**Course Materials Fees**

**Fund Application and Budget Summary**

University of California, Los Angeles

Date:

School:

Department:

Course Name and Number for Which Fee is Proposed (cannot be variables topics course):

Proposed Title for Fee:

**Instructions:**

Please complete the form. For questions, contact Rebecca Lee-Garcia (rleegarcia@ponet.ucla.edu).

**Summary of approval process**:

* Submit an electronic completed form with approval signatures to Rebecca Lee-Garcia.
* **Student Fee Advisory Committee (SFAC):**
* SFAC will choose a date as to when APB can present the proposed fee to the committee.
* SFAC writes a letter to the Chancellor stating whether they recommend approval of the fee
* **Chancellor approval:**
* The Chancellor takes SFAC’s recommendation into consideration when deciding whether to approve fee, and then sends a letter to all involved parties on his decision.
* Fees must be approved by the Chancellor by the following dates:

 For Implementation of Fee by:

 Fall Quarter – Chancellor must approve by **May 15**

 Winter Quarter – Chancellor must approve by **Oct 15**

 Spring Quarter - Chancellor must approve by **Jan 15**

## Approvals

Plan endorsed by:

[ ] \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

 Dean or Provost

[ ]  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

 Assistant Dean/CFO

 [ ]  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

 Department Chair

**PART A: QUESTIONNAIRE**

**Fee Information**

1. List the course number and course name for which the course materials fee is proposed. Also provide a brief description of the course.
2. Describe the materials and supplies, tools and equipment, or special supplemental educational experience which will be funded with this new fee. Differentiate between the perishable or consumable supplies and non-perishable or re-usable supplies.
3. Is the fee an existing course materials fee?
	1. If so, how much is the current fee?
	2. When was the fee established or last increased?
4. State the proposed amount of the course materials fee. The amount should be stated in terms such as “per course” or “per credit hour” or “per term.”
5. Describe any planned increases to the fee stated above. Do you plan to regularly increase the fee by an inflationary factor such as CPI? [If increasing by CPI, APB recommends using annual CPI increase based on All Urban Consumers for Los Angeles-Long Beach-Anaheim, CA – please indicate if you would prefer a different metric.]
6. What is the first academic quarter and fiscal year that this fee would be assessed to students?
7. Explain the need for the University to charge students for the course materials. What cost pressures, if any, are driving the need to establish this fee?

**Student Impact**

1. Demonstrate that there is a reasonable relation between the fee and the benefit to the student. What does the student get for the fee?
2. In order to ensure that high quality student input is integrated into the fee proposal, please provide detailed information on the methods of gathering input from students. Questions to students should address the usefulness about the materials or services during the course and the reasonable cost of the fee. Questions should also address the willingness of students to take the course if the proposed fee is approved. Describe the student involvement in the process and the nature of the student input. Document the students’ responses.

Refer to the APB website for an example of a student survey that could be used to gather information from students:

<https://www.apb.ucla.edu/Portals/90/Documents/Fee%20Policies/Survey%20Example_Course%20Material%20Fees.docx>

**Budget Information**

1. Is it appropriate to refund any portion of the fee if a student withdraws from a course after the fee assessment deadline and returns the unused portion of the materials or supplies in reusable condition? If so, how would the amount of the refund be determined? If not, why not? Relate the refund determination to the nature of the materials and supplies described in Item #1.
2. If the course materials fee is currently being administered through an existing account/fund, provide the FAU where the income is being recorded and the FAU where the expenses are being reported.
3. Complete **Part B** and prepare a one-year budget for the fee. *(See* ***Part B****: Attach supplemental sheets if necessary.)*
* Show the estimated annual revenue resulting from the fee proposed in Item 3 ($/course times annual enrollment or $/credit hour times credit hour per course times annual enrollment). Show any other subsidies provided from funds available to the Dean or Chair.
* Show all expenses for supplies, consumable materials and support services associated with each course. Identify the specific expenses suitable to be off-set by the proposed fee.
1. If the course requires specific support personnel:
* List the positions, the annual salary, the percentage of the FTE in support of the course, and the pro-rated salary in support of the course.
1. If the course materials fee underwrites the cost of equipment:
* List the items, their estimated cost and the projected date of purchase. Include a depreciation and replacement schedule.
1. If a material or supply inventory is to be maintained:
* List the items with a description and their estimated fiscal year-end value.

**PART B: BUDGET SUMMARY**

Please provide table in Excel file. Complete and submit Excel file, and also copy/paste here.

|  |  |
| --- | --- |
| **Course Materials Fee Budget Summary** |  |
| Course:  |  |
| Fiscal Year: |  |
|  |  |
| **Revenue** |  |
| Estimated Annual Student Enrollment |  -  |
| Fee per student per quarter |  -  |
| Total Annual Fee Revenue |  -  |
|  |  |
| Carryforward Balance from Previous Year |  -  |
| Other  |  -  |
| **Total Revenue** |  -  |
|  |  |
| **Expenditures** |  |
| *State all expenditures associated with* |  -  |
|  *course materials fee* |  -  |
|  |  -  |
|  |  -  |
|  |  -  |
| **Total Expenditures** |  -  |
|  |  |
| **Ending Balance** |  **-**  |