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July 22, 2010

CHANCELLORS

Dear Colleagues:

Enclosed are guidelines for campus implementation of the Student Services Fee portion of the *University of California Student Fee Policy*.

At their May 2010 meeting, The Regents approved revisions to the *University of California Student Fee Policy*. The revised policy is available online at: <http://www.universityofcalifornia.edu/regents/policies/3101.html>. Revisions to the policy include changing the name of the Registration Fee to the Student Services Fee, establishing a return-to-aid component for future increases in the Student Services Fee, listing factors for Presidential consideration when recommending the appropriate Student Services Fee level to the Board, expanding articulation of the role of students in setting the fee level, establishing a requirement that each campus maintain a website providing details about Student Services Fee allocations, and introducing a reference to Presidential guidelines on issues related to the Student Services Fee.

The enclosed "Guidelines for Implementing the Student Services Fee Portion of *The University of California Student Fee Policy*" discuss the use of Student Services Fee revenue, the recommended structure and responsibilities for Student Fee Advisory Committees, the recommended process for soliciting budget recommendations from Student Fee Advisory Committees, the annual Student Services Fee reports to the Office of the President, and the content of student fee websites. The guidelines also include an attachment which summarizes the key elements to be included in an annual report on expenditures for Student Services Fee-funded programs. The first annual report will be due to the UC Office of the President - Office of Budget and Capital Resources by December 1, 2010.

The guidelines are new and are effective for the 2010-11 academic year. To accommodate publication and notice schedules, the change of the name of the Registration Fee to the Student Services Fee will go into effect beginning with summer academic

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sessions in 2011. A separate communication from Office of the President will provide implementation information about changing the name of the Registration Fee to the Student Services Fee.

With best wishes, I am,

Sincerely yours,

A handwritten signature in black ink, appearing to read 'Mark G. Yudof', with a stylized, flowing script.

Mark G. Yudof
President

Enclosure

cc: Members, President's Cabinet
Associate Vice President Obley
Council of Vice Chancellors
Council of Graduate Deans
Campus Planning and Budget Officers
Universitywide Policy Office

Guidelines for Implementing the Student Services Fee Portion of The University of California Student Fee Policy

The intent of these *Guidelines* is to ensure the effective and appropriate use of the Student Services Fee (formerly referred to as the University Registration Fee) to support co-curricular student services and to ensure appropriate student input and oversight. The *Guidelines* provide interpretation to help translate the Student Services Fee portion of the *University of California Student Fee Policy* into appropriate campus practices that will achieve the *Policy's* goals. These *Guidelines* are intended to be sufficiently flexible and allow for exceptions at the campus level, based on recommendations made by the local Student Fee Advisory Committee and approved by the Chancellor. Changes in these *Guidelines* should be made in consultation with the Council on Student Fees and the Office of the President.

I. Use of Student Services Fee Revenue

As stated in the *University of California Student Fee Policy*, Student Services Fee revenue “shall be used to support services and programs that directly benefit students and that are complementary to, but not a part of, the core instructional program. These services and programs include, but are not limited to, operating and capital expenses for services related to the physical and psychological health and well-being of students; social, recreational, and cultural activities and programs; services related to campus life and campus community; technology expenses directly related to the service; and career support.”¹ Services and programs funded by the Student Services Fee should be broadly available to all students.

The Student Services Fee is subject to the University’s return-to-aid practice. Beginning in 2011-12, any new return-to-aid associated with the Student Services Fee will be funded from Student Services Fee revenue. The return-to-aid revenue will be used for student financial aid according to the guidelines for the University Student Aid Program.²

Because the intent of the Student Services Fee is to provide stable and adequate funding for student services that complement the instructional program, as endorsed by campus Student Fee Advisory Committees, the primary use of Student Services Fee revenue should be for student services programs and activities that are not traditionally supported by State funds. Student Services Fee funding should be prioritized for the direct costs of Student Services Fee-funded programs. Student Services Fee revenue can be used for the indirect costs associated with operating the student services programs and activities the Fee supports.

The primary focus of Student Services Fee revenue should not be on programs in the following areas; however, this does not preclude some Student Services Fee revenue from being used for these areas, consistent with the *University of California Student Fee Policy*:

- Enrollment/Registrar/Admissions Services
- Financial Aid Administration

¹ The *University of California Student Fee Policy* is available at <http://www.universityofcalifornia.edu/regents/policies/3101.html>.

² The guidelines for the University Student Aid Program are available at <http://www.ucop.edu/sas/sfs/docs/usap.pdf>.

- University Library
- Alumni Affairs and Alumni Student Services
- Planning and Budget Administrative Units
- Instructionally-related capital improvements
- Immediate office of the Vice Chancellor for Student Affairs
- Auxiliary Units, such as Housing, Parking Services
- Office for Students with Disabilities
- Intercollegiate Athletic Programs
- New Student/Transfer Student Orientation Programs
- Learning Skills Center
- Educational Opportunity Programs
- International Student Programs

While in general, campuses should not meet their budgetary priorities by shifting additional expenses onto the Student Services Fee, in years of fiscal shortfall, cuts to student services functions, perhaps achieved with funding shifts of programs to the Student Services Fee, may be unavoidable. Such cuts and/or funding shifts should be made only in consultation with the campus Student Fee Advisory Committee, as described below. Also, such cuts and/or funding shifts should maintain consistency with the *University of California Student Fee Policy* and these *Guidelines*.

II. Recommended Structure and Responsibilities for Student Fee Advisory Committees (SFACs)

The *University of California Student Fee Policy* states, “At each campus, the Chancellor or his/her designee annually shall solicit and actively consider student recommendations, with the intent of honoring as much as possible student recommendations on the following: the use of Student Services Fee revenue; and the annual Student Services Fee level to be set by the Regents.” Each campus should have in place a Student Fee Advisory Committee, comprising matriculated students, to advise on the use of revenue generated from the Student Services Fee. Each Chancellor should solicit annually and consider recommendations of the Student Fee Advisory Committee.

The following are recommended guidelines for the Committee:

1. The Committee is advisory to the Chancellor or his/her designee. The Chancellor or his/her designee will seek, to the extent feasible and within the context of campus priorities and strategic goals, to honor the recommendations of the Committee.
2. The Committee should be comprised of a majority of students who represent graduate, professional, and undergraduate students, and to the extent feasible, should reflect the relative populations of these students on each campus.
3. The Committee should maintain an official working relationship with undergraduate and graduate/professional student governments.
4. The Committee should designate a student representative on the Council on Student Fees.
5. The Committee should be provided with appropriate staff support, including a representative from the campus budget office.

6. The Committee should have access to appropriate office space with phone and computer.
7. Campuses should consider offering stipends to the Chair and Vice Chair of the Committee.
8. Operation of the Committee may be funded by Student Services Fee revenue.
9. The first Committee meeting of each academic year should occur not later than the fourth week of the fall quarter or semester. Unless otherwise recommended by the local Student Fee Advisory Committee, it is expected that the Committee should meet a minimum of three times each term.
10. The Committee should have purview over fees as specified in the Committee's bylaws.
11. The Committee should opine on or offer/decline endorsement of campus-based fee referenda.
12. The Committee should review student fee-funded and non-student-fee-funded non-instructional/curricular student services within the Committee's purview.
13. The Committee should maintain a regularly updated website accessible to all students containing:
 - a. Information about the Committee, such as:
 - i. Agendas;
 - ii. Meeting minutes, posted within one month after each meeting;
 - iii. Governing documents, including bylaws with membership selection policies and procedures;
 - iv. Membership roster;
 - v. Committee recommendations from previous years;
 - vi. As stated in the *University of California Student Fee Policy*, "...details on how the Student Services Fee has been allocated relative to the recommendation of the Student Fee Advisory Committee";
 - vii. A summary of how Student Services Fee revenue has been expended;
 - b. The *University of California Student Fee Policy*;
 - c. Other relevant student fee policies; and
 - d. *Guidelines for Implementing the Student Services Fee Portion of the University of California Student Fee Policy*.

III. Recommended Process for Soliciting Budget Recommendations from Student Fee Advisory Committees

At a minimum, the following should be practiced in support of Student Fee Advisory Committee budget deliberations:

1. At the beginning of each academic year, the Committee should be briefed on the campus's budget and budget climate.
2. Each Committee should be presented with the entire Student Services Fee base budget for the current academic year during the fall quarter or semester. Budget information provided to the Committee should include clearly understandable data on direct and any indirect costs funded by the Student Services Fee.
3. The Committee should work directly with the campus budget office to determine the level of budget information and detail needed to fulfill their responsibilities. Student

Services Fee-funded units should make their full budgets available to the Committee in time to allow the Committee to have the information necessary to make budget recommendations. As needed to ensure an appropriate analysis, the Committee should be provided the ability to review Student Services Fee-supported programs within the context of all funds supporting those programs.

4. Each Committee should have the ability to visit, review and request budget clarification from Student Services Fee-funded units.
5. Additional documentation requested by the Committee should be produced in a timely manner.
6. Each Committee should have the ability to review and make short- and long-term allocation recommendations to the Chancellor or his/her designee on all Student Services Fee funds.

IV. Annual Student Services Fee Reports

At a minimum, the Committee should have access to the budget, including historical information, for each program, service, or activity supported by the Student Services Fee. Attachment A summarizes the key budget and data elements to be included in an annual report on expenditures for Student Services Fee-funded programs. Each campus has the flexibility to develop its own budget template format; however, the template should be developed in consultation with the local Student Fee Advisory Committee. The report will be due to the Office of the President (the Office of Budget and Capital Resources) by December 1 each year. This report should be made widely accessible through each campus's website. In addition, the Office of Budget and Capital Resources at the Office of the President will be responsible for ensuring easy access to all campus reports on an Office of the President website which will provide updated reports each year.

V. Student Fee Websites

Each campus should have fee information on their respective websites that is as complete as possible. For instance, campus fee websites should include levels and definitions of all mandatory systemwide fees (i.e., the Educational Fee and Student Services Fee); campus-based fees; Course Materials and Services Fees; user fees; and miscellaneous fees. Fees should be clearly listed by student type and level (e.g., resident and nonresident undergraduate; resident and nonresident graduate academic; resident and nonresident graduate professional in business; etc.). In addition, term fee levels (including summer) and annual fee levels should be clearly identified.

Students and their families should be able to access campus fee websites easily from campus home pages, as well as by using major search engines.

Campuses are encouraged to seek the input of students regarding the content, layout, and accessibility of campus fee websites.

(Attachment)

Attachment A:

Annual Student Services Fee Reports

At minimum, annual reports on Student Services Fee allocations and expenditures should include:

- A complete view of how Student Services Fee revenue is allocated. This information should be shown via organizational breakdown, by function or program, of sufficient detail so readers can understand what Student Services Fee funds are being spent on;
- Summaries of total Student Services Fee allocations and actual expenditures, including carryforward/reserve funds; and
- A year-over-year comparison of total Student Services Fee allocations, actual expenditures, and carry-forward/reserve funds. Two years of data should be included in each annual report.

A sample annual report template is shown below.

Sample Student Services Fee Report Template

FEE REVENUE

	<u>Income Actuals - Two Years Ago</u>	<u>Income Actuals - Prior Year</u>
Fall		
Winter		
Spring		
Other		
Return-to-Aid		
Total		

	<u>Projected Income - Current Year</u>	
	<u>Amount</u>	<u># of Students</u>
Fee Revenue prior to fee increase		Estimate
Fee Revenue from fee increase		
Return-to-Aid		
Total		

