK DRAXLER, having been elected or appointed to the office of
Member of the Board of Trustees of Bridgerland Technical College
do solemnly swear (or affirm) that I will support, obey and defend the Constitution of the
United States and the Constitution of the State of Utah, and that I will discharge the
duties of my office with fidelity. This oath is retroactive to my first day of service in this
office.

Jack R. Draxler
Signature

State of Utah,
County of CACHE

Subscribed and sworn to before me this 28th day of August, 2023



Tiffany P. Jensen
*Person Administering Oath

HR Manager, Notary Public
Title

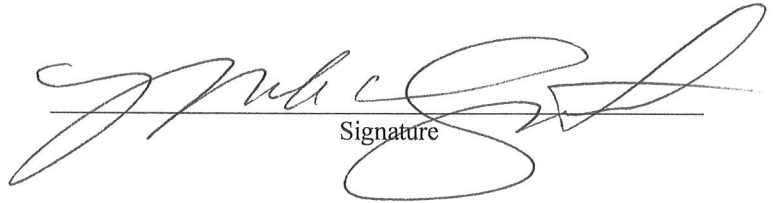
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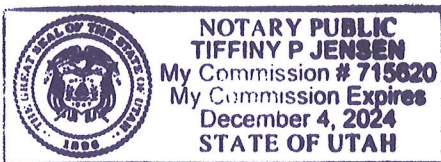
STATE OF UTAH


I, Mark Smoot, having been elected or appointed to the office of
Member of the Board of Trustees of Bridgerland Technical College
do solemnly swear (or affirm) that I will support, obey and defend the Constitution of the
United States and the Constitution of the State of Utah, and that I will discharge the
duties of my office with fidelity. This oath is retroactive to my first day of service in this
office.


Signature

State of Utah,
County of CACHE

Subscribed and sworn to before me this 28th day of August, 2023




*Person Administering Oath
HR Manager, Notary Public
Title

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Enrollment Summary
FY 2022-2023
Q4

Enrollment Objective	Membership Hours			Distinct Headcount			Certificates Awarded		
	2022	2023	MH %	2022	2023	HC %	2022	2023	CR %
Certificate Seeking	746,105	701,154	-6.02%	2,054	2,052	-0.10%	894	920	2.91%
Continuing Education	85,772	88,056	2.66%	1,881	2,002	6.43%			
High School	379,512	381,306	0.47%	1,807	1,857	2.77%	109	134	22.94%
Grand Totals	1,211,389	1,170,516	-3.37%	5,190	5,292	1.97%	1003	1054	5.08%

Distinct "Grand Totals" will not sum because a student can be enrolled in multiple enrollment objectives.

FY'25 Capital Improvement Project Requests Need Statement

Agency/Institution	Risk ID#	Building Name	Project Name and Description	FCA or other Project Justification Info.	Classification	Agency Priority	Early Design Yes/No	Requested Amount
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Culinary Arts safety and upgrades to lab, serving area, dining area (Phase 2).	Replace RTU-16 over the Culinary Arts serving and dining area. This air handler was installed more than 20 years ago and had a 10-year life cycle at the time. It is in desperate need of replacement. Since the area has to be closed during the construction overhead, it is the perfect time to replace wall coverings and floor coverings, update and modernize the HVAC control system, the fire alarm system, and other important deferred maintenance. Updating the north entrance will also be built into this improvement project assuming available funding. Completing this second phase will also result in a state-of-the-art serving and dining area to ensure current food safety guidelines and students and staff have a clean and safe gathering environment. The college recognizes some institutional funds may be required to complete the full scope of this project.	2-Critical	1	Yes	\$1,507,205
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Perimeter road connection to Logan City's new 1200 North on the south border of the college and minor extension of the south parking lot to square up the corner.	The City of Logan is building a new road on the south border of the college, which physically connects to our existing south parking lot. The existing perimeter road has a round corner that merges with the location of the new road. This merger between the perimeter road and 1200 North will create a life-safety issue for students who drive onto the campus unless the perimeter road is changed to intentionally connect to 1200 North. A defined entrance/exit to the campus needs created rather than having traffic haphazardly accessing the new road. This new road is to support the community development on the other side of the road, which is good for the community. In addition, with the ever increasing demand for parking spaces at the college, this project will provide a minor increase to the existing south parking lot.	1-Life Safety	2	No	\$350,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace BUR System with gravel ballast on the south end of the building.	The BUR roof covering has exceeded the typical Estimated Useful Life (EUL) of 20 years for this type of roof covering, and several leaks are appearing. Remove the BUR and ballast and replace them with single-ply PVC or similar roof material matching the rest of the building.	2-Critical	3		\$1,851,081
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Irrigation water source for landscaping rather than using culinary water.	Change lawn irrigation from culinary water to irrigation water. Install new pumps, frequency drives, expansion tank, and controls to enable the use of the artesian well that has already been drilled. By obtaining a diversion change utilizing secondary water shares, the well can be used for the irrigation system. This change will result in significant cost savings for the college.	3-Necessary	4		\$225,000

BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Campus beautification and water conservative landscaping.	Replace the current irrigation system and landscaping. The system that is being used currently is not very efficient and over waters in some places and starves other areas at the same time. There is a lot of wasted water. Replace the existing system with new watering technology using drip and other more efficient methods that conserve rather than waste water. Replace some of the turf grass landscaping with areas on xeriscape and other water efficient plantings. In addition, the existing irrigation system is connected to culinary water. The college owns a sufficient amount of water shares for its external landscaping needs but a complete overhaul of the irrigation system is critical to making use of the secondary water.	3-Necessary	5	\$750,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace RTU-17 - Auto/Diesel Classroom and Offices along with RTU-14 Business Classroom and Offices area.	The HVAC units were installed in 1999 and are approaching their useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency and make the temperature more comfortable. While working on the Roof Top Units and updating the HVAC System on the North and East side of the existing building, replacing floor coverings, wall coverings along with updating and modernizing that space is essential. Some of this space needs to be repurposed to facilitate the relocation of the main entrance to from the east to the north side of the building (connecting it to the Health Sciences building) and to get student services functions set up in a more efficient layout. The concept of like functions by like functions.	2-critical	6	\$1,600,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Building access management and door hardware standardization.	Building access for the Main and West buildings is aging, and the hardware is wearing out. Because of new technology and the installation of the updated hardware and software to monitor and control building access is being installed in the Health Sciences building, it makes it necessary to update and incorporate other buildings onto the same software platform. This will enable security to grant access to persons through one portal rather than two to three different programs.	3-Necessary	7	\$800,000
Subtotal - current request							\$7,083,286
			Future Needs of the College - Unprioritized				
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Upgrade building HVAC DDC System from INET to EcoStruxure Building Operation platform.	BTECH's Logan Campus - Main's Heating Ventilation and Air Conditioning (HVAC) control system has moved to the EcoStruxure Building Operation platform as modifications and upgrades are made. Most of the building, including the boilers, is currently on an outdated INET system. By upgrading the controls to the current EcoStruxure Building Operation platform program, the college will better control and monitor its building HVAC System.	3-Necessary		\$542,000

BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Fire Safety - Emergency fire sprinkler pipe and heads repair and update.	Fire Safety - Sprinkler heads and piping should be inspected and changed as required. Sprinkler heads have never been updated or changed in over 30 years. Piping is starting to fail and needs updating and replacing.	3-Necessary		\$1,000,000
BRIDGERLAND TECHNICAL COLLEGE	10004	Logan Campus - West	Fire Safety - Emergency fire sprinkler pipe and heads repair and update.	Fire Safety - Sprinkler heads and piping should be inspected and changed as required. Sprinkler heads have never been updated or changed in over 30 years. Piping is starting to fail and needs updating and replacing.	3-Necessary		\$500,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Floor replacement in circulation areas.	Replace the main hallway with durable flooring, update the corridor lighting to LED fixtures, and paint walls and overhead beams. This aesthetic update will reflect the College's goal of providing education that is current and high-tech. Life Safety Update: The flooring in the main hallway has been in place since the building was occupied in 1977. Some of the flooring has loosened and is uneven in areas, creating a tripping hazard.	2-Critical		\$949,080
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace sealant at expansion joints between tilt-up sections.	The exterior wall construction's expansion joint sealant between the tilt-up sections is in poor condition and needs to be replaced.	3-Necessary		\$20,000
BRIDGERLAND TECHNICAL COLLEGE	08441	Brigham City Campus	Brigham complex front entrance and enclosure.	As the drivers license division and rehabilitation services move to their new location, this facility needs to have a new enclosed front entrance for student and public access. This is for safety and efficiency reasons.	2-Critical	Yes	\$2,352,400
BRIDGERLAND TECHNICAL COLLEGE	08441	Brigham City Campus	Brigham City Campus renovation.	Brigham City Campus renovation to repurpose the vacated area to be used productively for programmatic instruction.	4-Programmatic	Yes	\$1,920,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace the single-ply roof on the north end of the building.	Remove the existing single-ply roofing material and install a new roofing system with the same warranty period as the south roof.	2-Critical		\$2,000,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace fluorescent lighting with LED.	The existing fluorescent lighting is approaching the end of its useful life. Replacement with higher efficiency LED fixtures or retrofits will increase the electrical efficiency and provide better lighting to areas.	3-Necessary		\$1,250,000
BRIDGERLAND TECHNICAL COLLEGE	10004	Logan Campus - West	Stucco repair and refinish.	The exterior of the Logan Campus – West building needs repairs and restoration. The building age, water damage, and birds have created several holes and made nests inside those holes. The College has made an effort to put up bird deterrent devices, but it is only somewhat effective.	3-Necessary		\$800,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Glazed skylights (reseal, replace with obscure glass, or remove).	The windows' glazed skylight systems and sealant are in poor to fair condition. Through exposure to moisture, heat, and ultraviolet radiation, the sealant has lost its movement capabilities due to the loss of plasticizers. A sealant such as this has a typical EUL of 15 years; therefore, it will need replacement with a suitable polyurethane sealant in the near term to maintain water integrity and prevent water penetration. There have been multiple issues with these skylights, so replacement or removal will improve the energy efficiency, functionality, and appearance.	2-Critical	20	\$1,000,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Walkway and parking lot lighting.	The parking lot and walkway lighting are insufficient to safely or efficiently use the parking lots and sidewalk. This is a life-safety concern because there isn't enough light for constituents to safely navigate between the Logan Campus buildings, parking lot, and obstacles therein. In addition, some of the existing lighting has been in place for more than 30 years and is highly inefficient. Replacing and adding to the current lighting with new LED systems is imperative.	1-Life Safety	22	\$50,000

BRIDGERLAND TECHNICAL COLLEGE	10004	Logan Campus - West	Logan Campus - West HVAC system upgrade Phase IV.	Replace air handlers, exhaust fans, ductwork, VAVs, VFDs, DDCs, heat exchangers, pumps, piping, and electrical connections, and demolition of the existing system. Rooms 1919, 1912, 1906, 1908, 1918, 1806, and 1835 need automated controls added with system upgrades to regulate classroom and lab air temperatures. The FCA estimated the total HVAC system retrofit/replacement cost at just over \$3.5 million. BTECH is requesting funding for Phase IV of the multi-year phased project. At \$550,000 per year, the project will take approximately seven years to complete.	3-Necessary	23	\$650,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	South parking lot reconfiguration and access points for safety.	The south parking lot of the Main building needs to be reconfigured with direct access points for safety and flow of traffic.	3-Necessary		\$816,000
BRIDGERLAND TECHNICAL COLLEGE	10004	Logan Campus - West	Interior exit doors.	Several of the rooms were retrofitted from manufacturing to accommodate classrooms, and the doors were designed to open in rather than out to allow for emergency exit. Replace the existing doors in these rooms to ensure the safe exit of the building in case of emergency.	1-Life Safety		\$50,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Fire safety - emergency fire alarm system.	Replace the current building fire and smoke monitoring system with an updated non-proprietary, addressable system with a voice feature to allow for announcements of the type of alarm and intercom features.	3-Necessary		\$1,500,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace plumbing fixtures, faucets, and flush valves along with restroom partitions.	Replace the current plumbing fixtures and faucets that have reached EUL with new water conserving fixtures and hardware.	3-Necessary		\$250,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace windows on the east side of the building (Student Services area and AVP area).	Replace the current aluminum window units with a more efficient window system. Doing this will eliminate large temperature swings and create a more comfortable work area.	2-Critical		\$200,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace the doors and openers rollup doors in the auto, diesel, auto collision, maintenance and carpenter shops (15 each).	Life Safety Issue - 15 doors need to be updated and repaired. Openers and doors are over 30 years old and do not have any of the current required safety systems installed. New insulated garage doors with new openers will increase safety and efficiency.	1-Life Safety		\$150,000
BRIDGERLAND TECHNICAL COLLEGE	10004	Logan Campus - West	Replace batten seam metal panels.	The metal panel roof covering appears to be in poor to fair condition, as the finish is starting to peel, and some rust is noted. Therefore, based on current condition and typical EUL of 30 years, replacement or refinishing is needed.	3-Necessary		\$375,000
BRIDGERLAND TECHNICAL COLLEGE	10004	Logan Campus - West	Replace flooring in the north and center hallways.	The flooring in the hallways on the north and center is wearing and is past its EUL. Recover the current vinyl tiles with carpet tile.	3-Necessary		\$750,000
BRIDGERLAND TECHNICAL COLLEGE	10004	Logan Campus - West	Replace fluorescent lighting with LED.	The existing fluorescent lighting is approaching the end of its useful life. Replacement with higher efficiency LED fixtures or retrofits will increase the electrical efficiency and provide better lighting to areas.	3-Necessary		\$125,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Interior floor and wall covering improvements, including exterior stucco and paint repairs.	The floor coverings are over 30 years old and urgently need replacement. The exterior stucco and metal needs to be inspected and repaired or painted.	3-Necessary		\$300,000
BRIDGERLAND TECHNICAL COLLEGE	10004	Logan Campus - West	Interior floor and wall covering improvements, including exterior stucco and paint repairs.	The floor coverings are over 30 years old and urgently need replacement. The exterior stucco and metal needs to be inspected and repaired or painted.	3-Necessary		\$450,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Dust collection system for Interior Design workshop.	A dust collection system needs to be added to the Interior Design work area to eliminate dust from woodworking and sanding procedures.	3-Necessary		\$10,000

BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Solar energy system installation with roof replacement (these projects need to be done together and in sequential order).	BTECH's roof is nearing the end of its estimated useful life and desperately needs an update and replacement. In addition, the nearly five acres of flat roof would make an excellent location for solar panels. These two projects are both worthy goals but need to be completed together. They impact each other and need to be coordinated.	3-Necessary	\$2,500,000
BRIDGERLAND TECHNICAL COLLEGE	10004	Logan Campus - West	Replace building chiller.	The 120-ton chiller was manufactured in 1996 and is approaching its useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency.	3-Necessary	\$250,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace RTU-1 - South West Wing.	The HVAC units were installed in 1999 and are approaching their useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency and make the temperature more comfortable.	3-Necessary	\$250,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace RTU-2 - South West Wing.	The HVAC units were installed in 1999 and are approaching their useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency and make the temperature more comfortable.	3-Necessary	\$250,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace RTU-3 - Exercise Rooms.	The HVAC units were installed in 1999 and are approaching their useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency and make the temperature more comfortable.	3-Necessary	\$250,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace RTU-4 - Dental.	The HVAC units were installed in 1999 and are approaching their useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency and make the temperature more comfortable.	3-Necessary	\$250,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace RTU-6 - Machine Shop Office Area.	The HVAC units were installed in 1999 and are approaching their useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency and make the temperature more comfortable.	3-Necessary	\$250,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace RTU-7 - Building Trades Area.	The HVAC units were installed in 1999 and are approaching their useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency and make the temperature more comfortable.	3-Necessary	\$250,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace RTU-9 - Custom Fit.	The HVAC units were installed in 1999 and are approaching their useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency and make the temperature more comfortable.	3-Necessary	\$250,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace RTU-10 - Machine Shop.	The HVAC units were installed in 1999 and are approaching their useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency and make the temperature more comfortable.	3-Necessary	\$250,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace RTU-13 - Student Services.	The HVAC units were installed in 1999 and are approaching their useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency and make the temperature more comfortable.	3-Necessary	\$250,000

BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace RTU-15 - Culinary Arts/Bookstore.	The HVAC units were installed in 1999 and are approaching their useful life expectancy. The refrigerant is no longer manufactured and is very expensive to acquire for use in repairs. Replacing this unit will increase energy efficiency and make the temperature more comfortable.	3-Necessary	\$250,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Replace Post Indicator Valves on the main water line to Fire Protection.	The Post Indicator Valves (PIV) serving the building fire risers were installed during the construction of the building in the 1960s. These valves need to be replaced, and new Post Indicators need to be installed to ensure the water to the building can be isolated as needed to service the systems.	3-Necessary	\$100,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Central Chiller for the building HVAC systems.	Install a central chiller, associated piping, and cooling coils to cool the main building. The current air conditioning systems are aging, and the type of Refrigerant R-22 is costly and getting very hard to find. Installing a chiller and piping cooling water throughout the building and HVAC units and removing the DX cooling would extend the life of the existing air handlers for many years.	4-Programmatic	\$1,000,000
BRIDGERLAND TECHNICAL COLLEGE	07471	Logan Campus - Main	Automotive exhaust removal system.	Install an overhead exhaust removal system that will replace the dilapidated system that is under the floor currently.	4-Programmatic	\$150,000
						\$31,592,766

Utah System of Higher Education

Form B-4: Institution Budget Needs Identification Form

Institution:

Bridgerland Tech College

FY2025 Operating Budget Request

Prepared by:

Chad Campbell

Brandi Gittins

Due Date:

August 14, 2023

Submission Date:

August 16, 2023

Institution Budget Priorities

Please list your institution's budget needs for FY2025 including category, title and amount

<u>Category</u>	<u>Priority Descriptive Title</u>	<u>Amount Requested</u>	
Tech College Growth	Priority #1 Automation	\$223,400	
Tech College Growth	Priority #2 CDL	\$223,400	
Tech College Growth	Priority #3 Orthodontic Assistant	\$303,800	
Tech College Growth	Priority #4 Nursing	\$651,500	
Tech College Growth	Priority #5 Apprenticeship	\$303,800	
	Total Performance/Growth Request		\$1,705,900
Tech College Growth	Custom Fit Expansion	\$250,000	
Tech College Equipment	Equipment (one-time)	\$350,000	
Total		\$2,305,900	

Utah System of Higher Education

Form B-4: FY2025 Institutional Operating Budget Request Detail

Institution: Bridgerland Tech College
Chad Campbell
Prepared by: Brandi Gittins
Due Date: August 14, 2023
Submission Date: August 16, 2023

Title: Priority #1: Automation Technology (InTech High School)

Requested Amount: \$ 223,400

1) Briefly describe the priority and what the institution intends to do with the requested funding.

Employers throughout Northern Utah and across the State of Utah are desperately trying to find qualified automation technicians. In an effort to increase the "pipeline" of qualified technicians, Bridgerland Technical College is working with a local charter high school to significantly increase the number of students who pursue "automation" as a career. By working with the charter high school, Bridgerland will provide the technical education while the charter school offers the academic courses. As a result, these high school students will graduate from high school but will also graduate or nearly graduate with a certificate from Bridgerland Technical College while still in high school. Likewise, those who don't complete the certificate while still in high school will graduate soon afterwards as a post-secondary student, which will help improve the "timely completion" performance funding metric for the college. While some charter schools are designed to help students who might be credit deficient, this particular charter high school is working with the best and the brightest students from all four school districts located in Bridgerland's statutorily defined service delivery area. Cultivating the pipeline from this group of students will be a win-win for the students and the employers who hire them.

2) How does the priority align with the institution's mission, and how will the funding enhance the ability to accomplish its mission?

"The mission of the Bridgerland Technical College is to deliver competency-based, employer-guided career and technical education to both secondary and post-secondary students through traditional and technology-enhanced methodologies. This hands-on technical education provides occupational education, skills training and workforce development to support the educational and economic development of the Bear River Region." This request is directly aligned with the college mission of providing local employers with the qualified workers they need and is both supported and requested by the respective occupational advisory committees, CEOs, administrators, and secondary CTE directors.

3) Justification:

a. Who are your industry/employer partners.

Bridgerland Technical College must have 123 local business leaders on advisory committees, but the college has more than 450. Employer partners in programs expanded with this request include Autoliv, Black Box Engineering, Casper's Ice Cream, Cytiva, Electric Power Systems, Fanuc, Northrop Grumman, Nucor Steel, Pepperidge Farms, POST Consumer Brands, Presto Products, SAE, Schreiber Foods, Thermo Fisher Scientific, West Liberty Foods, and West Point Dairy, just to name a few.

b.

Explain how this request will meet unmet workforce demand within your region (provide data documentation).

When fully funded, this request will increase capacity in this program almost overnight. High school students could fill this pipeline and be ready to enter the workforce while in high school or within a year of their graduation. The college will expand access into this program during the daytime and into the evening for the benefit of local employers and students, as well as implement simulation capabilities to broaden student experiences.

c. Is this program in a high wage/high demand area? If not, explain why it should be funded.

These programs are all high-wage/high-demand, which is especially true for supervisory positions. More importantly, there is a severe shortage of well-educated automation technicians in the Bear River Region and across the state. Automation technicians go directly into the workforce while continuing their education through stackable credential pathways at USU and other degree-granting institutions across the state.

d. If funded, when will this program/department begin enrolling/expanding programming for students?

This request is to expand existing programs so additional students will begin enrolling effective August 2024 (FY24-25).

e. Describe career pathways created or enhanced if funding is received. Identify industry/community partners.

Graduates from these high-wage/high-demand programs go directly into the workforce upon graduation. With the stackable credential pathway between BTECH, Utah State University and other degree-granting institutions in the state, there is an automatic pathway for these students to pursue additional higher learning as their personal and job goals dictate. Pursuing additional higher learning is not necessarily required to have a long and rewarding career, but it is available for those students who decide there will be value for them and their respective careers.

4) What goals/objectives is the institution planning to achieve with this funding and how will it track success?

The primary goals/objectives the college is planning to achieve with this funding is to increase the "pipeline" of students entering, progressing through, graduating, and entering the workforce immediately upon graduation so they are in a long-term career path in a related field. Besides the shortage of qualified workers, there is substantial student demand, which has limited access for secondary and post-secondary students. This funding will help reduce wait times in this high-demand program for both types of students and increase the number of students graduating, as shown in the table below.

5) Performance Measures/Outcomes:

a. What increases in production and outcomes does the institution anticipate?

i. Capacity (i.e. certificate seeking FTE)	24
ii. Completions (i.e. certificates)	24
iii. Workforce (i.e. job placements, economic impact)	22

b. Describe the economic impact to your service region if this funding is received.

All graduates from these programs will be in or well on their way to a high-wage/high-demand career field. Entry-level wages for these careers begin around \$25 per hour and go up quickly from there as they progress in their careers. It is evident in our advisory committee meetings and visits with local employers that they need well-trained technicians for their businesses to grow and to meet the extreme shortage of professionals in the region. These businesses are reaching out to the college and asking for help.

6) Performance Baseline (for existing program expansion)

a. What are the most recent outcome measures?

	Metric	Outcome
i.	Certificate seeking FTE	
ii.	Certificate completers	
iii.	Placements	

7) Budget:

a. Detail of projected expenditures

	Compensation	FTE
i. Faculty	211,400	1.5
ii. Staff		0
iii. Operating Expenses	12,000	
Total:	223,400	1.5

b. Current budget (existing programs or departments only)

793,200

c. Describe any internal efficiencies that have been utilized or could be utilized to augment this funding.

COVID-19 and the resulting slow down in the economy caused the Legislature to respond appropriately with a 2.5% budget reduction for higher education institutions. As a result, Bridgerland experienced several internal efficiencies or natural attrition to meet those budget reduction requirements near the end of FY 19-20 and during FY 20-21. One of the strategies used was to replace employees who retired or otherwise left the college due to budget reductions with hourly, part-time or hourly, full-time employees. While that type of temporary employee is less expensive in the very short term, it is not sustainable. The college has used some of the internal efficiency savings to not only cut the budget as required, but to staff ongoing programs and positions with these hourly employees. This request is to work on meeting enrollment demand by expanding these hourly

8) Describe any previous improvement strategies implemented within this department or program.

Updating and modernizing equipment and facilities for all our programs continue to be a high priority for the college. The Automation Technology program at Bridgerland has received a number of NSF and other grants to help it grow and progress. All of these grant funded sources have been exceptionally useful to ensure high quality curriculum and instruction. Because the grant funding sources are generally one-time in nature, continuation of the successes resulting from the grant requires on-going program funding.

9) To what extent is this request scalable? If a lower amount of funding is available, please articulate whether this would be effective and if so, what are the per-unit anticipated outcomes associated with lower funding increments?

This request isn't particularly scalable. We are asking for one full-time employee and one part-time employee and failure to fund both positions will limit the ability to expand.

Utah System of Higher Education

Form B-4: FY2025 Institutional Operating Budget Request Detail

Institution: Bridgerland Tech College

Chad Campbell

Prepared by:

Brandi Gittins

Title: Priority #2: Commercial Driver License (Brigham City Campus)

Due Date:

August 14, 2023

Submission Date:

August 16, 2023

Requested Amount: \$ 223,400

1) Briefly describe the priority and what the institution intends to do with the requested funding.

This request is to expand the existing Commercial Driver's License Class A program in response to the severe shortage of drivers throughout our region and across the state. Specifically, the college would expand the existing program to the Brigham City Campus. This request is for additional instructors for both classroom and over-the-road instruction. Because of the individualized nature of this training, the student/teacher ratio for the driving portion of the instruction is as low as 1:1. Accordingly, this request will result in the college hiring a number of part-time instructors.

2) How does the priority align with the institution's mission, and how will the funding enhance the ability to accomplish its mission?

"The mission of the Bridgerland Technical College is to deliver competency-based, employer-guided career and technical education to both secondary and post-secondary students through traditional and technology-enhanced methodologies. This hands-on technical education provides occupational education, skills training and workforce development to support the educational and economic development of the Bear River Region." This request is directly aligned with the college mission of providing local employers with the qualified workers they need and is both supported and requested by the respective occupational advisory committees, CEOs, administrators, and secondary CTE directors.

3) Justification:

a. Who are your industry/employer partners.

Bridgerland Technical College supports a number of local businesses with CDL drivers, including Admiral Beverage Corporation, Century Equipment Co., Dairyway Transport, Edge Excavation, Geneva Rock Products, Jack B. Parson Companies, JBS Carriers, Komatsu, L.W. Miller Companies, LeGrand Johnson Construction, Rupp Construction, Sharp Transportation, and Whitaker Construction Company, just to name a few. All of these companies along with many others serve on our Occupational Advisory Committee and all of them are experiencing driver shortages.

b.

Explain how this request will meet unmet workforce demand within your region (provide data documentation).

According to Talent Ready Utah, there is an extreme shortage of CDL drivers prompting several different TRU grant opportunities. The college already has a program at the Logan Main Campus and could expand to the Brigham City Campus in an effort to increase the number of drivers available for the workforce.

c. Is this program in a high wage/high demand area? If not, explain why it should be funded.

This program is high-wage/high-demand.

d. If funded, when will this program/department begin enrolling/expanding programming for students?

This request is for the expansion of existing programs so additional students will begin enrolling effective July 1, 2024 (FY24-25), which is the first day of the fiscal year for which funding is requested.

- e. Describe career pathways created or enhanced if funding is received. Identify industry/community partners.

Graduates from this high-wage/high-demand program go directly into the workforce upon graduation. With the stackable credential pathway in place between BTECH and USU (AAS Degree coupled with a new Bachelor's of Science in Technology Systems Degree), there is an automatic pathway for these students to pursue additional higher learning as their personal and job goals dictate. Pursuing additional higher learning is not necessarily required to have a long and rewarding career, but it is available for those students who decide there will be value for them and their respective careers.

- 4) What goals/objectives is the institution planning to achieve with this funding and how will it track success?

The primary goals/objectives the college is planning to achieve with this funding is to increase the "pipeline" of students entering, progressing through, graduating, and entering the workforce immediately upon graduation so they are in a long-term career path in a related field. Besides the shortage of qualified workers, there is substantial student demand, which has limited access for secondary and post-secondary students. This funding will help reduce wait times in this high-demand program for both types of students and increase the number of students graduating, as shown in the table below.

- 5) Performance Measures/Outcomes:

- a. What increases in production and outcomes does the institution anticipate?

i. Capacity (i.e. certificate seeking FTE)	24
ii. Completions (i.e. certificates)	48
iii. Workforce (i.e. job placements, economic impact)	43

- b. Describe the economic impact to your service region if this funding is received.

All graduates from these programs will be in or well on their way to a high-wage/high-demand career field. Entry-level wages for these careers begin around \$20 per hour and go up quickly from there as they progress in their careers. It is evident in our advisory committee meetings and visits with local employers that they need well-trained technicians for their businesses to grow. These businesses are reaching out to the college and asking for help.

- 6) Performance Baseline (for existing program expansion)

- a. What are the most recent outcome measures?

	Metric	Outcome
i.	Certificate seeking FTE	
ii.	Certificate completers	
iii.	Placements	

- 7) Budget:

- a. Detail of projected expenditures

	Compensation	FTE
i. Faculty	211,400	1.5
ii. Staff		
iii. Operating Expenses	12,000	
Total:	223,400	1.5

- b. Current budget (existing programs or departments only) 205,550

- c. Describe any internal efficiencies that have been utilized or could be utilized to augment this funding.

COVID-19 and the resulting slow down in the economy caused the Legislature to respond appropriately with a 2.5% budget reduction for higher education institutions. As a result, the college experienced several internal efficiencies or natural attrition to meet those budget reduction requirements near the end of FY 19-20 and during FY 20-21. One of the strategies used was to replace employees who retired or otherwise left the college due to budget reductions with hourly, part-time or hourly, full-time employees. While that type of temporary employee is less expensive in the very short term, it is not sustainable. The college has used some of the internal efficiency savings to not only cut the budget as required but to staff ongoing programs and positions with these hourly employees. This request is to work on meeting enrollment demand by expanding these hourly employees into long-term, benefits-eligible employees.

8) Describe any previous improvement strategies implemented within this department or program.

Commercial Driver's License training at Bridgerland Technical College was started without substantial appropriation funding from the Utah State Legislature. Accordingly, most of the cost to operate this program came from student tuition and fees. As part of the credit initiative, Bridgerland eliminated fees and standardized the tuition rate across all programs with the overall result being revenue neutral to the institution as a whole. By making that change however, funding the expansion of this program without legislative funding is not possible.

9) To what extent is this request scalable? If a lower amount of funding is available, please articulate whether this would be effective and if so, what are the per-unit anticipated outcomes associated with lower funding increments?

This request is not scalable. We have started expanding the capacity for this program using hourly part-time employees in an attempt to get a head start. However, this short-term solution as described above is not sustainable. Funding this request in full is the only way to move from using hourly employees to long-term, highly qualified, professional instructors.

Utah System of Higher Education

Form B-4: FY2025 Institutional Operating Budget Request Detail

Institution: Bridgerland Tech College

Chad Campbell

Prepared by: Brandi Gittins

Title: Priority #3: Orthodontic Assistant

Due Date: August 14, 2023

Submission Date: August 16, 2023

Requested Amount: \$ 303,800

1) Briefly describe the priority and what the institution intends to do with the requested funding.

Bridgerland Technical College is excited to be building its very first, new, purpose-built building designed to expand the capacity for healthcare-related training significantly. Putting this new Health Sciences building to work efficiently and productively in meeting the needs of health care employers in northern Utah and across the state will substantially improve enrollment and outcomes by expanding the number of faculty and staff. From the very beginning of the Capital Development Request process, the college has continuously communicated that it would take additional FTE positions. This request is for a new program being requested by local healthcare employers after becoming involved with the new building. It turns out there are openings for more than 200 orthodontic assistants in Northern Utah on an annual basis, and there are no publicly funded training programs available in the state. The orthodontists in the Bear River Region are asking for this new credential.

2)

How does the priority align with the institution's mission, and how will the funding enhance the ability to accomplish its mission?

"The mission of the Bridgerland Technical College is to deliver competency-based, employer-guided career and technical education to both secondary and post-secondary students through traditional and technology-enhanced methodologies. This hands-on technical education provides occupational education, skills training and workforce development to support the educational and economic development of the Bear River Region." This request is directly aligned with the college mission of providing local employers with the qualified workers they need and is both supported and requested by the respective occupational advisory committees, CEOs, administrators, and secondary CTE directors.

3) Justification:

a. Who are your industry/employer partners.

Bridgerland Technical College is required to have 123 local business leaders on our advisory committees but the College has more than 450. Employer partners in programs being expanded with this request include Guymon Orthodontics, Poole Orthodontics, Hlavaty Orthodontics just to name a few. Since this is a new program proposal, establishing an Occupational Advisory Committee is in progress.

b.

Explain how this request will meet unmet workforce demand within your region (provide data documentation).

According to the orthodontists requesting this program, there are more than 200 openings for orthodontic assistants just in Northern Utah alone. This program will provide an educated workforce in the Bear River Region and across the state since there aren't any other publicly funded programs available.

c. Is this program in a high wage/high demand area? If not, explain why it should be funded.

It has not been determined yet whether this program is high-wage/high-demand. Because this entry-level skill required by employers in this profession is a certificate-level credential and because this certificate is a stackable credential for dental assistants, it seems it should be considered high-wage/high-demand simply because employer demand exists and there aren't any publicly funded programs available.

d. If funded, when will this program/department begin enrolling/expanding programming for students?

This request is for the expansion of existing programs so additional students will begin enrolling effective July 1, 2024 (FY24-25), which is the first day of the fiscal year for which funding is requested. It should be noted that some work preparing and moving into the new Health Sciences building will impact the immediate enrollment of additional students so enrollment and outcome growth are somewhat contingent upon when the new facility becomes fully available.

e. Describe career pathways created or enhanced if funding is received. Identify industry/community partners.

Graduates from these high-wage/high-demand programs go directly into the workforce upon graduation. With the stackable credential pathway in place between BTECH and USU (AAS Degree coupled with a new Bachelor's of Science in Technology Systems Degree) there is an automatic pathway for these students to pursue additional higher learning as their personal and job goals dictate. Pursuit of additional higher learning is not necessarily required to have a long and rewarding career, but it is available for those students who decide there will be value for them and their respective careers.

4) What goals/objectives is the institution planning to achieve with this funding and how will it track success?

The primary goals/objectives the college is planning to achieve with this funding is to increase the "pipeline" of students entering, progressing through, graduating, and entering the workforce immediately upon graduation so they are in a long-term career path in a related field. Besides the shortage of qualified workers, there is substantial student demand, which has limited access for secondary and post-secondary students. This funding will help reduce wait times for both types of students and increase the number of students graduating, as shown in the table below.

5) Performance Measures/Outcomes:

a. What increases in production and outcomes does the institution anticipate?

i.	Capacity (i.e. certificate seeking FTE)	32
ii.	Completions (i.e. certificates)	32
iii.	Workforce (i.e. job placements, economic impact)	30

b. Describe the economic impact to your service region if this funding is received.

All of the graduates from these programs at the college will be in or well on their way to a high-wage/high-demand career field. Entry-level wages for these careers begin around \$20/hour and go up quickly from there as they progress in their careers. It is evident in our Occupational Advisory Committee meetings and visits with local employers that they need well-trained technicians for their businesses to grow. These businesses are reaching out to the college and asking for help.

6) Performance Baseline (for existing program expansion)

a. What are the most recent outcome measures?

	Metric	Outcome
i.	Certificate seeking FTE	
ii.	Certificate completers	
iii.	Placements	

7) Budget:

a. Detail of projected expenditures

	Compensation	FTE
i. Faculty	281,800	2
ii. Staff		
iii. Operating Expenses	22,000	
Total:	303,800	2

b. Current budget (existing programs or departments only)

N/A

c. Describe any internal efficiencies that have been utilized or could be utilized to augment this funding.

COVID-19 and the resulting slow down in the economy caused the Legislature to respond appropriately with a 2.5% budget reduction for higher education institutions. As a result, the college experienced several internal efficiencies or natural attrition to meet those budget reduction requirements near the end of FY 19-20 and during FY 20-21. One of the strategies used was to replace employees who retired or otherwise left the college due to budget reductions with hourly, part-time or hourly, full-time employees. While that type of temporary employee is less expensive in the very short term, it is not sustainable. The college has used some of the internal efficiency savings to not only cut the budget as required but to staff ongoing programs and positions with these hourly employees. This request is to work on meeting enrollment demand by expanding these hourly employees into long-term, benefits-eligible employees.

8) Describe any previous improvement strategies implemented within this department or program.

Updating and modernizing equipment and facilities for all of these programs has been and continues to be a high priority for the college. The college has received funding to build a new, purpose-built, Health Sciences building designed to significantly expand the capacity for Medical Assistant students in an effort to meet local demand, which is increasing along the Wasatch Front. This request for faculty is designed to quickly expand into the new facilities.

9) To what extent is this request scalable? If a lower amount of funding is available, please articulate whether this would be effective and if so, what are the per-unit anticipated outcomes associated with lower funding increments?

This request is not very scalable because it is for both a high school instructor to develop the pipeline of new students and for a post-secondary instructor to ensure quality graduates. Both positions would be needed to implement this new program and expansion to the Dental Assisting program.

Utah System of Higher Education

Form B-4: FY2025 Institutional Operating Budget Request Detail

Institution:	Bridgerland Tech College
	Chad Campbell
Prepared by:	Brandi Gittins
Due Date:	August 14, 2023
Submission Date:	August 16, 2023

Title: Priority #4: Practical Nursing

Requested Amount: \$ 651,500

- 1) Briefly describe the priority and what the institution intends to do with the requested funding.

Bridgerland Technical College is excited to be building its very first, new, purpose-built building designed to expand the capacity for healthcare-related training significantly. Putting this new Health Sciences building to work efficiently and productively in meeting the needs of healthcare employers in northern Utah and across the state, will substantially improve by expanding the number of faculty and staff. From the very beginning of the Capital Development request process, the college has continuously communicated that it would take 18 additional FTE positions. This request is for three and a half additional Masters prepared nursing instructors and one additional support staff position to expand the Practical Nursing program. According to the director of nursing at Logan Regional Hospital, the demand for nurses in the Bear River Region is higher than ever, with over 600 current open nursing positions in Intermountain Healthcare. Student demand for both secondary and post-secondary students is constantly growing, and the college has reached a point where demand is outpacing capacity. This request is designed to reduce the wait times for getting into the program. The college currently turns away three to five times as many qualified applicants as it accepts. Finding and retaining properly qualified instructors is dependent upon this funding. The college has attempted to fund this need through internal efficiencies using hourly, full-time and hourly, part-time employees. Because of the high turnover and inconsistent instruction that results from staffing with temporary employees, this request is essential to help students successfully enroll, progress through the curriculum, graduate, and go to work in the many jobs and careers available in the region.
- 2) How does the priority align with the institution's mission, and how will the funding enhance the ability to accomplish its mission?

"The mission of the Bridgerland Technical College is to deliver competency-based, employer-guided career and technical education to both secondary and post-secondary students through traditional and technology-enhanced methodologies. This hands-on technical education provides occupational education, skills training and workforce development to support the educational and economic development of the Bear River Region." This request is directly aligned with the college mission of providing local employers with the qualified workers they need and is both supported and requested by the respective occupational advisory committees, CEOs, administrators, and secondary CTE directors.
- 3) Justification:
 - a. Who are your industry/employer partners.

Bridgerland Technical College must have 123 local business leaders on advisory committees, but the college has more than 450. Employer partners in programs expanded with this request include Logan Regional Hospital, Cache Valley Hospital, Bear River Valley Hospital, Brigham City Hospital, Budge Clinic, long-term care facilities, and 100s of private medical and dental practices in the region, just to name a few.

b.

Explain how this request will meet unmet workforce demand within your region (provide data documentation).

When fully funded, this request will increase capacity in this program by more than 60 students almost overnight by adding two additional cohorts of approximately 30-34 students each. The college is currently turning away more than three to five times as many qualified applicants as can be accepted each year. Many students could fill this pipeline and be ready to enter the workforce within a year. The college will expand access into this program during the daytime and into the evening for the benefit of local employers and students, as well as implement simulation capabilities to broaden student experiences.

c. Is this program in a high wage/high demand area? If not, explain why it should be funded.

These programs are all high-wage/high-demand, which is especially true for supervisory positions. More importantly, there is a severe shortage of well-educated nurses in the Bear River Region and across the state. Practical Nursing graduates go directly into the workforce while continuing their education through stackable credential pathways, including RN, BSN, MSN, and even DNP.

d. If funded, when will this program/department begin enrolling/expanding programming for students?

This request is for the expansion of existing programs so additional students will begin enrolling effective July 1, 2024 (FY24-25), which is the first day of the fiscal year for which funding is requested. It should be noted that some work preparing and moving into the new Health Sciences Building will impact the immediate enrollment of additional students so enrollment and outcome growth are somewhat contingent upon when the new facility becomes fully available.

e. Describe career pathways created or enhanced if funding is received. Identify industry/community partners.

Graduates from these high-wage/high-demand programs go directly into the workforce upon graduation. With the stackable credential pathway between BTECH and Weber State University for nursing students, there is an automatic pathway for these students to pursue additional higher learning as their personal and job goals dictate. Pursuing additional higher learning is not necessarily required to have a long and rewarding career as a nurse, but it is available for those students who decide there will be value for them and their respective careers.

4) What goals/objectives is the institution planning to achieve with this funding and how will it track success?

The primary goals/objectives the college is planning to achieve with this funding is to increase the "pipeline" of students entering, progressing through, graduating, and entering the workforce immediately upon graduation so they are in a long-term career path in a related field. Besides the shortage of qualified workers, there is substantial student demand, which has limited access for secondary and post-secondary students. This funding will help reduce wait times in this high-demand program for both types of students and increase the number of students graduating, as shown in the table below.

5) Performance Measures/Outcomes:

a. What increases in production and outcomes does the institution anticipate?

i. Capacity (i.e. certificate seeking FTE)	68
ii. Completions (i.e. certificates)	68
iii. Workforce (i.e. job placements, economic impact)	64

b. Describe the economic impact to your service region if this funding is received.

All graduates from these programs will be in or well on their way to a high-wage/high-demand career field. Entry-level wages for these careers begin around \$25 per hour and go up quickly from there as they progress in their careers. It is evident in our advisory committee meetings and visits with local employers that they need well-trained nurses for their businesses to grow and to meet the extreme shortage of health care professionals in the region. These businesses are reaching out to the College and asking for help.

6) Performance Baseline (for existing program expansion)

a. What are the most recent outcome measures?

	Metric	Outcome
i.	Certificate seeking FTE	
ii.	Certificate completers	
iii.	Placements	

7) Budget:

a. Detail of projected expenditures

	Compensation	FTE
i. Faculty	493,200	3.5
ii. Staff	86,300	1
iii. Operating Expenses	72,000	
Total:	651,500	4.5

b. Current budget (existing programs or departments only)

1,352,500

c. Describe any internal efficiencies that have been utilized or could be utilized to augment this funding.

COVID-19 and the resulting slow down in the economy caused the Legislature to respond appropriately with a 2.5% budget reduction for higher education institutions. As a result, Bridgerland experienced several internal efficiencies or natural attrition to meet those budget reduction requirements near the end of FY 19-20 and during FY 20-21. One of the strategies used at Bridgerland was to replace employees who retired or otherwise left the College due to budget reductions with hourly, part-time or hourly, full-time employees. While that type of temporary employee is less expensive in the very short term, it is not sustainable. Bridgerland has used some of the internal efficiency savings to not only cut the budget as required but to staff ongoing programs and positions with these hourly employees. This request is to work on meeting enrollment demand by expanding these hourly employees into long-term, benefits-eligible employees.

8) Describe any previous improvement strategies implemented within this department or program.

Updating and modernizing equipment and facilities for all four of these programs continue to be a high priority for the College. With the help of Higher Education Emergency Relief Funds, Bridgerland has been systematically updating simulation capabilities in the existing nursing program. Bridgerland has remained open for face-to-face instruction throughout the Pandemic, but substantial changes have been made to incorporate simulation and virtual reality into the training. Local employers need nurses now more than ever, and we are working hard to meet their needs.

9) To what extent is this request scalable? If a lower amount of funding is available, please articulate whether this would be effective and if so, what are the per-unit anticipated outcomes associated with lower funding increments?

This request is not scalable. The only way to utilize the new facilities and increase enrollment is to have new faculty and staff.

Utah System of Higher Education

Form B-4: FY2025 Institutional Operating Budget Request Detail

Institution: Bridgerland Tech College
Chad Campbell
Prepared by: Brandi Gittins
Due Date: August 14, 2023
Submission Date: August 16, 2023

Title: Priority #5: Apprenticeship

Requested Amount: \$ 303,800

1) Briefly describe the priority and what the institution intends to do with the requested funding.

Bridgerland Technical College received a Talent Ready Utah Grant designed to update the existing apprenticeship programs along with adding high school pre-apprenticeship as a solution to the extreme shortage of construction workers in the state. The grant funding is only for FY22-23 and FY23-24. Accordingly, in an effort to make this available after the two introductory years, ongoing funding for faculty and staff is essential.

2) How does the priority align with the institution's mission, and how will the funding enhance the ability to accomplish its mission?

"The mission of the Bridgerland Technical College is to deliver competency-based, employer-guided career and technical education to both secondary and post-secondary students through traditional and technology-enhanced methodologies. This hands-on technical education provides occupational education, skills training and workforce development to support the educational and economic development of the Bear River Region." This request is directly aligned with the college mission of providing local employers with the qualified workers they need and is both supported and requested by the respective occupational advisory committees, CEOs, administrators, and secondary CTE directors.

3) Justification:

a. Who are your industry/employer partners.

Bridgerland Technical College is required to have 123 local business leaders on our advisory committees and the College has more than 450. Employer partners in programs being expanded with this request include 100s of contractors and sub-contractors in the region and across the state.

b.

Explain how this request will meet unmet workforce demand within your region (provide data documentation).

This request will increase capacity in this program by more than 30 new graduates each year. However, because this is apprenticeship and pre-apprenticeship and delivered over a four year period, new completion results won't be available for several years. With that said, after the first year of expansion with the grant, enrollment increased by almost 30%.

c. Is this program in a high wage/high demand area? If not, explain why it should be funded.

This program is high-wage/high-demand. More importantly, there is a severe shortage of well-trained electricians and plumbers along with the other apprenticeship trades in the Bear River Region and across the Wasatch Front.

d. If funded, when will this program/department begin enrolling/expanding programming for students?

This request is for the continuation of existing programs that have previously been funded with grant funds. These grant funds are only available for a two year period of time so continuation enrollments have already occurred and will continue to expand as ongoing funding becomes available. Failure to fund this in an ongoing manner will result in the college significantly reducing the output of construction workers in this region.

e. Describe career pathways created or enhanced if funding is received. Identify industry/community partners.

Apprenticeship students are already working in the industry and are receiving this training to advance themselves to the Journeyman level in their careers. The pre-apprenticeship students will get the entry-level training necessary to get a good job in the construction industry while also getting into the apprenticeship pipeline to advance their skills. While there are pathways leading to an associate or bachelors degree, it is unlikely many students will avail themselves of stackable pathways.

4) What goals/objectives is the institution planning to achieve with this funding and how will it track success?

The primary goals/objectives the college is planning to achieve with this funding is to increase the "pipeline" of students entering, progressing through, graduating, and entering the workforce immediately upon graduation so they are in a long-term career path in a related field. Besides the shortage of qualified workers, there is substantial student demand, which has resulted in limiting access for secondary and post-secondary students. This funding will help to reduce wait times in high demand programs for both types of students and will increase the number of students graduating as shown in the table below.

5) Performance Measures/Outcomes:

a. What increases in production and outcomes does the institution anticipate?

i. Capacity (i.e. certificate seeking FTE)	30
ii. Completions (i.e. certificates)	30
iii. Workforce (i.e. job placements, economic impact)	29

b. Describe the economic impact to your service region if this funding is received.

All of the graduates from these programs at the college will be in or well on their way to a high-wage/high-demand career field. Entry-level wages for these careers begin around \$20/hour and go up quickly from there as they progress in their careers. It is evident in our advisory committee meetings and visits with local employers that they need well-trained technicians for their businesses to grow. These businesses are reaching out to the college and asking for help.

6) Performance Baseline (for existing program expansion)

a. What are the most recent outcome measures?

	Metric	Outcome
i.	Certificate seeking FTE	
ii.	Certificate completers	
iii.	Placements	

7) Budget:

a. Detail of projected expenditures

	Compensation	FTE
i. Faculty	281,800	2
ii. Staff		
iii. Operating Expenses	22,000	
Total:	303,800	2

b. Current budget (existing programs or departments only) 194,100

c. Describe any internal efficiencies that have been utilized or could be utilized to augment this funding.

COVID-19 and the resulting slow down in the economy caused the Legislature to respond appropriately with a 2.5% budget reduction for higher education institutions. As a result, the college experienced several internal efficiencies or natural attrition to meet those budget reduction requirements near the end of FY 19-20 and during FY 20-21. One of the strategies used was to replace employees who retired or otherwise left the college due to budget reductions with hourly, part-time or hourly, full-time employees. While that type of temporary employee is less expensive in the very short term, it is not sustainable. The college has used some of the internal efficiency savings to not only cut the budget as required but to staff ongoing programs and positions with these hourly employees.

8)	Describe any previous improvement strategies implemented within this department or program. This request is to take improvement strategies and proof of concept opportunities made available through a two-year grant and expand that into ongoing funding. Following the first year of grant funding, the apprenticeship programs have grown substantially.
9)	To what extent is this request scalable? If a lower amount of funding is available, please articulate whether this would be effective and if so, what are the per-unit anticipated outcomes associated with lower funding increments? This request is not scalable.

Utah System of Higher Education

Form B-4: FY2025 Institutional Operating Budget Request Detail

Institution: Bridgerland Tech College

Prepared by: Chad Campbell
Sterling Petersen

Title: Priority # 1 - Custom Fit Line Item: Custom Fit

Due Date: August 14, 2023

Submission Date: August 16, 2023

Requested Amount: \$ 250,000

1)	Briefly describe the priority and what the institution intends to do with the requested funding. State Custom Fit funds at Bridgerland Technical College were completely obligated during FY 2022-2023 by the end of January 2023. This request is for an additional \$250,000 of Custom Fit funds to help local companies with training their employees and expanding the workforce.
2)	How does the priority align with the institution's mission, and how will the funding enhance the ability to accomplish its mission? N/A
3)	Justification: <div><div>a. Who are your industry/employer partners. N/A</div><div>b. Explain how this request will meet unmet workforce demand within your region (provide data documentation). N/A</div><div>c. Is this program in a high wage/high demand area? If not, explain why it should be funded. N/A</div><div>d. If funded, when will this program/department begin enrolling/expanding programming for students? N/A</div><div>e. Describe career pathways created or enhanced if funding is received. Identify industry/community partners. N/A</div></div>
4)	What goals/objectives is the institution planning to achieve with this funding and how will it track success? N/A

5) Performance Measures/Outcomes:

a. What increases in production and outcomes does the institution anticipate?

- i. Capacity (i.e. certificate seeking FTE)
- ii. Completions (i.e. certificates)
- iii. Workforce (i.e. job placements, economic impact)

b. Describe the economic impact to your service region if this funding is received.

6) Performance Baseline (for existing program expansion)

a. What are the most recent outcome measures?

- | | Metric | Outcome |
|------|-------------------------|---------|
| i. | Certificate seeking FTE | |
| ii. | Certificate completers | |
| iii. | Placements | |

7) Budget:

a. Detail of projected expenditures

	Compensation	FTE
i. Faculty		
ii. Staff		
iii. Operating Expenses	250,000	
Total:	250,000	-

b. Current budget (existing programs or departments only)

700,000

c. Describe any internal efficiencies that have been utilized or could be utilized to augment this funding.

N/A

8) Describe any previous improvement strategies implemented within this department or program.

N/A

9) To what extent is this request scalable? If a lower amount of funding is available, please articulate whether this would be effective and if so, what are the per-unit anticipated outcomes associated with lower funding increments?

N/A

Utah System of Higher Education

Form B-4: Technical College Equipment Form

Institution:

Bridgerland Tech College

Chad Campbell

FY2025 Operating Budget Request

Prepared by:

Brandi Gittins

Due Date:

August 14, 2023

Submission Date:

August 16, 2023

Institution Budget Priorities

Please list your institution's Equipment budget needs for FY2025 including title and amount

<u>Equipment Descriptive Title</u>	<u>Amount Requested</u>
Equipment	\$350,000
Total	\$350,000

NUMBER: 732

SUBJECT: WITHDRAWAL AND THE RETURN OF TITLE IV FUNDS – **CLOCK HOURS**

APPROVAL DATE OF LAST REVISION: JUNE 17, 2019; JUNE 21, 2021

REGULATORY CITATIONS: CODE OF FEDERAL REGULATIONS, TITLE 34, PART 668.22; HIGHER EDUCATION ACT (HEA) 485
FSA HANDBOOK VOLUME 5, CHAPTERS 1, 2, AND APPENDIX; FSA ASSESSMENTSPAGE 1 OF 5

732.1 – POLICY

This policy is a continuation of ~~the college's found in~~ Policy 606 *Withdrawals, Refunds, and Returns – Tuition, Fees, and Other Charges*. This Withdrawal and the Return of Title IV Funds policy specifically relates to students receiving Title IV Aid, also known as the Federal Pell Grant and commonly referred to as Federal Student Aid (FSA). **This policy specifically addresses withdrawal and the return of Title IV funds as it relates to clock hours.**

Title IV (Pell Grant) funds are awarded to a student under the assumption that the student will attend school for the entire period for which assistance is awarded. Funds are earned by being enrolled, attending, and completing progress hours for the payment period or period of enrollment for which a student is paid or scheduled to be paid. When a student withdraws, the student may no longer be eligible for the full amount of Title IV funds originally scheduled to be received. The amount of funds earned is determined on a pro-rata basis. This means, if a student completes 30 percent of a payment period or period of enrollment, the student earns 30 percent of the assistance scheduled to be received. If the day the student withdraws occurs after the student has completed more than 60 percent of a payment period or period of enrollment for which the student was awarded, the percentage earned is 100 percent.

If a student withdraws from school during a payment period or period of enrollment in which the student began attending, the student may have received an overpayment of Title IV funds. The college must calculate how much of the funds the student is eligible to retain and how much aid must be returned by using formulas provided by the Department of Education for the Treatment of Title IV Funds When A Student Withdraws From A Clock-Hour Program (hereafter called the Return). If it is determined that a student received more Title IV funds than the student earned – the college, the student, or both, must return (repay) the unearned funds. If the amount disbursed to the student is less than the amount the student earned, and for which the student is otherwise eligible, the student may be eligible to receive a post-withdrawal disbursement of the earned aid that was not received. The amount of Title IV aid a student has earned under the Return calculation is not affected by and does not affect the institutional charges a student will be responsible for after withdrawing. Institutional charges previously paid using Title IV funds may become a debt that the student is responsible to pay. See Policy 606 for more information.

732.1.1 – GRADUATION EXCEPTION – RE-PRORATION

As per the Distance Education and Innovation final rules published September 2, 2020, and effective July 1, 2021: A student who completes all requirements for graduation without successfully completing all of the established hours in the program does not earn 100% of funds by completing more than 60% of the payment period and is not subject to the Return calculation. Instead, the school must re-prorate the amount of Title IV aid and only pay the student for the hours successfully completed.

Example – A student is enrolled in a 900-clock hour program with two 450-hour payment periods. Part way through the second 450-hour payment period (at hour 300), the student completes all of the academic requirements (competencies, coursework, etc.) to graduate and graduates from the program after only completing 750 hours in the program. The school must prorate all Title IV funds and only pay the student for a total of 750 hours, instead of paying for 900 hours.

Upon request by the student, the Financial Aid Office will provide the student with an estimate of how much federal student aid the student will retain (or may receive as a post-withdrawal disbursement) and, conversely, how much the student may have to return (repay) upon withdrawal.

732.2 – STUDENT WITHDRAWAL – WHEN A STUDENT IS CONSIDERED WITHDRAWN

When a student ceases attendance (drops or withdraws) from **all** their courses in a Title IV eligible program in a payment period or period of enrollment, the student must be considered a “withdrawal” for Title IV (Pell Grant) purposes and will also be considered a “withdrawal” from the college.

NUMBER: 732

SUBJECT: WITHDRAWAL AND THE RETURN OF TITLE IV FUNDS – **CLOCK HOURS**

APPROVAL DATE OF LAST REVISION: JUNE 17, 2019; JUNE 21, 2021

REGULATORY CITATIONS: CODE OF FEDERAL REGULATIONS, TITLE 34, PART 668.22; HIGHER EDUCATION ACT (HEA) 485
FSA HANDBOOK VOLUME 5, CHAPTERS 1, 2, AND APPENDIX; FSA ASSESSMENTSPAGE 2 OF 5

A student is considered to have withdrawn from a payment period or period of enrollment if:

- In the case of a program that is measured in clock hours, the student does not complete all of the clock hours and weeks of instructional time in the payment period (or period of enrollment) that the student was scheduled to complete – unless the student is on an approved Leave of Absence as defined by the college's policy. (See Section 600). A student requesting a Leave of Absence must include their reason for submitting the request so that an expectation of return may be determined.
- A student has not attended ten consecutive school days in his or her Title IV eligible program.
- Students may also be considered withdrawn for reasons including officially or unofficially withdrawing, completing requirements for graduation, providing notification of intent to withdraw, being suspended or violating terms of the probationary contract.

The withdrawal date for Title IV purposes will always be the last date of the student's documented attendance.

732.3 – TREATMENT OF TITLE IV CREDIT BALANCES

When a student withdraws and a Title IV credit balance is created, no portion of the Title IV credit balance should be released to the student or returned to the Title IV programs until after the Return or re-proration calculation is complete. Any Title IV credit balance following the calculation must be allocated first to repay any grant overpayment owed by the student. Any remaining funds will then be applied to outstanding institutional charges before being released to the student.

732.4 – CALCULATING EARNED AND UNEARNED AID – THE RETURN

Return of Title IV Funds requires Bridgerland Technical College to determine the earned and unearned portions of Title IV aid a student has received. Determinations are made as of the date the student ceases attendance based on the amount of time the student, in the case of a clock-hour program, was scheduled to be in attendance. If a recipient of Title IV aid withdraws after beginning attendance, the amount (earned or unearned) is determined by the Financial Aid Office using formulas provided by the Department of Education for the Treatment of Title IV Funds When A Student Withdraws From A Clock-Hour Program. Students who complete requirements for graduation without successfully completing all of the established hours in the program are not subject to the Return calculation described in this section. See Graduation Exception – Re-proration above for information on how to calculate earned and unearned aid.

Institutional charges used in the calculation are generally defined as tuition and fees, required books, ~~tools~~ **course materials**, supplies and ~~other educational expenses~~ **equipment, including all such costs as required of all students in the same course of study**, paid directly to the school for the successful completion of the program in which the student is enrolled. Up through the 60 percent point of the payment period or period of enrollment in which the student withdraws, the college will pro-rate the total charges for the program in which the student is enrolled to correspond with the payment period or period of enrollment. Dollars and cents will be rounded to the nearest penny using standard rounding rules in the Return calculation. If the amount disbursed to the student is greater than the amount the student earned, the unearned funds must be returned by the student to the college. If the amount disbursed to the student is less than the amount the student earned, and for which the student is otherwise eligible, the student may be eligible to receive a post-withdrawal disbursement of the earned aid that was not received. Final repayment or post-withdrawal disbursement amounts will be rounded to the nearest dollar.

Standard rounding rules will not be applied when calculating the percentage of Title IV assistance earned. Once more than 60 percent of the payment period or period of enrollment has been completed, a student has earned 100 percent of the Title IV funds they were scheduled to receive during that period. For a student who withdraws after the 60 percent point-in-time, there are no unearned Title IV funds. The college's Financial Aid Office must still determine if the student is eligible for a post-withdrawal disbursement.

NUMBER: 732

SUBJECT: WITHDRAWAL AND THE RETURN OF TITLE IV FUNDS – **CLOCK HOURS**

APPROVAL DATE OF LAST REVISION: JUNE 17, 2019; JUNE 21, 2021

REGULATORY CITATIONS: CODE OF FEDERAL REGULATIONS, TITLE 34, PART 668.22; HIGHER EDUCATION ACT (HEA) 485
FSA HANDBOOK VOLUME 5, CHAPTERS 1, 2, AND APPENDIX; FSA ASSESSMENTSPAGE 3 OF 5

732.4.1 – Payment period or period of enrollment is defined as a period of time for which a student has been awarded and is scheduled to receive Title IV aid (Pell Grant). The period for which the student has been awarded is the same period used in the Return calculation.

732.4.2 – A student completes a payment period or period of enrollment by being enrolled in, attending, and demonstrating successful completion of coursework associated with the student's program of enrollment. See the Satisfactory Progress Policy 700.703 for more information.

732.5 – UNEARNED FUNDS – OVERPAYMENTS

When a student withdraws from school during a payment period in which the student was paid and began attending, and did not earn all funds received, the student may have received an overpayment of FSA funds. When it is determined that a student received more assistance than the amount earned – the school, the student, or both, must return (repay) the unearned funds.

732.5.1 – INADVERTENT OVERPAYMENT

Inadvertent Overpayment may occur as a result of being paid a payment after the student has withdrawn. This may happen when enrollment is confirmed and the payment is processed, but later the student withdraws with an earlier exit date. In cases such as this, the Return or re-proration calculation may not occur for that payment. The student may be subject to repay the full amount of this overpayment.

732.5.2 – WHEN A RESOLVED OVERAWARD BECOMES AN OVERPAYMENT

This may occur when a student reduces enrollment, which in turn reduces his or her Title IV aid eligibility. If the school has resolved the overpayment by reducing scheduled future disbursements for a current or subsequent payment period and the student withdraws before the end of the payment period or before earning the overpaid amount, the portion of the student's award that was an overpayment must be repaid outside of the Return or re-proration calculation.

The student should be notified in writing by the Financial Aid Office within 30 days of the date of the institution's determination that the student withdrew of any overpayment the student has received with direction on how any overpayment may be repaid. Students are responsible to repay any overpayment to the college within 30 days. If a student owes an overpayment and sufficient funds are available on the student's account, the college will use those funds to repay the overpayment. If sufficient funds are not available on the student's account, the student will be given 30 days to make payment in full to the college. Failure to repay these funds or make acceptable repayment arrangements within 30 days will result in the obligation being turned over to the State of Utah Division of Collection Services. The Department of Education may also be notified which may result in jeopardizing future financial aid eligibility at the college or any other school.

Regulations require institutions to return unearned funds within 45 days of the student's withdrawal or the date of the institution's determination that the student withdrew. Schools must return Title IV Program funds in a particular order (Loans, Pell Grant, and Other grants). Since the college only offers the Pell Grant, this order is immaterial.

NUMBER: 732

SUBJECT: WITHDRAWAL AND THE RETURN OF TITLE IV FUNDS – **CLOCK HOURS**

APPROVAL DATE OF LAST REVISION: JUNE 17, 2019; JUNE 21, 2021

REGULATORY CITATIONS: CODE OF FEDERAL REGULATIONS, TITLE 34, PART 668.22; HIGHER EDUCATION ACT (HEA) 485
FSA HANDBOOK VOLUME 5, CHAPTERS 1, 2, AND APPENDIX; FSA ASSESSMENTSPAGE 4 OF 5

732.6 – EARNED FUNDS – POST-WITHDRAWAL DISBURSEMENT

A post-withdrawal disbursement is a payment made after a student withdraws from a program, for hours the student has already completed and would have been eligible to receive payment, but for whatever reason, had not been paid while enrolled. Students should be notified by the Financial Aid Office within 30 days of the institution's determination that the student withdrew of the amount and availability details of the disbursement. Post-withdrawal disbursements will be made on the earliest pay date possible following the withdrawal and within 45 days of the date the school determined the student withdrew. Post-withdrawal disbursements are only available if the college received a valid output document (ISIR) while the student was enrolled prior to withdrawal.

A post-withdrawal disbursement, if applicable, will be prepared and available for the student at the Student Services Office. Any remaining or unpaid charges on the student's Accounts Receivable account(s) will be collected for the student at the time funds are placed on the student's Accounts Receivable account, or the post-withdrawal disbursement check is picked up by the student. Additional amounts due, if any, will be immediately due and payable to the college. Additional amounts owed to the student, if any, will be returned to the student in accordance with the college's refund policies.

732.7 – WITHDRAWAL AND REENTRY

Regulation dictates the treatment of a student who withdraws from school and then reenters the same program at the same school. Students reentering after withdrawal should immediately upon their return contact the Financial Aid Office to have their reinstatement for aid considered.

732.7.1 – REENTRY WITHIN 180 DAYS

A student who reenters within 180 days is considered to be in the same payment period they were in at the time of the withdrawal. The student retains their original eligibility for that payment period, and the school may restore the aid that the student was eligible for before the student ceased attendance and schedule any appropriate disbursements. Actions to be taken by the school may include redispersing aid that had been disbursed and then returned under the Return calculation; dispersing aid the student was otherwise eligible for that had not yet been disbursed at the time the student withdrew; and canceling any overpayments assessed to the student as a result of the prior withdrawal if those funds were scheduled to be disbursed upon reentry. Once the student completes the payment period for which the student has been paid, the student may become eligible for subsequent Title IV aid payments.

For a student who completed more than 60 percent of the period for which the student was paid before ceasing attendance, the school would not have returned any Title IV aid. If that student were to reenter school within 180 days, because the student had received 100 percent of his or her aid for the period, the student would not be eligible to receive additional Title IV aid until he or she has completed the weeks of instructional time and hours for which the student was previously paid.

732.7.1.1 – WHEN A STUDENT REENTERS IN A NEW AWARD YEAR

A student who was originally enrolled in a payment period that began, and was scheduled to end, in one award year could return after the end of that award year (June 30). However, the regulations intend that such a student is to be considered, upon their return, to be in the same period. Any Title IV funds that could be disbursed to the student should be paid from the original award year regardless of whether the resumption of the payment period is in a new award year. It is possible that a student is eligible for additional funds from an award year that is closed (typically the end of September after the official end of an award year). In such cases, schools are authorized to request an extension to report additional disbursement information and request additional funds.

NUMBER: 732

SUBJECT: WITHDRAWAL AND THE RETURN OF TITLE IV FUNDS – **CLOCK HOURS**

APPROVAL DATE OF LAST REVISION: JUNE 17, 2019; JUNE 21, 2021

REGULATORY CITATIONS: CODE OF FEDERAL REGULATIONS, TITLE 34, PART 668.22; HIGHER EDUCATION ACT (HEA) 485
FSA HANDBOOK VOLUME 5, CHAPTERS 1, 2, AND APPENDIX; FSA ASSESSMENTS

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732.7.1.2 – WHEN A STUDENT REENTERS INTO A SECOND PROGRAM

If a student withdraws from one program without completing the payment period and reenters the college in a second program within 180 days after the withdrawal, and is otherwise eligible, the student starts a new payment period for the second program when the student reenters. Return or re-proration calculations completed appropriately for withdrawal from the first program will apply.

732.7.2 – REENTRY AFTER 180 DAYS

If a student withdraws from a clock-hour program without completing the payment period and reenters the same program, or transfers into a second program, more than 180 days after the withdrawal, and is otherwise eligible to receive Title IV aid, the student starts a new payment period when the student reenters.

As outlined in the Satisfactory Academic Progress Policy 703, a student's demonstrated academic progress status at the time of withdrawal will be their status upon reentry. See the complete policy for more information about this as well as Title IV eligibility for enrollment in more than one program.

732.8 – ITEMS OF CONSIDERATION

As it is impossible to appropriately address all conceivable scenarios regarding a student's withdrawal and the effect it may have on any calculation, situations beyond those described here will be researched in existing regulation and guidance and addressed on a case-by-case basis.

In an ongoing effort to maintain the rules set forth by federal regulation, there may be changes made to this policy pending the approval of the college Board of Trustees. Any changes may be in effect by practice by the Financial Aid Office to which both the college and its students may be required to observe.

NUMBER: 740

SUBJECT: PROFESSIONAL JUDGMENT

APPROVAL DATE OF LAST REVISION: MARCH 6, 2023

SOURCE(S): FAFSA SIMPLIFICATION ACT; 20 USC 1087TT, TITLE 20, CHAPTER 28, PART F; FSA HANDBOOK, APPLICATION AND VERIFICATION GUIDE, CHAPTER 5, SPECIAL CASES

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740.1 – INTRODUCTION TO EXERCISING PROFESSIONAL JUDGMENT

Analysis of a student's need for federal student aid is based on a standardized assessment of family financial strength relative to all other aid applicants. On rare occasions, however, a student or family may experience special circumstances and/or unusual circumstances that make the standardized approach unsuitable. In such individual cases, with adequate documentation, students may request an adjustment based on their special or unusual circumstances. A financial aid administrator may then use their professional judgment to assess that student's need more accurately by overriding the student's dependency status, adjusting the data used to calculate the expected family contribution (EFC)/student aid index (SAI) or the Federal Pell Grant offer, or revising the student's cost of attendance (COA).

All conditions to be considered for professional judgment must differentiate an individual student from a group of students and be based on special circumstances or unusual circumstances. A professional judgment request may result in additional eligibility for the Federal Pell Grant; however, submission of a request does not guarantee approval. It is possible that a request demonstrating a significant adjustment may not affect overall eligibility.

740.2 – CATEGORIES OF PROFESSIONAL JUDGMENT

Terminology matters. Effective with the 2023-2024 award year, changes to the Higher Education Act, as amended, make a distinction between special circumstances and unusual circumstances.

740.2.1 – SPECIAL CIRCUMSTANCES

Special circumstances refer to financial situations that justify an aid administrator adjusting data elements in the COA or in the EFC/SAI calculation. Examples of special circumstances that may be considered include change in employment status, income, or assets; change in housing status; tuition expenses at an elementary or secondary school; medical, dental, or nursing home expenses, not covered by insurance; child or dependent care expenses; severe disability of the student or other member of the student's household; other changes or adjustments that impact the student's costs or ability to pay for college.

The financial aid administrator must be able to distinguish between changes in a family's circumstances that are a function of choice, and those that are a function of necessity. Using this distinction in expenses helps the financial aid administrator make better decisions about a given family's circumstances. Discretionary debts are expenses that will not be considered.

740.2.2– UNUSUAL CIRCUMSTANCES

Unusual circumstances refer to conditions that justify an aid administrator making an adjustment to a student's dependency status based on a unique situation (e.g., human trafficking, refugee or asylee status, parental abuse or abandonment, incarceration). This adjustment is more commonly referred to as a dependency override and allows the aid administrator to override a student's status from dependent to independent.

Unusual circumstances do not include a parent's refusal to contribute to the student's education, a parent's refusal to provide information for the FAFSA or verification, a parent that does not claim the student as a dependent for income tax purposes, or a student who demonstrates total self-sufficiency.

Beginning with the 2023-24 award year, financial aid administrators may use a dependency override made at the college in a prior award year in subsequent years at the college, unless the college is informed by the student that the student's situation has changed, or the college has conflicting information about the student's independence. Dependency overrides made by another school may or may not be accepted at the college.

NUMBER: 740

SUBJECT: PROFESSIONAL JUDGMENT

APPROVAL DATE OF LAST REVISION: MARCH 6, 2023

SOURCE(S): FAFSA SIMPLIFICATION ACT; 20 USC 1087TT, TITLE 20, CHAPTER 28, PART F; FSA HANDBOOK, APPLICATION AND VERIFICATION GUIDE, CHAPTER 5, SPECIAL CASES

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A student may have both special and unusual circumstances. Financial aid administrators may exercise their professional judgment and make adjustments that are appropriate to each student's situation with adequate documentation.

740.3 – PROVISIONAL INDEPENDENT *STUDENT* STATUS

Students can indicate in the online FAFSA that they believe they have unusual circumstances that prevent them from providing parental data. Those who indicate this are thoroughly informed about what warrants a dependency override and what the results will be for their application. If the student persists through the application screens and does not include parental data, they will get a rejected output document, which the school must review. The financial aid administrator will determine if the student must provide parental data, merits a dependency override, or is unaccompanied and homeless.

740.3.1 – UNACCOMPANIED HOMELESS YOUTH

A student who is determined to be an unaccompanied or at-risk homeless youth may be considered independent for purposes of the FAFSA. A dependency override for unusual circumstances is considered unique from a determination for homeless youth. Homeless youth determinations are made on a case-by-case basis but are not subject to professional judgment adjustments and processes as outlined in this policy. Homeless youth determinations are addressed separately. Financial aid administrators will evaluate documentation to determine unaccompanied homeless youth eligibility by following specific direction outlined by the Department of Education. *For more information, see Policy 741 Provisional Independent Student Status, Homeless Youth Determination.*

740.4 – PROCESSES AND PARAMETERS FOR SUBMITTING AND REVIEWING REQUESTS

The Financial Aid Office provides parties interested in submitting a request for professional judgment an informational document which includes a Professional Judgment Request Form the student must complete. The college maintains a reasonable approach and timeline for reviewing all professional judgment requests on a case-by-case basis.

Institutions may put parameters and limits on special circumstance and unusual circumstance considerations, so long as those limits do not result in denial of all special circumstance and/or unusual circumstance adjustments, or those in one category or area.

740.4.1 – Students submitting a request for professional judgment must have been admitted to the college and submitted a Free Application for Federal Student Aid (FAFSA) relative to the award year of the professional judgment request.

740.4.2 – Students who have already accepted a financial aid (Pell Grant) offer at the college may not submit a request for professional judgment for the award year of the accepted offer.

740.4.3 – A student is limited to submitting only one professional judgment request throughout their enrollment at the college.

740.4.4 – A professional judgment request for a student with a zero or negative EFC/SAI, will not be considered.

740.4.5 – All requests are time-sensitive and subject to federal deadlines. Incomplete or missing documentation may delay the process and result in deadlines being missed and requests being denied.

740.4.6 – Students waiting for a determination to approve or deny a professional judgment request should be fully prepared to assume responsibility for any payments due to the college.

740.5 – VERIFICATION AND A REQUEST FOR PROFESSIONAL JUDGMENT

A student who is selected by the school or the Department of Education for verification must complete verification before a professional judgment request may be considered. This is to ensure that any adjustment is made on correct information. There is

NUMBER: 740

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an exception; financial aid administrators are not required to verify information that will be removed as the result of a professional judgment decision. Selection for verification may occur at any time during the professional judgment consideration process. See policy 735 Verification and Updating of Student Aid Application Information for more information about what may be required to complete the verification process.

740.6 – ADEQUATE DOCUMENTATION TO SUPPORT REQUEST

Adequate documentation for adjustments substantiates the special circumstances or unusual circumstances of an individual student – not conditions that exist for a whole class of students. Adequate documentation may include, but is not limited to, a documented interview or phone call between the student and the financial aid administrator, written statements, supplementary information, and/or other documented information as described in 20 USC 1087TT.

The student is responsible for providing documentation to fully support the circumstances of their request. Students may be required to provide additional documentation as requested by the financial aid administrator. The college will ensure that any supporting documentation provided by the student is adequate to substantiate the students' circumstances; however, excessive documentation will not be accepted or considered.

All request forms and documentation collected must be maintained in the student file. Sufficient notes should be made so that another aid administrator reviewing the student's case could easily ascertain the reason any changes were made as well as their effect. Information describing the student's unique circumstances, sources of information substantiating the circumstances, clear record of the decision made and how it was reached, name of the financial aid administrator making the adjustment, and date should be recorded.

740.7 – INCOME PROTECTION ALLOWANCE

Analysis of a student's need recognizes that part of a family's resources must be devoted to modest living expenses such as taxes, basic living costs, and other unavoidable expenses. Other expenditures that are a matter of choice are usually not included as allowances against available income.

An income protection allowance (IPA) is included in the EFC/SAI calculation to account for modest living expenses. This portion of the family income is subtracted from the AGI to acknowledge that not all family income can be used toward education expenses. An expense already covered by the IPA cannot be considered for an adjustment. It is reasonable to assume that approximately 30% of the IPA is for food, 22% for housing, 9% for transportation expenses, 16% for clothing and personal care, 11% for medical care, and 12% for other family consumption.

The IPA for a particular student is provided as one of the intermediate values in the FAA Information section of the FAFSA output document (labeled as "IPA").

740.8 – FINAL DETERMINATION TO APPROVE OR DENY A REQUEST – DOCUMENTATION AND NOTICE

Reasons for a financial aid administrator's decision to approve or deny a request for professional judgment and any subsequent adjustments must be documented and maintained in the student file. All decisions must be reasonable and fully documented.

The college must provide the student with a final determination in writing as soon as practicable after reviewing all requested documentation. This final determination must also be maintained in the student file.

Institutions must act on a request for a determination of independence within 60 days of a student making such a request and providing adequate documentation.

NUMBER: 740

SUBJECT: PROFESSIONAL JUDGMENT

APPROVAL DATE OF LAST REVISION: MARCH 6, 2023

SOURCE(S): FAFSA SIMPLIFICATION ACT; 20 USC 1087TT, TITLE 20, CHAPTER 28, PART F; FSA HANDBOOK, APPLICATION AND VERIFICATION GUIDE, CHAPTER 5, SPECIAL CASES

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740.9 – MAKING THE PROFESSIONAL JUDGMENT ADJUSTMENT

Professional judgment adjustments must be made by the financial aid administrator electronically with the Department of Education using their online or approved software.

A special circumstances adjustment is made on the student's ISIR record to be adjusted by selecting "EFC/SAI adjustment requested" in the professional judgment field and by adjusting other fields as appropriate to the professional judgment decision. The next ISIR the college receives will indicate "Professional judgment processed."

An unusual circumstance, or dependency override, may be made on the student's initial application through the Department of Education's online access using the Dependency Override code of "1." If the student has already applied, the Department's online access may be used to authorize or cancel an override. Only the school can perform an override and only the school performing the override will receive that transaction.

A school is not permitted to make a professional judgment adjustment for a student after that student has ceased to be eligible, including when a student is no longer enrolled.

740.10 – LIMITATIONS ON AUTHORITY, APPEALS, AND TRANSFERABILITY

Effective with the 2023-2024 award year, although a financial aid administrator may use their discretion to deny a student's request for adjustment, the Higher Education Act prohibits institutions from having a policy that denies all professional judgment requests for adjustments. Schools must make their professional judgment policy publicly available to inform students of their ability to request such adjustments. The college meets this requirement by posting this policy on the college's website. The Financial Aid Office reserves the right to review circumstances and follow authoritative guidance that may or may not be outlined in this policy to make or not make adjustments.

The Higher Education Act prohibits the Department of Education from regulating professional judgment. A financial aid administrators' decision regarding adjustments is final and cannot be appealed to the college or the Department of Education.

Professional judgment adjustments made at BTECH may or may not be valid at another school should the student choose to transfer from the college. The Financial Aid Office at BTECH does not accept professional judgment adjustments for special circumstances approved at other colleges.

NUMBER: 741 **NEW!**

SUBJECT: PROVISIONAL INDEPENDENT STUDENT STATUS, HOMELESS YOUTH DETERMINATION

APPROVAL DATE OF LAST REVISION:

SOURCE(S): HIGHER EDUCATION ACT (HEA), AS AMENDED; FAFSA SIMPLIFICATION ACT; DCL GEN-22-15 AND GEN-23-06;
NASFAA ASKREGS ARTICLE 35313; APPLICATION AND VERIFICATION GUIDE OF THE FSA HANDBOOK, CHAPTER 2 AND CHAPTER 5

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741.1 – PROVISIONAL INDEPENDENT STUDENT STATUS

The FAFSA Simplification Act permits dependent students to complete the FAFSA as a “provisional” independent student if they believe they may qualify for independent status due to limited unusual situations. Beginning with the 2023-24 award year, dependent students who do not provide parental data on the FAFSA will be granted provisional independent student status.

The Financial Aid Office at the college must reach out to all dependent students with a provisional independent student status and inform them about the procedures for requesting a dependency override using professional judgment in accordance with the colleges required procedures. The college will review submitted requests to determine if the student must provide parental data on their FAFSA, merits a dependency override, or should be classified as an unaccompanied homeless youth.

741.2 – PARENTAL DATA REQUIRED

A student whose documentation does not warrant a dependency override or does not result in a homeless youth determination, must report parental data on their FAFSA in order for their eligibility for federal student financial aid to be considered.

741.3 – DEPENDENCY OVERRIDE

College policies and procedures for requesting a professional judgment adjustment are outlined in Policy 740 *Professional Judgment*. Upon receiving the ISIR for a student with a provisional independent student status who has been accepted at the college, the Financial Aid Office must:

- Within two weeks of receiving the students ISIR indicating the student's provisional independent student status, notify the student of the college's process, requirements, and timeline for a professional judgment adjustment that will result in the review of the student's request for a dependency override;
- Provide the student with a final determination of the student's dependency status and Title IV aid offer as soon as practicable after all requested documentation is provided;
- Retain all documents related to the dependency override, including documented interviews, for at least three years after the student's last enrollment, and shall abide by all other Title IV recordkeeping requirements; and
- Presume that any student who has obtained a dependency override for any preceding award year at the college to be independent for each subsequent award year at the college unless the student informs the college that circumstances have changed, or the college has specific conflicting information about the student's independence.

If the dependency override is approved, the college is required to carry that decision forward to future award years without collecting documentation unless the student reaches out to the college and indicates their circumstances have changed.

A dependency override for unusual circumstances is considered unique from a determination for homeless youth as outlined below. For more information about processing a dependency override by using professional judgment, see Policy 740 *Professional Judgment*.

741.4 – HOMELESS YOUTH DETERMINATION

A student who is determined to be an unaccompanied homeless youth or an unaccompanied and self-supporting youth at-risk of homelessness may be considered independent for purposes of the FAFSA. Homeless youth determinations are made on a case-by-case basis but are not subject to professional judgment processes and adjustments as described above. Homeless youth determinations are addressed separately. Policy 740 briefly addresses homeless youth determinations and directs students to this policy for the further guidance found here.

Financial aid administrators at the college will evaluate submitted documentation to determine homeless youth eligibility by following specific directions outlined by the Department of Education. To be considered an unaccompanied homeless youth on

NUMBER: 741 **NEW!**

SUBJECT: PROVISIONAL INDEPENDENT STUDENT STATUS, HOMELESS YOUTH DETERMINATION

APPROVAL DATE OF LAST REVISION:

SOURCE(S): HIGHER EDUCATION ACT (HEA), AS AMENDED; FAFSA SIMPLIFICATION ACT; DCL GEN-22-15 AND GEN-23-06;
NASFAA ASKREGS ARTICLE 35313; APPLICATION AND VERIFICATION GUIDE OF THE FSA HANDBOOK, CHAPTER 2 AND CHAPTER 5

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the FAFSA, an individual must be a youth who is (1) unaccompanied **and** homeless **or** (2) unaccompanied, self-supporting, **and** at risk of being homeless.

A student is considered –

741.4.1 – UNACCOMPANIED when the student is not living in the physical custody of a parent or guardian.

741.4.2 – HOMELESS if they are lacking fixed, regular, and adequate housing.

741.4.2.1 – FIXED – stationary, permanent, and not subject to change

741.4.2.2 – REGULAR -- used on a predictable, routine, or consistent basis

741.4.2.3 – ADEQUATE -- sufficient for meeting both the physical and psychological needs typically met in the home

741.4.3 – AT RISK OF BEING HOMELESS when the student's housing may cease to be fixed, regular, and adequate, for example, a student who is being evicted or has been asked to leave their current residence and has been unable to find fixed, regular, and adequate housing.

741.4.4 – SELF-SUPPORTING when the student pays for their own living expenses, which includes paying for fixed, regular, and adequate housing.

Regardless of their age, applicants who are unaccompanied and homeless, or are unaccompanied, self-supporting and at risk of being homeless, qualify for a homeless youth determination and will be considered independent on the FAFSA form.

741.5 – HOMELESS YOUTH DETERMINATION WITH DOCUMENTATION FROM AN ELIGIBLE AUTHORITY

Financial aid administrators at the college are required to consider a student to be independent if the applicant's status as an (1) unaccompanied and homeless youth or (2) unaccompanied and self-supporting youth at risk of homelessness is verified by one of the following authorities through a documented phone call, written statement, or a verifiable electronic data match:

- A local educational agency homeless liaison, as designated by the *McKinney-Vento Homeless Assistance Act* (42 U.S.C. 11432(g)(1)(J)(ii)), or a designee of the liaison;
- The director or designee of an emergency or transitional shelter, street outreach program, homeless youth drop-in center, or other program serving individuals who are experiencing homelessness;
- The director or designee of a program funded under subtitle B of title IV of McKinney-Vento (relating to emergency shelter grants) (42 U.S.C. 11371 et seq.);
- The director or designee of a Federal TRIO program or a Gaining Early Awareness and Readiness for Undergraduate program (GEAR UP) grant; or
- A financial aid administrator (FAA) at another institution who documented the student's circumstance in the same or a prior award year.

Documentation from one of the above authorities is sufficient for establishing a student's unaccompanied homeless youth status. If the student has received a documented determination from one of these authorities, the college must not request additional documentation, proof, or statements, unless it has conflicting information about the student's status.

741.6 – HOMELESS YOUTH DETERMINATION IN THE ABSENCE OF AN ELIGIBLE AUTHORITY

As provided in section 479D(a)(2) of the HEA, as amended, if a student indicates that they are an unaccompanied homeless youth or an unaccompanied and self-supporting youth at risk of homelessness, and the student is unable to provide documentation from at least one of the entities listed above, financial aid administrators at the college must review the student's

NUMBER: 741 **NEW!**

SUBJECT: PROVISIONAL INDEPENDENT STUDENT STATUS, HOMELESS YOUTH DETERMINATION

APPROVAL DATE OF LAST REVISION:

SOURCE(S): HIGHER EDUCATION ACT (HEA), AS AMENDED; FAFSA SIMPLIFICATION ACT; DCL GEN-22-15 AND GEN-23-06;
NASFAA ASKREGS ARTICLE 35313; APPLICATION AND VERIFICATION GUIDE OF THE FSA HANDBOOK, CHAPTER 2 AND CHAPTER 5PAGE 3 OF 3

circumstances and make the determination themselves. Financial aid administrators who are uncertain how to make the homeless determination, can contact the local homeless liaison in the school district or one of the other authorities listed above to discuss the McKinney-Vento definition and how it applies, but they must still make the determination. To contact the state coordinator or to request contact information for the local liaison, the financial aid administrator should visit <https://nche.ed.gov/data/>.

741.6.1 – APPLICANT UNABLE TO ANSWER OR UNCERTAIN OF ANSWER TO FAFSA HOMELESSNESS QUESTION

If an applicant believes they are an unaccompanied homeless youth or unaccompanied and self-supporting youth at risk of homelessness, but are unable to answer or are uncertain of their answer to the homelessness question on the FAFSA form, the applicant should contact the Financial Aid Office at the college to request that a financial aid administrator make a homeless youth determination.

In these situations, financial aid administrators must make a case-by-case decision that is:

- Based upon a written statement form, or a documented interview with the student that confirms that they are an unaccompanied homeless youth or unaccompanied homeless youth at risk of homelessness and self-supporting, and
- Made without regard to the reasons that the student is unaccompanied and/or homeless.

Financial aid administrators should keep in mind that a student may be considered homeless if they had to flee an abusive or threatening home environment, or had other unusual circumstances, that resulted in them not having a safe, stable place to live. Even if the parent(s) in such situations would otherwise provide housing, the student may still meet the definition for unaccompanied, self-supporting, and at-risk of becoming homeless.

741.7 – MAKING AND CARRYING FORWARD HOMELESS YOUTH DETERMINATIONS

The college shall review the eligible authority's documentation or make their own determination that the student was an unaccompanied homeless youth, or at risk of being homeless, at any time on or after July 1, of the FAFSA base year (e.g., July 1, 2023, for the 2024-2025 FAFSA form).

Starting with the 2023-24 Award Year, the college must review all requests for homeless youth determinations as quickly as possible, and as early as the year before the applicable award year, but no later than 60 days of a student making such a request. A student who does not provide requested documentation within the 60-day timeframe may be denied.

If the student is determined to be independent due to their unaccompanied homeless youth status, the college shall presume the student to be independent for each subsequent award year at the college, unless the college has conflicting information about the student's status or the student informs the college that their circumstances have changed.

741.7.1 – FLAGGING THE FAFSA

The financial aid administrator at the college must submit a FAFSA correction using the Homeless Youth Determination flag for any applicant that the college determines is an unaccompanied youth who is homeless or at risk of being homeless.

741.7.2 – RETAINING DOCUMENTATION

The college shall retain all documents related to unaccompanied homeless youth determinations for at least three years after the end of the award year which the student last attended.

NUMBER: 770 **NEW!**

SUBJECT: COST OF ATTENDANCE

APPROVAL DATE OF LAST REVISION:

SOURCE(S): DCL GEN-22-15, PUBLISHED NOVEMBER 4, 2022; FAFSA SIMPLIFICATION ACT, JOINTLY WITH CONSOLIDATED APPROPRIATIONS ACT, 2022, AS AMENDED; HIGHER EDUCATION ACT, SECTION 472, AS AMENDED; 2023-2024 FSA HANDBOOK, VOLUME 3, CHAPTER 2, COST OF ATTENDANCE (BUDGET); 20 USC 1087LL

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770.1 – COST OF ATTENDANCE - LEGAL AND REASONABLE SPECIFICATIONS

Cost of attendance is an estimate of a student's educational expenses for a period of enrollment. It is based on average expenses for students with the same enrollment status in the same program rather than an individual student's actual expenses. Federal Student Aid (FSA) program offers (such as the Pell Grant) are based on a student's financial need, beginning with cost of attendance. Law specifies the types of costs included in the cost of attendance; however, schools must determine appropriate and reasonable amounts to include for each category.

Previously, the Department of Education was not permitted to establish regulations on cost of attendance. Under the 2022 regulations, cost of attendance, except for tuition and fees, may be regulated to provide clarity in this area.

770.2 – CATEGORIES OF THE COST OF ATTENDANCE

A student's cost of attendance is the sum of the following categories defined by law. If a cost is not mentioned in these elements, it is not included in the cost of attendance.

770.2.1 – TUITION AND FEES - An amount normally assessed for a student carrying the same academic workload, as determined by the institution.

770.2.2 – BOOKS, COURSE MATERIALS, SUPPLIES, AND EQUIPMENT - An allowance for books, course materials, and equipment, which must include all such costs required of all students in the same course of study, including a reasonable allowance for the rental or upfront purchase of a personal computer, as determined by the institution.

770.2.3 – TRANSPORTATION - An allowance, as determined by the institution, may include transportation between campus, residence, and place of work.

770.2.4 – MISCELLANEOUS PERSONAL EXPENSES - An allowance, as determined by the institution, for a student attending the institution on at least a half-time basis.

770.2.5 – LIVING EXPENSES - An allowance for food and housing costs, as determined by the institution, to be incurred by the student attending the institution on at least a half-time basis, which includes the following:

- A standard food allowance that provides the equivalent of three meals each day.
- Housing allowances must include rent or other housing costs.
- A reasonable standard allowance for living expenses that is not zero for dependent students living at home with parents.
- For students living in housing on a military base or for which they receive a basic allowance, institutions must include a reasonable allowance for food, but cannot include housing costs.
- For all other students a reasonable allowance based on expenses incurred by such students.

770.2.6 – DEPENDENT CARE - An allowance based on the estimated actual expenses incurred for dependent care, based on the number and age of such dependents.

- Such allowance must not exceed the reasonable cost in the community in which such student resides for the kind of care provided; and
- The period for which dependent care is required includes, but is not limited to, class-time, study-time, field work, internships, and commuting time.

NUMBER: 770 **NEW!**

SUBJECT: COST OF ATTENDANCE

APPROVAL DATE OF LAST REVISION:

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PAGE 2 OF 3

770.2.7 – DISABILITY-RELATED EXPENSES – An allowance, as determined by the institution, for expenses associated with a student's disability, including special services, personal assistance, transportation, equipment, and supplies that are reasonably incurred and not provided for by other agencies.

770.2.8 – PROFESSIONAL LICENSURE, CERTIFICATION, OR A FIRST PROFESSIONAL CREDENTIAL – An allowance for the costs associated with obtaining a license, certification, or a first professional credential, for a student in a program that prepares them to enter a profession that requires such a qualification.

770.2.9 – SPECIAL POPULATIONS

770.2.9.1 – STUDENTS ENROLLED LESS THAN HALF-TIME – Cost of attendance must include any components (tuition and fees; books, course materials, supplies, and equipment; and transportation) normally applied to students who are enrolled less than half-time, along with any other components (disability expenses, etc.) that are not expressly prohibited for less than half-time students (e.g., miscellaneous personal expenses).

Cost of attendance may also include an allowance for living expenses, including food and housing costs, for up to three semesters, or the equivalent, with no more than two semesters being consecutive.

770.2.9.2 – DISTANCE EDUCATION – For students receiving all or part of their instruction by this means, no distinction may be made with respect to the mode of instruction in determining costs.

770.2.10 – NON-APPLICABLE CATEGORIES – The following are defined cost of attendance categories that are not applicable to the college. These costs are, therefore, not included in the college's cost of attendance.

- **STUDY ABROAD EXPENSES** – An allowance for reasonable costs, as determined by the college, for a student in a study abroad program approved for credit by the home institution.
- **FEDERAL STUDENT LOAN FEES** – An allowance for the cost of any Federal student loan fee, origination fee, or insurance premium charged to the student or student's parent.
- **COOPERATIVE EDUCATION COSTS** – An allowance for reasonable costs, as determined by the institution, associated with such employment for a student engaged in a work experience under a cooperative education program.
- **SPECIAL POPULATIONS – CONFINED OR INCARCERATED STUDENTS** – Cost of attendance may include tuition and fees, books, course materials, supplies, and equipment, the cost of obtaining a license, and/or certification of a first professional credential.
- **SPECIAL POPULATIONS – CORRESPONDENCE PROGRAMS** – Cost of attendance must include tuition and fees, if required, books, course materials, supplies, and equipment. An allowance for travel, housing, and food costs may be included if costs are incurred specifically for a period of residential training.

770.3 – DETERMINING COSTS (BUDGET)

The cost of attendance budget is an estimate of a student's expected educational expenses. Costs associated with the categories described above are pro-rated to costs for a full-time student for a full academic year. Each cost element is evaluated by the Financial Aid Office every year by following these general procedures and is recorded/maintained under separate cover.

Tuition is based on a per-credit rate. For purposes of the cost of attendance, tuition will be calculated assuming full-time

NUMBER: 770 **NEW!**

SUBJECT: COST OF ATTENDANCE

APPROVAL DATE OF LAST REVISION:

SOURCE(S): DCL GEN-22-15, PUBLISHED NOVEMBER 4, 2022; FAFSA SIMPLIFICATION ACT, JOINTLY WITH CONSOLIDATED APPROPRIATIONS ACT, 2022, AS AMENDED; HIGHER EDUCATION ACT, SECTION 472, AS AMENDED; 2023-2024 FSA HANDBOOK, VOLUME 3, CHAPTER 2, COST OF ATTENDANCE (BUDGET); 20 USC 1087LL

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enrollment for a full academic year. Fee costs will vary by course and by program. The Financial Aid Office will work with registration every year to obtain projected tuition and fee costs for each upcoming year.

Each department works with the college bookstore to maintain a current list of books, course materials, supplies, and equipment required to complete each program successfully. The Financial Aid Office obtains the list each year from the bookstore manager when preparing the cost of attendance budget.

Any cost associated with obtaining a license or certification may be included for students enrolled in programs that prepare them to enter a profession that requires such a qualification. These costs are provided by each department that has these costs.

Other elements of the cost of attendance are calculated using a baseline amount determined from surveys periodically conducted by the Financial Aid Office and completed by students of the college. The Financial Aid Office may rely on the U.S. Bureau of Labor Statistics Consumer Price Index year-ending rates to adjust costs yearly for any year that a survey is not done.

770.3.1 – DATA-DRIVEN COMPONENTS

An institution's estimates of cost of attendance components must be data-driven. Methodology will be documented by the Financial Aid Office on an annual basis when creating the budget for each new year. The Financial Aid Office will maintain documentation that supports the amounts allocated to all budget components and explain detailed breakdowns of each item included. The process used to develop program costs, and when adjustments are made on a case-by-case basis, will be documented.

770.4 – WEBSITE DISCLOSURE REQUIREMENTS

Statutory requirements have been enacted to ensure transparency and clarity when it comes to costs beyond tuition and fees. Each institution participating in FSA programs must make publicly available on their website a list of the cost of attendance elements and on any webpage discussing tuition and fees.

The college publishes this as a disclosure item on the consumer information web page. Each reference to tuition and fees in the narrative on the college's website is linked to that disclosure via the student guide. Whenever tuition and fee dollar amounts are listed for an academic program on the website, all of the remaining cost component dollar figures must also be listed on that same web page.

INSTITUTION: Bridgerland Technical College

DATE: 6/30/2023

SUBMITTED BY: Wendy Finley

USHE - REPORT OF CASH, CASH EQUIVALENTS, AND INVESTMENTS

ALL FUNDS - AS OF June 30, 2023

CATEGORY OF ASSET	DESCRIPTION OF ASSET	NAME OF BANK OR ISSUER	ACQUISITION DATE	MATURITY DATE	TOTAL FAIR VALUE	ENDOWMENT FUNDS AMT	FOUNDATION FUNDS AMT	ALL OTHER FUNDS AMT
Cash Per Books	Cash Per Books	N/A	N/A	N/A	5,300 5,300	- -	- -	- -
Savings Accounts	Savings	Zions	00/00/00	00/00/00	-	-	-	-
	Checking	Wells Fargo	00/00/00	00/00/00	(316,365)	-	-	-
	Checking FA	Wells Fargo	00/00/00	00/00/00	5,547 (310,818)	- -	- -	- -
Utah PTIF Accounts	Savings	UPTIF	00/00/00	00/00/00	10,324,909 10,324,909	- -	- -	- -
TOTAL FAIR VALUE					10,019,391	-	-	-

To the best of my knowledge, Bridgerland Technical College investments are in compliance with the State Money Management Act, the rules of the State Money Management Council, and the Regents Policy R541 Management and Reporting of Institutions Investments

Wendy Finley 8/9/2023
Wendy Finley, Budget Director Date