**University of Massachusetts – Boston**

**Fee approval form AY 2021 – 2022**

This form is to be used to request new or increases/decreases/cancelations to existing:

* *Non-mandatory student fees.* **Non-mandatory student fees** – include optional or one-time fees or surcharges charged to students for specific services, or special academic program offerings and activities not required of the majority of students each year (**see Note 1 below for details**). Example: Laboratory fees.
* *Student Fees for Revenue Based Operations Charges.* **Student Fees for Revenue Based Operations Charges** – include charges for major auxiliary enterprise operations or major campus services (**see Note 2 below for details**). Example: Parking and Transportation.
* *Administrative Charges Including Sales and Services.* **Administrative Charges Including Sales and Services** – include charges for the sale or use of goods or services that are incidental to the conduct of instruction, research or public service or for administrative services (**see Note 3 below for details**). Example: fees for the use of scientific equipment or laboratories.

To be considered for the 2021-2022 academic year, fee requests must be submitted to the Budget Office **no later than February 19, 2021.**

**Materials should be saved electronically to** [**One Drive folder**](https://liveumb-my.sharepoint.com/%3Af%3A/r/personal/obfp_umb_edu/Documents/OBFP/Fee%20Setting?csf=1&web=1&e=kWKqaX) **My Files > OBFP > Fee Setting > VC/Unit**

*Contact* *Jasmine.Manuelyan@umb.edu* *if you have any problems accessing One Drive folder.*

* File names should include the name of your VC/Units as well as “Proposed AY 2021 – 22 fees”

Check one: New fee: Change to existing fee: Cancelation of an existing fee:

Check one:

* Non-mandatory student fees \_\_\_\_
* Student Fees for Revenue Based Operations Charges \_\_\_\_
* Administrative Charges Including Sales and Services \_\_\_\_

Effective term: mm/dd/yyyy End term (if applicable): mm/dd/yyyy

College: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Department Id Number / Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dept. Contact Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Dept. Contact Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Fee Description (Code): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Requested Fee Amount: $\_\_\_\_\_\_\_\_

If change or cancelation to existing fee, list the current Fee Amount: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Please provide a justification and brief impact statement addressing the following for the proposed new/revised/cancelled fee:**

1. Define how the fee will be charged — e.g. students in all programs, students in a specific program/major. If the proposed fee is a new fee, is it refundable: Yes: \_\_\_\_\_\_ No: \_\_\_\_\_
2. Specify approximately how many students, by student category (career), the proposed fee will affect — i.e. undergraduate, graduate, or non-degree
3. Provide a budget that details the expected annual revenue from the fee and the expenses that the fee will cover. If this is a current fee, please include how the current revenue is being used.
4. Provide a 3-year history of **ALL** the fees charged within the program/major of the proposed new or changed program/major fee.
5. If the fee is approved what would be the expected direct benefit to students in terms of enriching the student learning experience.
6. If the fee is **NOT** approved what would be the expected negative impact to students in terms of student learning experience.
7. Have you consulted with student government representatives: Yes: \_\_\_\_\_\_ No: \_\_\_\_\_\_

If Yes provide a brief outcome: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If Not give a short justification: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Use* [*“Proposed Fee Change Budget Impact”*](https://www.umb.edu/editor_uploads/images/af_budget/Proposed_Fee_Change_Budget_Impact_Form.xlsx) *form as a template for submitting the budget.*

*Contact Budget Office (**Matthew.Krevis@umb.edu* *or* *Jasmine.Manuelyan@umb.edu**) if you have any questions and/or if you encounter any other issues.*

Attach additional documentation as needed.

Recommended by:

Department Chair: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_

College Dean: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_

**Budget Office Use ONLY**

Date received: \_\_\_\_\_\_\_\_\_\_\_ Fee Code \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

VC for A&F: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_

Provost: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_

Notes:

Per UMASS BOT [POLICY ON THE APPROVAL PROCESS FOR TUITION, FEES AND OTHER CHARGES RELATED TO TRUST FUNDS](https://www.umassp.edu/sites/umassp.edu/files/content/Tuition%20%26%20Fees%20Related%20to%20Trust%20Funds7-14-16.pdf) :

1. Non-mandatory student fees – include optional or one-time fees or surcharges charged to students for specific services, or special academic program offerings and activities not required of the majority of students each year. Examples of non-mandatory student fees include but are not limited to: laboratory fees, international student exchange program fees, special academic program fees, identification card replacement fees. This group of charges also includes "passthrough" or "agency" fees for contracted services such as accident insurance and supplemental health insurance. The President approves non-mandatory student fee rates and the establishment of new non-mandatory fees. A schedule of all non-mandatory student fees shall be reported to the Board of Trustees annually.
2. Student Fees for Revenue Based Operations Charges–These charges are the principal charges for major auxiliary enterprise operations or major campus services funded by student fees or auxiliary revenues. Major auxiliary enterprises are services external, but contributing to, the basic academic mission of the University such as: boarding and residence halls, and corporate and continuing education. The charges are typically non-mandatory or optional. Major campus services are services provided by the campus to major campus constituencies (example: Parking and Transportation). The Board of Trustees approves the establishment of major student fee/revenue-based operations charges. The Board of Trustees may delegate fee approval authority to the President.
3. Administrative Charges Including Sales and Services–These charges are for the sale or use of goods or services that are incidental to the conduct of instruction, research or public service or for administrative services. Examples include but are not limited to: film rentals, sales of scientific and literary publications, testing services, fees for the use of scientific equipment or laboratories, university presses, copy center charges, workshops and conference charges, data processing services, application or late payment fees, etc. The authority to establish and set sales and service and administrative charges is delegated to the Chancellor. A schedule listing all major sales and service charges shall be reported to the President annually.