

University of Hawai'i at Mānoa

Instructions for Fee Proposals

BACKGROUND AND CONTEXT:

"Fees" refer to all mandatory and required charges other than the cost of tuition. Hawai'i Administrative Rules §20-15-1 and [Board of Regents Policy Chapter 6.203](#) authorize the University of Hawai'i to establish user fees for services provided by various programs at the University of Hawai'i. The establishment of new fees requires Board of Regents (BOR) approval. Any increases or decreases to fees require BOR approval unless authority is delegated to the President or authorized designees. Under BOR and Executive policies, there are seven categories of fees which include: 1) Professional Fees, 2) Mandatory Student Fees, 3) Housing Fees, 4) Course and Laboratory Fees, 5) Transaction and Service Fees, 6) Ancillary and Auxiliary Service Fees, 7) Commercial Enterprise and Other Self-Supporting Operations, and 8) Athletic Admission Fees and Charges to Athletic Events (see Chapter 6, Appendix 1).

PROPOSALS:

The Requesting Unit is responsible for engaging in consultation with impacted groups prior to submitting a fee proposal. Proposals will include a cover letter, statement, and projected budget (see Appendix A). It is strongly recommended that memoranda and proposals be reviewed by the appropriate Vice Provost while still in draft form, to ensure that necessary changes are made *before* the documents are routed for signatures.

TIMELINE:

As a best practice, all new fees or rate increases will only be implemented in the Fall. All proposals must be submitted and approved a year prior to the Fall semester in which the fee will be implemented. For example, if a department is proposing that a course fee be implemented during Fall 2021, the completed proposal must be submitted to the Campus Fee Advisory Committee during Fall 2020. Please allow adequate time to work with the appropriate Vice Provost and the Campus Fee Committee prior to submission, as proposals often require revisions/additional information.

CAMPUS FEE ADVISORY COMMITTEE:

The Campus Fee Advisory Committee is promulgated by the Provost and serves as the Provost's review of proposed campus fees. The Committee makes recommendations to the Provost regarding campus fee proposals. The Committee is comprised of representatives from the Vice Provost for Student Success; the Vice Provost for Academic Excellence; the Vice Provost for Enrollment Management; the Vice Provost for Research and Scholarship; the Mānoa Office of Business and Finance; the Associated Students of the University of Hawai'i (ASUH); the Graduate Student Organization (GSO); the Mānoa Faculty Senate; and the Staff Senate. The Vice Provost for Student Success serves as the facilitator of the Committee. The purpose and objectives of the Committee is as follows:

- To evaluate proposals pertaining to the establishment of new fees, abolishment of existing fees, or revisions to current fees.
- To provide an assessment to the Provost regarding the implementation or revisions of the proposed campus fee.

The Committee will consider the following in its assessment:

- The population impacted by the proposed fee
- The impact of the fee on the level and quality of service provided
- The impact of the fee on the student's cost of attendance budget, as applicable
- Results of consultative the processes with the impacted population
- Similar fees at peer and/or benchmark institutions
- Evidence demonstrating that fees structure covers cost of services at the university
- Manner in which the fees will be collected and allocated
- Manner in which the fees will be expended. A budget should be included illustrating budget details

INSTRUCTIONS FOR FEE PROPOSALS:

Proposals will include:

- 1) Fee Proposal Form (see attachment)
- 2) Action Memo request (see format) <http://go.hawaii.edu/WDA>

Please see the chart below to identify if the Memo should be addressed to the Chair of the Board of Regents or the UH System President.

Fee Type	Description/Examples	Authority to Establish New Fee	Authority to Increase/Decrease Already Established Fee
Professional	For select professional programs that have high costs in comparison to other instructional programs with the same tuition. Generally assessed once each semester during enrollment in the program, but not necessarily applied during summer or other short terms.	BOR	BOR
Mandatory Student	Student organization fees. Used to fund the operations of student governance organizations and other co-curricular student activities, publications, broadcasting, and campus center operations.	BOR	President *
Housing	Housing fees, including associated meal plans, which are used to offset the operational costs of housing, bond indebtedness associated with housing revenue bonds, and maintenance and repair programs for housing. Housing fees may be developed for semester long attendance and for short term stays.	BOR	BOR
Course & Laboratory	Select courses that have unique costs in comparison to standard offerings or which are outside the normal credit course offerings.	BOR	President
Transaction & Service	Assessed to users of selected services as a means to offset all or part of the cost of providing the service or as a result of other directly related costs incurred to the institution.	BOR	President
Ancillary & Auxiliary	Charges for certain University services used by students, faculty, staff, and the general public. Programs shall be responsible for providing public notice of the applicable charges.	BOR	President
Commercial Enterprise & Other Self-Supporting Operations	Certain programs, goods, and services provided by the University to students and the general community on a self-support basis. Because the charges associated with these programs, goods, and services are subject to market demand, changing supply costs, competition, and rapid change, they are not subject to prior approval by the Board.	BOR	President
Athletic admission fees and charges to athletic events	Charges to university athletic events based on the premise that athletic programs are expected to be largely self-sufficient while providing one of the major venues for interaction between the university and its external constituencies.	BOR	President

*Up to 3% per year, but no more than the increase in the real cost of services provided to the students (RP 6.203).

Presentation to the Campus Fee Advisory Committee:

Responsible Person	Action
Requesting Unit	Consults with impacted groups and secures support for the proposal from the appropriate Vice Provost prior to submitting the proposal and Action Memo.
Requesting Unit	Submits the fee proposal (enclosed) and Action Memo to the appropriate Vice Provost for review.
Office of the Vice Provost	Appropriate Vice Provost conducts initial review of proposal and works with requesting unit to make necessary edits/additions prior to forwarding to the Vice Provost for Student Success who serves as the Fee Advisory Committee Chair Facilitator.
Fee Committee Facilitator	Reviews and develops background materials for further analysis prior to committee review. Once the proposal has been deemed complete, a presentation by the Requesting Unit will be scheduled.
Campus Fee Advisory Committee	Reviews the written proposal and presentation by the Requesting Unit. Following the presentation, the Committee develops a recommendation to the Provost.
Fee Committee Facilitator	Forwards proposal and Committee recommendation back to the appropriate Vice Provost to sign. The Action Memo, proposal, and Committee recommendation will then go to the Vice Provost for reviewing/signing.
Vice Provost	Reviews recommendations from the Committee and if approved, forwards the proposal and Action Memo back to the appropriate Vice Provost for documentation.
Office of the Vice Provost	Forwards all original documents to the Provost and the President or Board of Regents, as required. If approved, President returns the original to the Provost who will then forward copies to the appropriate Vice Provost/Requesting Unit, and other relevant offices (Bursar's Office, Cashier's Office, Financial Aid Office, Budget Office, Registrar, Catalog Office, etc.).

**University of Hawai'i at Mānoa
Fee Proposal Form**

Name of Fee: _____ **Effective Term: FALL** _____

Proposed action:

- Establish a new fee/person of \$ _____
- Change an existing fee. Current amount of the fee/person \$ _____
 - Increase the fee/person to \$ _____
 - Decrease the fee/person to \$ _____
 - Eliminate the fee _____

Check Fee Type (refer to Board of Regents policies [Board of Regents Policy Chapter 6.203](#)):

- Mandatory Student Fees: *list type* _____
- Professional Fees: *list type* _____
- Housing Fees: *list type* _____
- Ancillary and Auxiliary Service Fees: *list type* _____
- Course and Laboratory Fees: *list type* _____
- Transaction and Service Fees: *list type* _____
- Commercial Enterprise and other Self-Supporting operations: *list type* _____
- Athletic Admission Fees and Charges to Athletic Events: *list type* _____

* Requestor Signature Printed Name Date

Requestor Department: _____ Contact #: _____ Email Address: _____

* Requestor must secure approvals from the appropriate Vice Provost prior to submitting the proposal for review by the Campus Fee Advisory Committee.

Cross-Listed Unit Signature Printed Name Date

Cross-Listed/Honors Unit(s): _____ Cross-Listed/Honors Course(s): _____

Fee Advisory Chair Signature Printed Name Date recommend
 not recommend

Vice Provost Signature Printed Name Date recommend
 not recommend

Provost Signature Printed Name Date recommend
 not recommend

President Signature Printed Name Date approved
 disapproved

Fee Proposal for Review – Page 2
Proposal Statement

Name of Proposed Fee: _____

- I. Purpose of the fee (new, increase, decrease), who will be charged, and a statement of need
- II. Explanation of how the proposed fee will impact the level and quality of service provided
 - Record of previous fee increases, decreases, and implementation dates
 - What other resources have been used in the past/considered to cover these services/materials?
 - What is the benefit to the individuals receiving these materials/services?
- III. Supporting analysis
 - The impact of the fee on the student's cost of attendance budget
 - Comparisons of fees at peer and/or benchmark institutions
 - Evidence demonstrating that the fee structure covers cost of services at the university
 - Results of consultation with impacted individuals
- IV. Explanation of how fees will be collected and allocated.

Fee Proposal for Review - Page 3
Fee Revenue/Expense Projection

Name of Proposed Fee: _____

Department Name: _____ Proposed Fee Amount(s): _____

(Please attach additional sheet if more space is needed.)

Projections for one year

Revenue Projections		Proposed Fee (nearest whole \$)	# Individuals/term	# Terms/year	Estimated Revenue
1	Fee name:				\$
2	Fee name:				\$
3	Fee name:				\$
4	Fee name:				\$
5	Fee name:				\$
Subtotal, Estimated Revenue					\$

Expenditure Projections		Cost/item	Qty	Estimated Expense
1	Item:			\$
2	Item:			\$
3	Item:			\$
4	Item:			\$
5	Item:			\$
6	Item:			\$
7	Item:			\$
8	Item:			\$
9	Item:			\$
10	Item:			\$
Subtotal, Estimated Expenditures				\$

Net (Revenue Projections minus Expenditure Projections) \$

Average annual debt payments (if applicable) \$

Debt Coverage Ratio for funds with outstanding capital project loans \$
 (Net divided by average annual debt payments)