

**MONTANA BOARD OF REGENTS OF HIGHER EDUCATION**  
**Policy and Procedures Manual**

SUBJECT: GOVERNANCE AND ORGANIZATION

Policy 205.4 – Campus Hospitality (new) (existing) (removed)

**Effective: November 18, 1999; Issued: December 10, 1999; Revised: January 6, 2022**

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**I. Board policy:**

A. Expenses for official hospitality, community relations, or public relations may be reimbursed by a campus only when such activities are directly related to the objectives of the campus.

**II. Procedures:**

A. As a guide to making a determination as to when hospitality expenses will be reimbursable, those authorized to approve hospitality must:

1. determine that the activity is directly related to an objective of the campus; and
2. evaluate the importance of the event in terms of the costs that will be incurred, benefits that are anticipated from the expenditure, the availability of funds, and alternatives that would be equally effective in accomplishing the desired objective.

B. Hospitality expenses which exceed an aggregate of \$~~100~~50.00 must be approved prior to the event as provided in section D.

C. Occasions for which the expenses of official hospitality may be approved are limited to the following:

1. when the campus is host or sponsor of a meeting of a learned or professional society or organization, the cost of meals or light refreshments may be defrayed by the unit;
2. when the campus hosts official guests or prospective appointees for positions requiring specialized training or experience of a professional, technical, or administrative nature, the cost of meals or light refreshments may be defrayed by the campus;
3. when meetings of an administrative nature are held which are directly concerned with the welfare of the campus, the cost of meals or light refreshments may be defrayed by the unit. Where meals are involved, they must be a necessary and integral part of the business meeting;
4. when meetings between students and faculty or administrators are held, the cost of meals or light refreshments may be defrayed;
5. receptions for special ceremonies may be approved by the president, chancellor, appropriate vice president or director of student services; and
6. expenses relating to recruitment of prospective students are not considered hospitality and are not included in this policy. These expenses are part of a campus's normal function and as such may be approved by the appropriate department chair, director or dean.

D. The president or chancellor and such persons as he/she may designate have authority to approve expenditures for official hospitality.

1. Amount authorized:

- (a) (1) maximum per person expenditure for the person(s) being entertained and for the campus employee(s) as the official host or participating at the request of the official host shall not exceed the amount set out in the hospitality approval form;
- (b)(2) for catered events, delivery and set-up charges must be included when determining the authorized amount;
- (c) if the hospitality is to benefit persons from outside the campus, the department may pay for the meal expenses of its guest and normally that of one official host from the department and other department members whose attendance is authorized by designated campus officials in accordance with the schedule listed in D1 above;
- (d) a campus employee who is in travel status and eligible for meal allowances shall deduct the equivalent allowance for meal(s) received under this policy from the travel allowance

History:

Item 12-006-R0676, June 7, 1976, as revised April 26, 1990, December 11, 1992, and November 18, 1999 (Item 104-103-R0999).  
Revised January 6, 2022, Item 198-104-R0122.

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- claimed for that day;
- (e) exceptions to paragraphs D1(a), (b) and (c) must be approved by the president or chancellor in accordance with current reporting procedures.
- 2. Source of funds: Expenses for official hospitality may be defrayed from various campus fund sources, within the existing level of supplies and expense funds, and are subject to the above rules and the following additional limitations:
  - (a) agency funds are subject to any additional agency restrictions on the use of funds;
  - (b) contract and grant funds may be expended only if specifically authorized in the contract or grant, and only to the extent and for the purpose(s) authorized by the contract or grant;
  - (c) prior administrative approval for expenditures in excess of \$~~100~~50.00 is required even if hospitality expenses are authorized in the contract or grant;
  - (d) terms of a contract, grant or agency policy cannot authorize an expenditure which is not in accordance with board policy.
- 3. Reimbursement for expenditures: Official hospitality charges may be processed as a direct charge to an appropriate account by memorandum supported by receipts and official hospitality approval.
  - (a) There must be supporting data for all hospitality, including home hospitality.
  - (b) After approval the hospitality form should be returned to the originating department. The department is to attach the approval to the memorandum requesting reimbursement and forward both the form and the memorandum to the controller's office for payment.
  - (c) The controller's office or business office may not honor reimbursement requests not accompanied by the Approval of Hospitality Form when the amount requested exceeds \$~~100~~50.00.

E. Additional restrictions: Each campus may establish additional restrictions not in conflict with this policy on the reimbursement of hospitality expenses.

**II. Definitions:**

A. An official guest is a person, not otherwise employed or compensated by the campus, who is present on the campus to render a service on the campus, or at the invitation of the campus, or as a guest of the campus.

B. Light refreshments means a non-alcoholic beverage and/or pastries, vegetable trays, fruit plates, or items of a similar nature.

History:

Item 12-006-R0676, June 7, 1976, as revised April 26, 1990, December 11, 1992, and November 18, 1999 (Item 104-103-R0999).  
Revised January 6, 2022, Item 198-104-R0122.

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**III. Form:**

A suggested form to be used when requesting approval of official hospitality is attached.

History:

Item 12-006-R0676, June 7, 1976, as revised April 26, 1990, December 11, 1992, and November 18, 1999 (Item 104-103-R0999).  
Revised January 6, 2022, Item 198-104-R0122.

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**HOSPITALITY APPROVAL FORM**

(NAME OF CAMPUS)

(This format is suggested for use when submitting requests for approval of official hospitality.)

To: \_\_\_\_\_  
(DATE)

Permission is requested to use \_\_\_\_\_ funds for official  
(Department/office/acct.#)  
hospitality as follows:

Date: \_\_\_\_\_ For: \_\_\_\_\_ \$ \_\_\_\_\_  
(Refreshments/breakfast/lunch/dinner)

Name of guest(s) or function: \_\_\_\_\_  
\_\_\_\_\_

No. of Persons: \_\_\_\_\_ From: \_\_\_\_\_  
(Community, other campus, etc.)

Purpose of Entertaining: \_\_\_\_\_  
\_\_\_\_\_

Official Host: \_\_\_\_\_

Requested by: \_\_\_\_\_ Approved by: \_\_\_\_\_

Date: \_\_\_\_\_

**Note:** After approval return this form to requesting department.

History:

Item 12-006-R0676, June 7, 1976, as revised April 26, 1990, December 11, 1992, and November 18, 1999 (Item 104-103-R0999).  
Revised January 6, 2022, Item 198-104-R0122.

## MONTANA BOARD OF REGENTS OF HIGHER EDUCATION

### Policy and Procedures Manual

SUBJECT: ACADEMIC AFFAIRS

Policy 301 – Admission Requirements (new) (existing) (removed)

**Adopted: October 28, 1977; Revised: January 1, 2014; Revised: April 16, 2020; Revised: May 27, 2021; Revised: July 14, 2022.**

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#### I. General Admissions Standards

A. Students must have graduated from a high school accredited by a state accrediting agency or have a high school equivalency completion assessment designated by the Montana Board of Public Education to be admitted to any campus of the Montana University System (MUS). At the discretion of the institution, for students who complete their secondary education through home schooling or at unaccredited secondary schools, this requirement may be met by “satisfactory performance” on the ACT, SAT (Scholastic Aptitude Test), or a recognized testing instrument defined in the Federal Register as indicative of a student’s “ability to benefit.”

B. The two-year campuses and some two-year programs of the four-year campuses of the MUS are open admission, in which the only academic requirement is (A) above. However, individual programs of study within those institutions may have more selective admission requirements.

C. Students in credit-bearing continuing education courses must meet the same admission requirements and academic standards as students in regular academic courses.

D. The requirements in this section apply to admission to colleges and universities in the MUS. Specific academic programs (such as nursing or engineering) may have additional admission requirements, which can be found in the program catalogues and websites.

#### II. Full Admission to Four-Year University Programs

To be fully admitted as first-time, full-time undergraduates into a four-year university program (without conditions or provisions), students must meet the following requirements:

##### A. Completion of the Regents’ College Preparatory Program:

1. Four years of English: in each year the content of the courses should have an emphasis upon the development of written and oral communication skills and study of literature.
2. Three years of mathematics including Algebra I, geometry and Algebra II (or the sequential content equivalent of these courses). Students are encouraged to take a math course in their senior year.
3. Three years of social studies which shall include global studies (such as world history or world geography); American history; and government, economics, Indian history or other third year courses.
4. Two years of laboratory science: one year must be earth science, biology, chemistry, or physics; the other year can be one of those sciences or another approved college preparatory laboratory science.
5. Two years chosen from the following:
  - (a) foreign language (preferably two years);
  - (b) computer science;
  - (c) visual and performing arts; or
  - (d) career/technical education units which meet the office of public instruction guidelines.

##### B. Demonstration of Mathematics Proficiency:

1. A score of 22 or above on ACT mathematics; or
2. A score of 27.5 or above on SAT mathematics test; or
3. A score of 3 or above on the AP calculus AB or BC subject examination or a score of 4 on the IB calculus test; or

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4. A score of 50 or above on the CLEP subject examinations in selected topics [college algebra, college algebra-trigonometry, pre-calculus, calculus, or trigonometry]; or
  5. Completion of a rigorous high school core including four years of mathematics in high school (Algebra I, Algebra II, geometry & a course beyond Algebra II) and three years of laboratory science; or three years of mathematics including a course beyond Algebra II and four years of laboratory science, in addition to English, social studies, and electives as described in the regents' college preparatory program, with grades of C or better in all courses (See Appendix I.); or
  6. A cumulative high school grade point average (GPA) of 3.0 or higher; or
  7. A cumulative high school GPA of 2.5 or higher AND an Algebra II (or the sequential content equivalent) course grade of C or better.
- C. Demonstration of Writing Proficiency:
1. A score of 7 or above on the writing test or 18 or above on the ELA (weighted composite based on the English, reading, and writing scores) of the optional writing test of the ACT; or
  2. A score of 25 or above on the writing and language test of the SAT; or
  3. A score of 3 or above on the AP English language or English literature examination; or
  4. A score of 4 or above on the IB language A1 exam; or
  5. A score of 50 or above on the CLEP subject examinations in composition; or
  6. A cumulative high school GPA of 3.0 or higher; or
  7. A cumulative high school GPA of 2.5 or higher AND a course grade of C or better in an 11<sup>th</sup> grade English Course.
- D. General preparation as demonstrated through at least one of the following:
1. A composite score of at least 20 on the ACT or a score of at least 1050 on the total of mathematics, evidence-based reading, and writing scores on the SAT for admission to Montana State University-Northern; or
  2. A composite score of at least 22 on the ACT or a score of at least 1120 on the total of mathematics, evidence-based reading, and writing scores on the SAT for admission to Montana State University-Billings, Montana Technological University, Montana State University-Bozeman, The University of Montana-Missoula, and The University of Montana Western; or
  3. A high school GPA of at least 2.5; or
  4. A ranking in the upper half of the school's graduating class.
- E. Institutions are authorized to exempt the following classes of students from the requirements to demonstrate their math proficiency, writing proficiency and general preparation, as set out in Section II parts (B), (C), and (D).
1. Institutions may exempt up to 15% of first-time, full-time undergraduates to admit students with special talents, ~~minorities and others who demonstrate special~~ or needs; and
  2. Non-traditional students (those who do not enter college for a period of at least three years from the date of high school graduation or from the date when they would have graduated from high school); and
  3. Summer only students; and
  4. Part-time students taking seven or fewer college-level semester credits.
  5. Students who do not meet the Mathematics and Writing Proficiency requirements in Section II parts (B) and (C), provided the campus establishes procedures to: (i) provide these students access to additional math and writing support; (ii) advise them to enroll immediately in math and

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writing coursework; and (iii) encourage them to complete math and writing coursework in their first 30 credits.

Institutions must establish procedures for the admission of applicants who do not meet the minimum requirements set forth in Section II parts (B), (C), and (D). Such procedures shall include submission of evidence of the ability to do college-level work and shall be subject to approval of the deputy commissioner for academic, research, and student affairs.

### III. Transfer Admission

A. Transfer applicants must present at least a 2.0 cumulative grade point average (i.e., equivalent to a "C" on a 4.0 scale) based on transferable credits carried from all colleges or universities previously attended to be eligible for full admission to a four-year campus.

B. For purposes of admissions, a *transfer student* is a student who has earned 12 or more credits in college-level courses at another college or university after graduating high school or attaining a high school equivalency as described in Section I part (A), who is entering a new institution for the first time, and whose credits at the previous institution have been accepted by the receiving institution.

### IV. Dual Enrollment

A. In order to grant college credit, campuses may establish procedures for the admission of students enrolled simultaneously in high school and a campus of the MUS and for admission of non-high school graduates before their high school class has graduated. Such admission shall:

1. Be selective and shall be confined to students who present evidence of the ability and maturity to successfully complete the college course(s); and
2. Be based on providing educational opportunities that are not available in the high school setting; and
3. Require that the high school principal or counselor approve participation of a student in the college program; and
4. Be consistent with Operational Guidelines on Dual Enrollment, including test scores and prerequisites for courses with placement requirements.

### V. Student Responsibilities

A. Falsification or willful suppression by a student of any information called for on an application for admission may be grounds for cancellation *or denial* of admission.

B. Before enrolling for an initial term, all post-secondary students must comply with immunization requirements of ARM 37.114.701-721:

1. Students born in 1957 or later must provide evidence that they have received two measles and two rubella immunizations, with dose one administered at 12 months of age or later and dose two administered at least 28 days after dose one. No measles vaccination before 1967 is valid. No rubella vaccination before 1969 is valid. As an alternative, a student may supply a laboratory report from a CLIA approved laboratory indicating that the student is immune to measles and/or rubella.

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2. Under ARM 37.114.711, a student may be conditionally enrolled for an initial term if the student has not received the second dose of measles and/or rubella vaccine provided they receive the second dose at least 28 days after the first dose and before the beginning of the succeeding school term.
3. A student may be exempt from the above requirements for medical reasons (ARM 37.114.715) provided the student supplies a statement from a physician (MD or DO) holding a license to practice in the United States or Canada stating: (a) the specific immunization that is contraindicated; (b) the time period the immunization is contraindicated; and (c) the reasons for the contraindication
4. A student may be exempt from the above requirements for religious reasons provided the student supplies a notarized statement that immunizations are contrary to the student's religious beliefs. This notarized statement must be submitted annually by any student claiming a religious exemption (ARM 37.114.716).
5. Individual campuses or programs may have additional immunization/testing requirements.

#### VI. General Campus Procedures

A. Campuses may apply admission review processes that: (1) improve the likelihood of student success; (2) encourage rigorous college preparation among applicants; and (3) ensure balanced treatment of all student applications.

B. For applicants who exceed every criterion of undergraduate admissions standards, campuses may establish facilitated admissions procedures and may identify such students with special privileges, titles, or honors.

C. For applicants whose transcripts and exam scores leave some question about the prospective student's success, additional documentation (such as essays, letters of recommendation, and/or portfolios) may be required before granting admission.

D. Campuses will adhere to the non-discrimination policy contained in section 703 of the policy and procedures manual.

E. Campuses may establish a cut-off date for the submission of complete credentials for admission, and any applicant who does not submit a complete application by that date may be required to delay entrance until a subsequent semester.

F. Campuses may establish a category of special or non-degree student. This category will allow admission for the purpose of taking a limited number of credits without the complete documentation required in a regular application for admission.

G. Any campus may deny or condition admission, readmission, or continuing enrollment of any individual who, in the judgment of the campus, presents an unreasonable risk to the safety and welfare of the campus and persons thereon. In making such judgment, the campus may, among other things, take into account the individual's history and experience relative to: (1) violence and destructive tendencies; (2) behavior at other educational institutions; and (3) any rehabilitative therapy the individual may have undergone. A decision to utilize the authority conferred by this paragraph shall be communicated to the individual in writing. Each campus shall have a procedure by which such decisions may be appealed.

H. Campuses are authorized to control the number of out-of-state first-time and transfer students. In addition, campuses shall require applicants from non-English speaking countries to present evidence of



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proficiency in the use of the English language. Campuses may impose additional requirements on applicants from foreign countries.

I. The MUS will establish a uniform system for monitoring performance of all students based on admission criteria, including Proficiency Standards, ACT or SAT scores, high school GPA, age, high school rank and course of study to facilitate evaluation and analysis of the admissions requirements.

#### VII. Scholarships

A. To encourage a high level of academic preparation for students who wish to pursue higher education, the board of regents of higher education hereby adopts the following procedures:

1. Only students who have completed the rigorous high school core shall be eligible for regents' high school honor scholarships.
2. Other state-supported scholarships, fee waivers, or grants-in-aid are awarded on the basis of academic achievement. In unusual circumstances this provision may be waived for students who have been graduated from high school for more than three years.

B. In awarding scholarships based on academic achievement, special consideration should be given to students who have completed available academic core courses beyond those specified in the college preparatory program. Honors and advanced placement courses should be given extra weighting.

#### VIII. Definitions of Terms

A. For purposes of admissions, a *transfer student* is a student who has earned 12 or more credits in college-level courses at another college or university after graduating high school or attaining a high school equivalency as described in Section I part (A), who is entering a new institution for the first time, and whose credits at the previous institution have been accepted by the receiving institution.

B. *College-level work* means those courses that are applicable toward an associate of arts, associate of science or baccalaureate degree at their respective institution. Developmental (remedial) courses numbered below 100 are not considered college-level.

C. *Traditional students* are those who enter college within three years of high school graduation or within three years from the date when they would have graduated from high school.

D. *Full admission* status describes students who have met all the admissions standards and are not admitted under exemptions, exceptions, conditions, or provisions.

E. *Provisional admission* status is reserved for students who do not meet one or both of the proficiency standards (mathematics or writing). During this temporary provisional status, students must satisfactorily complete developmental coursework or additional tests to demonstrate the proficiency required for college-level work.

F. *Open admission* refers to a non-competitive college admission process in which the only academic criterion for entrance is a high school diploma or high school equivalency completion assessment designated by the Montana Board of Public Education.

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Policy 301 – Admission Requirements (new) (existing) (removed)

**Adopted: October 28, 1977; Revised: January 1, 2014; Revised: April 16, 2020; Revised: May 27, 2021; Revised: July 14, 2022.**

G. *Early admission* refers to the admission of a high-school aged student prior to his or her high school graduation. The student may earn college credit while enrolled high school.

H. *Non-degree admission* is for students who do not intend to pursue a degree program.

I. *Program* can be found in two contexts in higher education: (1) a degree/credential program, such as a certificate, associate, or baccalaureate degree program; or (2) an academic program, such as a nursing or engineering program. Admissions requirements apply to both types of programs.

J. *Ability to Benefit* exams are designated in the federal register as means for students who do not have US high school diplomas or recognized equivalents such as GEDs to demonstrate their ability to benefit from the training offered and be eligible to receive financial aid under any Title IV Higher Education Act program.

K. *Dual enrollment* is the broad term for various types of opportunities for high school students to take college coursework while they are enrolled in high school, either for dual credit or college-credit only. (*Operational Guidelines for Dual Enrollment*)

#### Appendix I

##### Regents' College Preparatory Program (301 II (A)) and Rigorous Core (301 II (B) 5)

Course	College Prep Program	Years	Rigorous Core	Years
Mathematics	Algebra I, II, and Geometry (or the sequential content equivalent, i.e., 3 levels of Integrated Math).	3	Algebra I, II, and Geometry (or the sequential content equivalent) and a course beyond Algebra II or Integrated Math III (such as Trigonometry, Pre-Calculus, Calculus, Computer Math, or course equivalent). <i>All with grades of C or better.</i>	4
English	Written and oral communication skills and literature	4	Written and oral communication skills, literature; Recommendation: a designated college-prep composition or research-writing course.	4
Science	Lab sciences: one year must be earth science, biology, chemistry or physics	2	Lab sciences: General, physical or earth science, biology, chemistry or physics	3
Social Studies	Global studies (world history, world geography), American history, and government. Economics, American Indian history or other third-year course	3	Global studies (world history, world geography), American history, and government. Economics, American Indian history or other third-year course. Recommendation: ½ yr of other courses (such as psychology, humanities)	3
Electives	World language, computer science, visual and performing arts, or career/technical education	2	Recommendation: 2 years of one world language; and music, fine arts, speech/debate, or career/technical education (such as computer science)	3

#### History

Board action April 1, 1929 (rescinded); Item 18-002-R1077, Admission Requirements: General Policies; Montana University System, October 28, 1977 as revised April 13, 1984, May 3, 1985, December 1986, December 16, 1988, September 14, 1989, March 22, 1990, April 26, 1990, November 20, 1997, and January 28, 1999; editorial changes made July 14, 2004; Item 148-104-R0910 clarification and consolidation, September 23, 2010. Item 162-101-R0114, revised to reflect the Montana Board of Public Education policy, January 1, 2014. Revised April 16, 2020 per Item 187-101-C0420. Revised May 21, 2021 via Item 194-110-R0521. Revised July 14, 2022 (Item 201-101-R0722).

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**MONTANA BOARD OF REGENTS OF HIGHER EDUCATION**  
Policy and Procedures Manual

SUBJECT: STUDENT AFFAIRS

Effective: November 18, 1999

Policy 502.1 – Dormitory residency requirements

**Adopted: September 8, 1975; Revised November 18, 1999**

([new](#)) (existing) (~~removed~~)

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Board policy:

The president or chancellor of each campus of the Montana University System is authorized to implement, at his discretion, a policy requiring all students who have not earned 30 semester credit hours to reside in campus dormitory facilities.

If such a policy is implemented, the president or chancellor shall establish an appropriate appeal mechanism to allow the granting of exceptions to the policy. [Institutions allowing exceptions must provide transparent and timely information about the appeal process to students.](#) The decision of any campus body established to hear dormitory residency appeals shall be final.

History:

Item 10-001-R0975, September 8, 1975; as revised November 18, 1999 (Item 104-103-R0999).

**MONTANA BOARD OF REGENTS OF HIGHER EDUCATION**  
**Policy and Procedures Manual**

SUBJECT: PERSONNEL

Policy 711.2 – Board of Regents Employment Contracts ([new](#)) (existing) (~~removed~~)

**Adopted: July 7, 1994; Revised: November 18, 2016; Revised: November 17, 2017**

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**Board Policy**

A. The following positions shall be hired through a Board of Regents (BOR) employment contract:

- ✓ Commissioner of Higher Education (BOR Policy 702.5 is controlling)
- ✓ President (BOR Policy 702.5 is controlling)
- ~~✓ Deputy Commissioner~~
- ✓ Chancellor
- ✓ Deans of independently accredited two-year colleges

B. BOR employment contracts:

1. Employees in positions referenced above shall be issued a BOR employment contract specifying salary and other terms of employment. BOR employment contracts are for a maximum of a one-year period and must be approved by the BOR. For the commissioner and presidents, the procedures for multiyear contracts and certain other conditions are governed by BOR Policy 702.5 (Appointment; Executive Contracts; Commissioner and Presidents). Initial contracts for the hiring of a new chancellor, or dean of an independently accredited two-year college may be for a term of up to two years, after which no subsequent contract term may exceed the one-year maximum.
2. For presidents and the commissioner, the notice provisions in BOR Policy 702.5 are controlling. For deputy commissioners, chancellors, and deans of independently accredited two-year colleges, the notice provisions are as follows. Except in cases of mid-contract termination for cause or loss of funding, full-time employees hired through a BOR employment contract shall be given written notice of intent not to renew their contracts at least thirty (30) days prior to expiration during the first year of employment; three (3) months prior to expiration during the second year of employment, or; five (5) months prior to expiration during the third or subsequent years of employment with the institution.
3. All other terms and conditions of employment shall be outlined in the contract.

C. Limitations: No agent of the BOR may make commitments or promises to any employee to extend employment beyond the maximum term authorized in this policy. Any such promises, whether written, oral or implied, are invalid and unenforceable.

D. Salary adjustments for executives working under BOR employment contracts are subject to guidelines approved by the board.

History:

Item 83-002-R0594, Criteria for Board of Regents Contracts; Non-faculty Personnel, approved July 7, 1994; Policy revised by Item 131-116-R0506, Employment contracts and pay guidelines for non-faculty administrators and professionals, approved by the Board of Regents June 1, 2006. Item 173-102-R1116, revised November 18, 2016. Item 177-103-R1117, revised November 17, 2017.

## MONTANA BOARD OF REGENTS OF HIGHER EDUCATION Policy and Procedures Manual

### SUBJECT: FINANCIAL AFFAIRS

Policy 910.1 - Budgeting; community colleges (new) (existing) (removed)

Adopted: November 18, 1999; Revised: January 6, 2022

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#### I. Board policy

Consistent with the intent of 20-15-309, MCA, and 20-15-312, MCA, the Board of Trustees of a community college district will submit necessary data and enrollment projections for biennial appropriation calculations and annual operating budgets to the Board of Regents for review and approval.

#### II. Procedures

1. Biennial Budget – by August 1 immediately proceeding each regular legislative session the community college district shall submit enrollment projections and other necessary data for calculating the state appropriations.
2. [Annual Operating Budget – by August 15 the community college district shall submit an operating budget to the Board of Regents.](#)
- 3.2. The community college district shall operate within the limits of the general fund operating budget approved by the Board of Regents and may request budget amendments for increased spending authority if necessary.

#### History:

Item 4-007-R0474, Policy Regarding Budgeting and Fiscal Matters, Montana Community Colleges, April 8, 1974, as revised April 21, 1980 and November 18, 1999 (Item **104-103-R0999**). Revised January 6, 2022, Item 198-101-R0122.

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**Policy and Procedures Manual**

**SUBJECT: FINANCIAL AFFAIRS**

Policy 940.13 – Tuition Waivers and Discounts (new) (existing) (removed)

**Adopted: October 28, 1977; Revised: May 24, 2013; Revised: July 13, 2018; Revised: September 12, 2019; Revised: November 22, 2019; Revised: November 19, 2021; Revised: July 11, 2023**

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I. Board Policy

A. The campuses of the Montana University System are authorized to waive tuition in accordance with this policy. The Commissioner of Higher Education is responsible for the general administration of this policy.

B. The objectives of this policy are to:

1. assure a uniform and equitable administration of tuition waiver policies for students at the campuses of the Montana University System,
2. increase accessibility to public higher education for citizens who would not be able to matriculate or to continue an educational program without financial assistance,
3. recognize meritorious achievement or service, whether academic or through exceptional accomplishment, by students in the Montana University System,
4. maintain fiscal responsibility by ensuring that other sources of financial assistance are explored and utilized prior to the waiver of tuition which reduces funds for the operation of the Montana University System, and
5. ensure that the allocation of waivers is made in accordance with federal law, specifically Title IX of the Higher Education Amendments of 1972.

C. Under this policy, only tuition will be waived. No fees, mandatory or miscellaneous, or program fees or other charges are waived by this policy.

D. Self-Supporting courses. Waivers awarded under this policy cannot be applied to self-supporting courses. Student with waivers under this policy will be required to pay the full tuition and fees for the self-supporting course.

E. Summer session. Any category of waiver granted to students during summer session shall be included in computations of each unit's allowable limit. Summer semester is considered the first semester of the fiscal year.

F. Board of Regents Designated Tuition Waivers. The Board of Regents hereby directs the campuses to grant waivers of undergraduate tuition for Montana resident students enrolled in the following categories at campuses of the Montana University System:

1. Montana University System Honor Scholarships. Recipients of a Montana University System Honor Scholarship are eligible for a tuition waiver.
2. 2 Plus 2 Honor Scholarships. Recipients of a 2 Plus 2 Honor Scholarship are eligible for a tuition waiver.
3. Honor Scholarship for National Merit Scholarship Semi-Finalists. National Merit Scholarship semi-finalists from Montana are eligible for a waiver through the first academic year (2 semesters) of enrollment exclusive of any credits earned prior to high school graduation. The holder of the scholarship must enter one of the Montana University System campuses or Dawson Community College, Flathead Valley Community College or Miles City Community College within nine months after high school graduation. A satisfactory standard of scholarship must be maintained as prescribed in § 9(b), "Continued Eligibility for Waiver." The scholarship is not transferable to another person and becomes void three years from the date of issue.
4. American Indian Waiver. Persons who ~~have one-fourth (1/4) American Indian blood or more or~~ are enrolled members ~~or tribally certified descendants of a state-recognized or~~ federally recognized Indian tribe which is located within the boundaries of the State of Montana are

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eligible for a waiver upon demonstration of financial need. "Financial need" is defined as having at least one dollar of remaining need after subtracting ~~Expected Family Contribution~~ [Student Aid Index](#), all Title IV grant aid and institutional aid from the cost of attendance. Duplication of tuition designated awards is not allowed.

5. **Faculty and Staff Tuition Waiver.** Tuition may be waived for permanent University System employees who are employed at least  $\frac{3}{4}$  time for the entire period of enrollment. Permanent employees employed at least  $\frac{3}{4}$  time for the entire academic year who are reemployed for the following academic year are eligible for a tuition waiver during the intervening summer term. Each campus may at its discretion also waive other fees, but in no case may registration and building fees be waived. Each campus may adopt regulations to limit the amount of credit an employee or staff member may register for and to control the times at which courses may be taken.
6. **Honorably Discharged Veteran Waiver.**
  - a. All honorably discharged persons who served with the United States forces and who are bona fide residents of the State of Montana for fee and tuition purposes are eligible for a waiver. This waiver shall not apply to persons who qualify for education stipends or other veterans' educational benefits under federal law or regulation and shall apply only to those who have at some time qualified for benefits but whose benefits have expired or been exhausted. Waivers for students who meet the criteria below will be applied as last dollar awards, up to the total annual cost of resident tuition only. Thus, individual tuition waiver amounts will vary, depending on the amount of federal grants and scholarships received by the student.
  - b. Honorably Discharged Veterans are eligible for a waiver if the following conditions are met:
    - 1) The veteran elected to become eligible for educational benefits under Title 38 or Title 10 of the United States Code (or a successor federal program granting educational benefits based on active duty in the regular armed forces of the United States) and has exhausted such benefits or is no longer eligible for such benefits because of the passage of time. Participants in the Veterans Educational Assistance Program (VEAP) or any similar contributory program who withdraw any portion of their contribution before the expiration date for their benefits are not eligible for the waiver.
    - 2) The veteran is a resident of Montana eligible for in-state tuition and fees under the policies of the board.
7. **War Orphans Waiver.** A waiver is available, with the approval of the Commissioner of Higher Education, for children aged 25 and under of members of the armed forces of the United States who served on active duty during World War II, the Korean, Vietnam, Iraq or Afghanistan conflicts. Such members of the armed forces must be Montana residents at the time of entry into service and must have been killed in action or died as a result of combat related injury, disease, or other disability while in the service.
8. **Surviving Dependents of Montana National Guard Member Waiver.** The surviving spouse or child of any Montana National Guard member killed as a result of injury, disease, or other disability incurred in the line of duty while serving on state active duty is eligible for a waiver. This waiver shall not apply to the extent that any such person is eligible for educational benefits from any governmental or private benefit program that provides comparable benefits.
9. **September 11, 2001 Victims Waiver.** Persons whose spouse, parent, or legal guardian was a victim of the September 11, 2001 terrorist actions at the New York World Trade Center, the Pentagon or the Pennsylvania airplane crash are eligible for the waiver. "Victim" as used herein means a person killed as a direct result of physical injuries suffered on or about September 11



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directly related to the above noted terrorist actions and includes rescuers, relief workers or fire and police personnel. It does not include any individual identified by federal law enforcement personnel as likely perpetrators of the terrorist activities. If a person is eligible for other grants or scholarships based on the individual's relationship to a victim, which assistance may be used for attendance within the Montana University System, the waiver shall be available only if the individual has fully pursued this alternative source of student assistance and only to the extent that the alternative aid does not cover charges otherwise waivable under this policy. This provision will automatically expire on May 30, 2010.

10. Surviving Dependents of Montana Firefighters/Peace Officers Waiver. The surviving spouse or child of any Montana firefighter or peace officer killed in the course and scope of employment is eligible for a waiver. This waiver shall not apply to the extent that any such person is eligible for educational benefits from any governmental or private benefit program that provides comparable benefits.
11. Montana National Guard Waiver. Beginning in Fall Semester 2020, a student who is a member of the Montana National Guard is eligible for a tuition waiver, provided the student:
  - a. Is a bona fide member of the Montana National Guard at the start of the semester for which the student is enrolling;
  - b. Has been certified as a Montana National Guard member in good standing by the Adjutant General;
  - c. Meets all admission requirements of the institution.

Waivers for students who meet the criteria above will be applied as last dollar awards, up to the total annual cost of resident tuition only. Thus, individual tuition waiver amounts will vary, depending on the amount of federal grants and scholarships received by the student.

Montana National Guard members who do not meet the residency requirements provided BOR Policy 940.1, but meet the criteria above, are eligible for the tuition waiver under this policy.

G. **Campus Discretionary Waivers and Discounts.** Campuses of the Montana University System may waive tuition, on a full or partial basis, for superior academic achievement, service to the campus, and/or other meritorious accomplishment or student financial need.

1. **Resident Student Waivers/Discounts.** Tuition may be waived/discounted for under-graduate or graduate resident students.
2. **Non-Resident Student Waivers/Discounts.** Tuition may be waived/discounted for non-resident students. The Montana University System must ensure that the average net tuition revenue per non-resident student (not including WUE students) exceeds the average net tuition revenue plus state appropriations per resident student. In other words, net educational revenues per student FTE must be greater for the non-resident student population than the resident student population.
3. **Yellow Ribbon.** Tuition may be waived for qualified veterans in accordance with an authorized Yellow Ribbon Program.

H. **Rules Applicable to all Waivers/Discounts.**

1. **Financial Need.** All waivers, except Honor Scholarships for National Merit Scholarship semi-finalists, MUS Honor Scholarships, 2 Plus 2 Honor Scholarships, and waivers for graduate teaching assistants and graduate research assistants shall include financial need as a criterion whenever possible.

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2. Continued eligibility for waiver. Students are eligible for continuation of a waiver, from year to year, unless otherwise limited, provided reasonable academic progress is maintained in accordance with the campus's satisfactory progress policy generally used in administering federal financial aid. This provision does not apply to senior citizens and faculty and staff waivers.
3. Waiver Amount Limit. No combination of waivers/discounts can exceed the total tuition charged by the campus.

**II. Procedures**

A. Authorizing official. The Financial Aid Director at each campus shall be the official authorized to award financial assistance, including tuition waivers and scholarships, to any student. No notice or authorization of financial assistance including tuition waivers and scholarships shall be communicated to a student except by authorization from the Financial Aid Director.

**B. Reporting and review:**

1. Each unit of the Montana University System will report annually to the Commissioner of Higher Education concerning waivers on forms provided.
2. The president or chancellor of each campus, with the assistance of the financial aid director, shall annually review financial aid practices to ensure that waivers are allocated in accordance with applicable policy.
3. The administration of this policy will be reviewed periodically by the Commissioner of Higher Education to ensure that no inequities, misinterpretations or misapplications have occurred and to assist in alleviating any problems.

**History:**

(Item 5-006-R0774), Policy Regarding Fee Waivers, Montana University System, as amended June 7, 1976 (Rescinded); (Item 18-005-R1077), October 28, 1977, as revised January 16, 1978, April 11, 1978, January 21, 1983, January 30, 1984, November 4, 1988, June 21, 1989, April 26, 1990, July 31, 1990, November 9, 1990, March 22, 1991, July 30, 1992, November 11, 1993, July 7, 1994, November 20, 1997, May 21, 1998, November 18, 1999 (Item 104-103-R0999), November 16, 2001 (Item 113-109-R1101), January 18, 2002 (Item 114-103-R0102), March 22, 2002 (Item 113-108-R1101), May 24, 2002 (Item 114-101-R0302), March 20, 2003 (Item 118-103-R0303) and as revised by the Task Force on Fees Report approved by the Board of Regents on March 24, 2000 with an effective date of Academic Year 2002. Item 135-114-R0507 approved by the Board of Regents on May 31, 2007, with an effective date of Fall Semester 2007. Item 156-104-R0912, Revised September 20, 2012. Item 159-105-R0513, revised May 24, 2013. Item 180-102-R0718, revised July 13, 2018. Item 184-101-R0919, Revised September 12, 2019. Item 185-103-R1119; revised November 22, 2019. Item 197-104-R1121, revised November 19, 2021. Revised July 11, 2023, Item 207-104-R0723.

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SUBJECT: FINANCIAL AFFAIRS

Policy 940.31 – Policy Statement on Tuition (new) (existing) (removed)

***Adopted: March 20, 2003, Revised November 19, 2010***

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## **I. Introduction**

Funding for higher education is a shared responsibility of the state, students, and campuses. The state assumes its share of that responsibility through state general fund appropriations and millage; students, through tuition and fees; and campuses, through management efficiencies by innovative and creative thinking and the generation of additional revenue. The Board of Regents of Higher Education plays a pivotal role in ensuring that the appropriate level of responsibility is assumed by the state, students, and campuses through a variety of ongoing activities, including the setting of tuition levels.

Tuition levels have a direct bearing on both student access and educational quality. A multitude of considerations go into establishing tuition levels. This policy statement is an attempt to identify and explain the most important of those considerations. The weight given any specific factor may vary depending on changing educational priorities, funding trends or economic conditions. For that reason this policy does not give a formula by which precise tuition levels will be determined. Rather, it attempts to identify the variety of factors that influence the setting of tuition. Some of the factors may even appear to contradict one another. One factor may point to higher tuition, another to lower. Nevertheless, both are listed here because it is important to show how final tuition levels are the product of a set of countervailing considerations. It is the intent of the policy to give campuses flexibility to set price within defined parameters that preserve the Board's accountability to Montana citizens for affordability and access.

Reservation of Rights - This policy is not intended to bestow any specific rights on any individual or group of individuals and the policy creates no enforceable expectation in any person to any specific or relative level of tuition.

## **II. The General Goals of Tuition Policy**

- A. Tuition should be set at a level that enables a campus to maintain high quality programs and services.
- B. Tuition levels should not be so high as to make postsecondary education unaffordable for Montanans of modest means.
- C. Access is a more important consideration at introductory levels of postsecondary education since this is the gateway to all subsequent achievement. Thus tuition will generally increase as educational level increases.
- D. Campuses will have the flexibility to differentiate tuition by program, sector and method of delivery to reflect the cost of providing education.
- E. As far as practicable, tuition levels should be predictable. This helps students and their families plan for college expenses. It also helps campus administrators develop plans and goals within a realistic time frame.
- F. Tuition levels should be competitive with other comparable public institutions.
- G. The issue of competitiveness is especially crucial in setting tuition levels for courses where access to the course is independent of a student's location (e.g., on-line courses).
- H. The proliferation of fees should be avoided, and the incorporation of mandatory general fees into tuition levels should be more commonplace.

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**III. Consideration of the Cost and Value of Education in Setting Tuition Levels**

A. Tuition levels will bear a relationship to the costs incurred by the campus in providing the education to the student. Tuition levels for resident students will bear a relation to the cost of education and the level of state support. ~~Campuses have the flexibility to set non-resident tuition at 150% of resident tuition and set non-resident tuition for graduate research and teaching assistants at 100% of resident tuition.~~

B. The economic benefits of higher education that accrue to the individual will be taken into account when tuition levels are established or when proposals for program- or institution-specific exceptions to tuition levels are considered. This factor will often complement the practice of scaling tuition to the cost of programs. The social, intellectual, cultural and economic benefits that accrue to society from having a well-educated citizenry and skilled workforce will also be considered when tuition levels are established.

C. A practical manifestation of these two factors is the tiering of tuition by level of institution and by the degree progression of students and the corresponding allocation of state appropriations to assure students affordable access to postsecondary education.

**IV. The Practice of Establishing Tuition**

A. As far as is practicable, the Board of Regents will establish tuition and fees for two-year intervals.

B. Campus recommendations to the board will flow from a campus governance process that includes campus hearings and opportunities for public and student input and will be presented in the context of the campus budget and strategic plan, taking into account the overall intended expenditures and their relationship to the priorities of the institution.

C. The Board will solicit recommendations on tuition levels from students and faculty and from campus and OCHE administrators as well as the public.

D. Campuses will have flexibility in the setting of tuition upon the demonstration to the board of special fiscal, infrastructure or market circumstances.

E. Incentives should be established to reward campuses that are successful in maintaining high quality programs with corresponding levels of tuition to assure access for qualified Montana students when tuition levels rise.

History:

Item 118-105-R0103, Policy Statement on Tuition, adopted by the Board of Regents March 20, 2003; revised Item 149-106-R1110, November 19, 2010.