**CU Denver|Anschutz Medical Campus**

**Student Fee Request Submission Requirements and Process**

**FY 2022-23**

**PROCESS**

1. Please familiarize yourself with the CU Denver|Anschutz Medical Campus Institutional Student Fee Plan, the Reserve Funds and Reserve Fund Transfer policy, and these Student Fee Request Submission Requirements and Process before submitting your request. You are responsible for compliance with these documents in proposing your new fees, fee increases or decreases, or changes to the purpose of your fee. The Regents of the University of Colorado will use the information in your submission to approve (or deny or revise) your request, so the forms must be accurate and complete.
2. You must use one form per fee. You cannot submit multiple fees in one request or on one Word or Excel form.
3. Please only submit fees that are per student per term, or per student per credit hour. Avoid requesting one fee per year per student or targeting special types of students or particular courses. One-time fees require additional administrative coordination and are less likely to be approved.
4. Please use new forms only for your fee request proposals for FY 22-23. Requests not using the new forms will be returned.
* Complete Form A for any kind of student fee change of any amount, including changing the purpose of a fee with no change in the amount.
* Complete the “Student Input Summary” Section of Form A for any student fee change except fee decreases, eliminating fees, or cost of living adjustment (COLA) increases directly related to the current approved purpose of the fee.
* Complete Form B for any current fee increases, including COLA, or fee decreases.
* Complete Form C for any new fees.
* If you are converting fees (combining fees into a new program fee or changing fee frequency), they need to be cost neutral as submitted on Form A and Form B. If you are further requesting an increase to the cost neutral converted fee, this request for increase must be submitted independently with a separate Form A and Form B. If you need assistance with a conversion, please contact the Senior Director of Revenue Projections.
1. Please fill out every section of Form A. Please use N/A if you feel a question is not applicable. The information on the form will be used to defend your request, so please be thoughtful and clear, assuming that the reader is not familiar with your fee or need.
2. The proposed purpose of fees must be clearly documented in any requests for new fees or fee changes. Your documentation of the proposed purpose of the fee will be used to develop language for both Regent approval and for inclusion on the Bursar’s website, so please ensure that the description provided is relevant, detailed, and understandable. All items included in the proposed fee purpose must be allowable per guidance in this document. Only expenses for the items listed in the final approved fee purposes may be covered by the fee revenue, and any spending for an unallowed purpose will be required to be reimbursed from non-fee funds. Final fee purpose language that goes to the Regents for approval and is posted on the Bursar’s website will be developed in conjunction with and approved by the requesting unit via email.
3. Form A requires the signature of the person submitting the fee request and the Dean (for a school or college) or the applicable Associate Vice Chancellor or above (for administrative areas). These signatures indicate approval of the request as submitted, accuracy of the information submitted, and support for the request as a University need.
4. A budget is required as part of the submission. This is Form B or C (see item #4 above). The budget must accomplish three things:
	* It must illustrate each specific cost (i.e., list of different positions and types of operating costs on separate lines) so the MFRT can review the types of expenditures for the fee. Do not simply list “COLA” or the name of the fee, list each expense associated with the fee;
	* It must confirm the number of students, credit hours, or terms projected, and;
	* Its calculation must yield the total request, which equals the amount on the first page of Form A. If expenses for the items requested exceed the fee revenue (i.e., salary), these expenses must be covered by non-fee funds. Please ensure that you have checked the box acknowledging your understanding of this on Form B or Form C.
5. If, upon receipt, the Management Fee Review Team (MFRT) believes that more information is required, the form will be returned for you to complete or expand. E-mail supplements cannot be accepted. Incomplete forms may cause a delay in the determination of your request.
6. Once a determination on Form A has been signed, a copy will be returned to the requester for your records.

**COST OF LIVING ADJUSTMENT (COLA) INCREASES**

Entities can request an increase to current fees inflated by the amount of the Consumer Price Index provided by Budget and Finance to cover the costs of increases in cost of living. It is not required to obtain student input for increases of no more than COLA. These increases must directly relate to the current approved purpose of the fee and may only be presented as a cost of living increase if the purpose of the increase is to address defensible inflationary increases in the costs that are funded by the current fee. Please address how this requirement is met in the “Rationale for Request” section of Form A. By submitting the request form, the requester certifies that the cost of living increase does not change the current scope of the fee revenue and addresses only items affected by the increased cost of living. For instance, if a portion of the fee covers a vendor charge for immunization, a cost of living should not be requested if that portion of the fee is not being increased by the vendor.

If requesting a cost of living adjustment increase for an existing fee for FY 2022-23, please use **2.3%** for the November 1, 2021 submission date[[1]](#footnote-1). This will be the percentage presented to the Regents and will not change even if there are subsequent revisions to the COLA by various State entities. The Management Fee Review Team needs to understand the scope of your COLA request (i.e., how many students are impacted, is the impact by term or credit hour, estimated budget you will need), so please complete the rationale on the form.

**STUDENT INPUT**

1. In keeping with the Institutional Student Fee Plan, administrative and Regent fee approval do not require a referendum. Approval does require, however, when the fee exceeds cost of inflation, consultation with affected students in the school, college, or unit charging the fee and documentation of views expressed. This consultation must be documented on Form A. The purpose of this requirement is to seek documented input from those students most likely to be affected by the course or instructional/program fees.
2. Student input is not required for fee decreases, eliminating fees, or cost of living adjustments. Otherwise, student input must be obtained in one of the methods outlined in item #3 below.
3. The following is a list of pre-approved options for obtaining student input. If student feedback is required, the fee request will not be approved if the method of input is not documented. Please utilize one of these options as best appropriate for your fee request. If you need assistance with identifying an appropriate method of obtaining student input, please contact the Senior Director of Revenue Projections.
* Schools and colleges may establish an official college or school student council/group for student fee feedback, or use an existing one, for use whenever requesting a new fee or increasing a fee above the cost of inflation. This student council would be established in accordance with the student or senate constitution, as applicable by campus.

For schools and colleges that utilize a student council/group for student fee feedback, the student council/group will need to submit a document summarizing 1) their understanding of the fee request or summary of the fee request and 2) feedback to the school/college about the fee change. A letter from the council/group may be attached but cannot replace the summary of Form A. Minutes from student council meetings documenting student discussion and feedback may be submitted in place of this letter.

* Feedback may be obtained from at least 10 students most likely to be affected by the change to the fee or to pay a new proposed fee. This method is most appropriate for staff-initiated requests, schools/colleges without an official student council/group as described above, or if a school/college determines that this method is most appropriate to obtain feedback from affected students (for example, if the fee is only for graduate students, the school/college may present the proposed change only to graduate students rather than a school/college-wide student group that includes undergraduate students).
* Some fees require submission to and approval by the Denver Campus Student Fee Review Committee (SFRC) or the Academic and Student Affairs Leadership Committee (ASAL) on the Anschutz Medical Campus (campus-wide fees, student purpose/activity fees that fund many Student Life offices and single purpose fees). It is also possible to submit your request for student input informally to these groups. The SFRC or ASAL written response will suffice to cover student input and does not require additional feedback by a separate student council/group or other feedback, as long as the student input summary is completed as required on Form A and the SFRC/ASAL document is attached. If a staff-initiated fee request affects a student purpose or activity fee, the staff-initiator must present the request to either the SFRC or ASAL as appropriate.
1. A summary of Student Input must be provided on Form A, including a) steps that were taken to seek input, b) what was stated in response to request for input, and c) dates that input was both requested and received. If feedback is not supportive, indicate how student feedback was considered before submitting proposal. Detailed information must be provided that describes that a process to obtain student input was used.

**TIMING**

1. Although the agenda of the Regent meetings are never certain, fee requests are generally presented and discussed at the annual February meeting, and voted on during the April Regent meeting. The timeline is created to meet these dates.
2. Although forms are due on November 1, 2021 CU Denver|Anschutz Medical Campus will not finalize fees for the February Regent Meeting until January 6, 2022. While we cannot revise many fees after the original submission date, urgent and critical issues may be addressed in November and December if a written request is submitted. If you feel you have an urgent and critical revision that cannot be addressed in next year’s process, please submit a revised form with the changes highlighted in yellow. **Only fee amount refinements can be changed after November 1, 2021.**
3. It is possible for CU Denver|Anschutz Medical Campus to present fee revisions for critical issues as late as the April Regent meeting, if approved by the Executive Vice Chancellor of Administration and Finance. One example is if a student referendum vote revises a fee request (i.e., a fee change does not pass). Fee presentations at the April meeting create heightened scrutiny, but this may be necessary in rare instances.
4. The best approach for modifications required after January is to wait for the next year to refine projected fee revenue. You might have a fund balance or other one time funds to address a shortfall, or you could reduce the increase or lower the fee in the subsequent year to address an overage.
5. There can be no changes to any fees or fee requests for next year after the April Regent meeting.

**DEFINITIONS**

**Course Fees** are generally designed to cover the incremental cost of materials and supplies to offer the particular course. Course fees are mandatory fees that a student must pay to enroll in specific courses, such as lab fees, music fees, art fees, materials fees, and telecourse fees. Course fees may also cover the contractual cost of providing a service supporting the course curriculum such as CPR certification costs or standardized patient use. Revenue from course fees must be spent in the year it is collected for the course for which it was collected. All sections of the same course offering must have the same course fee charge for all sections. Revenue from course fees may only be spent on items approved by the University of Colorado Board of Regents during the annual fee approval process and in compliance with Institutional Student Fee Plan and this Student Fee Request Submission Requirements and Process. Course fees should not be used for general (not specific to the course) classroom materials and supplies or to generate funds for repair or replacement of equipment in excess of the actual costs necessary for covering the breakage of equipment. Course fees are rarely used on the Denver and Anschutz Medical Campuses.

**Program Fees** help to manage expenses by pooling the resources from fees charged to all students in a program to provide sufficient funding to schools and colleges for specific instructional purposes. Program fees are mandatory fees related to the instructional program or college, but not to the specific course offering. Some program fees are college-specific fees and some are major-, program-, unit- or department specific. They can be academic, instructional, or administrative charges. Technology fees associated with the offering of online, non-cash funded courses are considered program fees. Revenue from program fees may only be spent on items approved by the University of Colorado Board of Regents during the annual fee approval process and in compliance with Institutional Student Fee Plan and this Student Fee Request Submission Requirements and Process.

**Student Purpose Fees** areapplied to an entire campus, combined campuses, or a specified cohort of a campus student body (such as all Anschutz students in clinically-based professional training programs). In all cases, this fee is not confined to a particular school, program, or course. Student Purpose Fees include support for student centers, recreation facilities, parking lots, intercollegiate athletics, child care centers, Student Activity Fees, campus health clinics, contract health services, student government, student activities. This fee process addresses Student Purpose/Activity fees that fund student government, student clubs and organizations (which have university advisors), and student-directed programs (which do not have student advisors). For Denver Campus-only fees, proposals are reviewed by the Denver Campus Student Fee Review Committee, which includes at a minimum members representing the schools and colleges and members representing central administration. For Anschutz Medical Campus-only fees, proposals are reviewed by the Academic and Student Affairs Leadership Committee.

**Administrative Fees** provide support for broad administrative or instructional related services, e.g., technology support and infrastructure (including systems support), library use, and general purpose academic and administrative operations, facility construction, and debt reduction. Administrative fees are not established by schools or colleges.

The **Management Fee Review Team** (MFRT) includes the Bursar, the Assistant Vice Chancellor for Student Affairs (Anschutz), the Assistant Vice Chancellor for Student Success (Denver), and the Senior Director of Revenue Projections (lead). The MFRT makes recommendations to the Provost, the Executive Vice Chancellor for Administration and Finance, and the Senior Vice Chancellor for Administration and Finance.

A **Student Fee Review Committee** exists on the Denver campus. See the Institutional Fee Plan for more information. This Committee is established under the authority of bylaws.

**PURPOSES**

If specified in the request and approved by the Regents, Course Fees (specific to a course) and Program fees (specific to a program, school, college, or unit) may be used for:

* Salaries, wages, and benefits for instructional support activities or student fee-funded positions (i.e. teaching assistants, etc.), except that such personnel may not serve as the instructor of record;
* Operating and equipment (such as computers) for student fee-funded positions;
* For student fee-funded positions, professional development and conferences (including travel costs) that are directly related to the approved fee purpose (i.e., advising conferences or technological training for lab monitors);
* The purchase of the typical laboratory supplies;
* Materials and equipment used in lab or field experiments;
* Materials and equipment for language laboratory technology;
* Materials and equipment for lab modifications;
* Learning/tutoring assistance centers as targeted for a specific program;
* Immunization compliance management;
* Furniture and equipment for specific program use (including laboratory furnishings);
* Facility remodeling of student fee-funded space, such as labs;
* Student recruitment for the specific program identified;
* Travel costs related to program specific field trips;
* Student academic or career advising that is school/college specific, including internship placement;
* Charges for maintenance required for the continued use of allowable items purchased with instructional program fees; or
* Purchases of instructional equipment and supplies for instructional use in specific programs, including but not limited to: computers in student labs, plotters and printers, simulators, instructional photocopying, multimedia products, Instructional video and audiotapes, instructional CD-ROM disks, course specific software and/or licenses and upgrades, scientific laboratory instruments, testing equipment, test protocols, diagnostic hardware/software, art studio technologies, electronic music technology, cameras, audio/visual equipment, course specific web design costs, SMART classroom equipment in CU Denver owned space.

Neither Course Fees nor Program Fees may be used for:

* Salaries, wages, and benefits for general staff or offices (non-instructional support) that are not funded by the student fee;
* Operating and equipment (such as computers) for staff or offices not funded by the student fee, including photocopying;
* General administrative office supplies for staff or offices (examples include but not limited to: paper, pens, binders, folders, note pads, calendars & planners, desk organizers, tape & adhesives, envelopes, etc.) not funded by the student fee;
* Professional development and conferences for staff not funded by the student fee;
* Furniture for administrative areas;
* Direct instructional activities (i.e. for faculty or instructors salary and benefits);
* Instructor of record (including leading scheduled discussion sections, recitations, or lab sections, or grading of assignments);
* Student teaching assistantships if they are the instructor of record;
* Graders;
* Personnel recruiting expenses;
* General advertising or marketing (although fee revenues may be used for advertising/marketing the service that is funded by the fee);
* Equipment not accessible to students;
* Facility remodeling for non-program modifications or for space not funded by the student fee;
* Regular classroom materials and supplies, such as chairs or desks, chalk or erasers, or equipment for AHEC SMART classrooms;
* Scholarships;
* Travel for students, except costs related to program specific field trips;
* Entertainment;
* Special functions for faculty or staff;
* Vehicle rental except when related to program specific field trips;
* Faculty computers and general, non-course specific, software; or
* Anything not specifically in the request and approved by the Regents.

**ACCOUNTING FOR FEE REVENUE AND EXPENSES**

Revenue and the related expenses for course or program fees must be accounted for separately in a unique speedtype and not comingled with any other departmental revenues and expenses. If a school or college collects two or more fees for different purposes, each unique fee and the related expense shall be accounted for separately.  The Finance Office will maintain a campus-level listing of fee speedtypes and any associated fee reserve speedtypes, which will be sent to schools/colleges annually to ensure accuracy and completeness.

Unspent fee revenue must be kept to a minimum. At the end of the fiscal year, any unspent fee budget must be carried forward to the new fiscal year and into the same course or instructional program fee speedtype(s). Year-end balances may not be transferred to another departmental speedtype. A spending plan for carryforwards must be submitted to the Budget Office by August 15th. Student Fee carryforward balances greater than $100,000 will be monitored annually by the Compliance unit of Financial Service. The Compliance Unit will also select an audit sample of student fee carry balance equal to or less than $100,000 annually to monitor for compliance as well. If it appears that there is not an approved use of the carryforward funds after one year, Financial Compliance will notify Budget and Finance who will in turn inform the applicable school, college or unit administrator that the fee must be reduced in the next fee cycle(s) to reflect actual/anticipated student fee expenses.

A balance may be transferred into a reserve fund speedtype for the future acquisition of capital equipment or an allowable project (note - there must be a one to one relationship between the student fee revenue source and the related reserve fund speedtype).  In this case, the school or college must annually submit a Reserve Spending Plan to the Finance Office in accordance with the campus Reserve Funds and Reserve Fund Transfers policy. This spending plan must include the balance at June 30, specifies the amount anticipated to be spent in each of the next four fiscal years, and includes a spending plan description that complies with the Board approved fee purpose.  This spending plan must be approved by the applicable school/college Senior Business Administrator on the Denver Campus, the applicable school/college Anschutz Medical Campus Senior Administrator, or Associate Vice Chancellor or above for administrative units via email and sent to the Finance Office by August 15th of each year. The Compliance unit of Financial Services will annually monitor fund balances. The Compliance unit will notify Budget and Finance of any non-compliance spending plan who will in turn inform the applicable school, college or unit to reduce the student fee in the next fee cycle(s) in order to eliminate the balance in a timely manner. If the school, college, or unit wishes to use the fee balance on a purpose other than originally approved for the fee revenue, a fee request must be submitted through this process for approval by the Board of Regents.

**Timeline\***

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| **Item** | **Date** | **Affected Parties** |
| Forms, Timeline, and Process Published | August 9, 2021 | Schools, Colleges, CU Denver Staff-Initiated Requests |
| Training on Forms and Process by MFRT Lead |  | Schools, Colleges, CU Denver Staff-Initiated Requests |
| **Completed Forms due to MFRT Lead** | **November 1, 2021** | **Schools, Colleges, CU Denver Staff-Initiated Requests** |
| MFRT Lead Scans for Completion and Notifies Requestors | November 8, 2021 | Schools, Colleges, CU Denver Staff-Initiated Requests |
| Incomplete Fee Request Revisions due to MFRT Lead. **No further revisions accepted.** | November 15, 2021 | Schools, Colleges, CU Denver Staff-Initiated Requests |
| Review of Complete Fee Requests by the MFRT Begins | November 17, 2021 | Schools, Colleges, CU Denver Staff-Initiated Requests |
| SFRC submits proposals and recommendations to MFRT | December 21, 2021 | SFRC, MFRT |
| MFRT Completes Reviews | December 27, 2021 | Schools, Colleges, CU Denver Staff-Initiated Requests |
| Management Fee Review Team Makes Proposals to VCAF and Provost | December 29, 2021 | Schools, Colleges, CU Denver Staff-Initiated Requests |
| Determinations Submitted to Requestors | January 7, 2022 | Schools, Colleges, CU Denver Staff-Initiated Requests |
| MFRT presents templates to CU System | January 7, 2022 | Budget and Finance |
| All CU Campuses Present Fee Requests to Regents | February 10, 2022 | Leadership |
| Regents Vote on Fee Requests  | April 1, 2022 | All |

**\*Timeline past December 2021 is tentative and based on preliminary Regent calendar.**

1. Source: Colorado Office of State Planning and Budgeting [↑](#footnote-ref-1)