After completing the Miscellaneous Course Fee Request and the Trust Fund Information Fact Sheet submit the original documents, with appropriate signatures including Department Chair and College Dean on page 4 of the Miscellaneous Course Fee Request, to Academic Curriculum and Scheduling (Attention Kim Nicholl). Copies to the Associate Provost for Academic and International Programs and the Fee Advisory Committee will be made and distributed by Academic Curriculum and Scheduling

**Trust Fund Information Fact Sheet**

The Trust Fund Information Fact Sheet is a PDF located at:

<https://www.csusb.edu/sites/default/files/TrustFundFactSheet.pdf>

The Trust Fund Information Fact Sheet must be included in the Request for Miscellaneous Course Fees packet with all appropriate signatures. The approval signature of the Administration and Finance vice President is obtained by the General Accounting Office once the fee request has been approved. Additional information regarding Trust Funds can be located on the General Accounting web site <https://www.csusb.edu/accounting/general-accounting/trust-funds>

MEMORANDUM California State University, San Bernardino

 5500 University Parkway, San Bernardino, CA 92407

DATE:

TO: Associate Provost

 Academic and International Programs

FROM:

SUBJECT: MISCELLANEOUS COURSE FEE REQUEST

I am attaching the Miscellaneous Course Fee Request for:

I have read and understand the guidelines for establishing and maintaining a trust fund and have attached the completed Trust Fund Information Fact Sheet.

If this request is approved, I would like the fee(s) or fee adjustment effective:

Attachments: I. Miscellaneous Course Fee Request

#  II. Itemized List

1. Fee Compliance Certification
2. Trust Fund Information Fact Sheet

**Justification** (include a justification for the exceptional instructional materials, services or use of an off campus facility that necessitate this fee or fee adjustment). Be sure to address the following**:**

 a. The purpose of the fee (Is this fee for a new requirement or an existing requirement that has been funded by other means?);

 b. Why it should be charged or adjusted and the consequences of not doing so; and

 c. What other sources of revenue have been considered.

 **Attachment I**

### CALIFORNIA STATE UNIVERSITY, SAN BERNARDINO

Miscellaneous Course Fee Request

(Charge for exceptional materials, services, or use of an off-campus facility)

To be completed when requesting to initiate or change miscellaneous course fees and submitted along with the cover memo to the Associate Provost for Academic Programs through the Academic Scheduling Office

**Action Requested: Establish Delete Modify Current Fee Level - From: \_\_\_\_\_\_\_\_\_\_ To: \_\_\_\_\_\_\_\_\_\_**

 Effective

COURSE NUMBER: COURSE TITLE: Amount: Date:

Group of courses:

Students may be charged for exceptional materials, services, or use of off-campus facilities used in concert with the basic complement of supplies needed for state-supported instruction. These miscellaneous course fees should provide materials or services that have a tangible benefit to students.

Courses which involve miscellaneous course fees **must** be identified in the university Bulletin and the amount stated in the Schedule of Classes. Funds received from miscellaneous course fees must be deposited into campus local trust accounts and expended only for the purposes approved.

**I. Exceptional Instructional Materials and Services:**

1. The fee supplements the basic complement of classroom and laboratory instruction by providing exceptional instructional materials and services that would otherwise be unavailable to students, and which allow students to better meet the education objectives of the course(s) to which it applies.

**Does this fee meet this criterion? Yes No**

2. The fee can be no greater that the actual costs (may be calculated on a pro rata basis) of the materials or services involved.

**Does this fee meet this criterion? Yes No**

3. The exceptional materials or services for which the fee will be charged cannot be funded through marginal cost dollars, state university fee revenue, or permanent base budget allocations.

**Does this fee meet this criterion? Yes No**

##

## Fee Calculation:

for Section I based on annual cost (Complete Attachment II):

Item Current Cost**\*** Projected Cost

 (Academic Year)

 Year 1 Year 2

Exceptional Materials $ $ $

Services $ $ $

Off Campus use of facilities or equipment $ $ $

 1. Total Cost (expenditures) $ $ $

 2. # of Users per year

 3. Cost Per User $ $ $

 (Line 1 Divided by Line 2)

 4. Requested Fee Level $ $

 5. Current Fee Level $ $ $

 6. Increase or Decrease $ $

 7. Total Revenue from Fees $ $ $

 (Line 2 x Line 5) (Line 2 x line 4)

 8. Non Course Fee Revenue $ $ $

 to defray costs in line 1

 Explain sources of non-course fee revenue: . .

Explain sources of non course fee revenue\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **\***Use this column when there is an existing fee.

**Miscellaneous Course Fee Request (continued)**

NOTE: Complete Section II or III for FIELD TRIPS OR OFF CAMPUS FACILITIES/EQUIPMENT Fees

COURSE NUMBER: COURSE TITLE:

**II. Field Trips or Other Off-Campus Use of Facilities and Equipment:**

Students may be charged for certain costs involved with the conduct of field trips or other off-campus travel. The following are the only such costs that may be required of students:

A. Expenses incidental to field trips such as meals, lodging and other personal expenses.

B. Entrance fees to shows and exhibits, etc.

C. Actual or pro rata transportation costs, including a vehicle and/or equipment and materials used on the trip.

**Does this fee meet this criterion? Yes No**

**III. Use of non-state supported or off campus facilities and equipment:**

This charge is designed to apply particularly to courses with field trips or with instruction in non-state facilities.

 1. The charge must be associated with a course taught by a campus faculty member at a non-state supported or off-campus facility and/or utilizing rented equipment.

 2. The charge must not exceed **actual** costs of the students’ use of the facility or equipment but may be calculated on a pro rata basis. (Actual cost is defined as the fee charged to the campus.)

3. **No portion of the charge may be associated with costs of providing a qualified instructor for the course.**

**Does this fee meet these criteria? Yes No**

**FEE CALCULATION**:

for Section II or III above based on annual cost (Complete ATTACHMENT II):

Item Current Cost**\*** Projected Cost

 (Academic Year)

 Year 1 Year 2

Field Trip(s), Including Travel Costs $ $ $

Off-Campus Facilities Use $ $ $

Off Campus Equipment and Materials Use $ $ $

Other (specify) $ $ $

1. Total Cost (expenditures) $ $ $

2. # of Users per year

3. Cost Per User $ $ $

(Line 1 divided by Line 2)

4. Requested Fee Level $ $

5. Current Fee Level $ $ $

6. Increase or Decrease $ $

7. Total Revenue from Fees $ $ $

 (Line 2 times Line 5) (Line 2 times line 4)

8. Non Course Fee Revenue $ $ $

 to defray costs in line 1

Explain sources of non course fee revenue

**\***Use this column when there is an existing fee.

(Department Chair) (Date) (College Dean) (Date)

(Chair, Campus Fee Advisory Committee) (Date) (Associate Provost, Academic Programs) (Date)

(President) (Date)

 Approved by the Chancellor if required under E.O. 1102 (amounts greater than $150)

Attachment II

**ITEMIZED LIST**

1. List Exceptional Instructional Materials (general categories, including representative examples)

 Description Current Annual Cost Projected Annual Cost

 Academic Year:

 Year 1 Year 2

 Total: $ $ $

2. List Services (general categories, including representative examples)

 Description Current Annual Cost Projected Annual Cost

 Academic Year:

 Year 1 Year 2

 Total: $ $ $

3. List Off-Campus Facility, Equipment and Materials Use, including Field Trip Costs (general categories, including representative examples)

 Description Current Annual Cost Projected Annual Cost

 Academic Year:

 Year 1 Year 2

Total: $ $ $

Attachment III

**FEE COMPLIANCE CERTIFICATION**

**Miscellaneous Course Fee Policy (**[**EO 1102**](http://www.calstate.edu/eo/EO-1054.html))

**Policy Statement:** Miscellaneous course fees are defined as fees collected for materials, services or use of facilities used in concert with the basic complement of supplies needed for state-supported instruction. Miscellaneous course fees can only be charged for the actual cost of providing exceptional instructional materials, services or use of an off-campus facility. Students must have the option of attaining the materials or services required through alternative means; however, in cases where such alternative means are unavailable, students cannot opt out of utilizing the required material or service and must pay the miscellaneous course fee.

The following rules apply when determining if miscellaneous course fees can be charged for exceptional materials or services in the classroom:

1. Miscellaneous course fees can only be charged for the actual cost of the material, service or use of facility being provided.
2. A miscellaneous course fee ***cannot*** be charged for the basic complement of classroom supplies and materials required for instruction. These include but are not limited to: chalk, erasers, paper clips, pointers, classroom instructional equipment such as projectors (slide, overhead, computer, etc.) and associated supplies (bulbs, transparencies, software, etc.), or any other supplies deemed necessary to equip the instructional space for courses.
3. A miscellaneous course fee ***cannot*** be charged for the basic complement of laboratory supplies and instructional equipment necessary for classroom lab requirements identified in the course description. These include but are not limited to equipment, test tubes, work stations, computers or any supplies necessary to equip laboratory space to complement classroom course instruction.
4. Administrative charges and inflationary factors ***cannot*** be added to miscellaneous course fees. Only the actual cost of the material, service or use of a facility can be charged.
5. A miscellaneous course fee ***cannot*** be charged to fund the basic cost of instruction. Instructional costs are funded through marginal cost dollars, tuition fee revenue, and permanent base budget allocations.

**Approved Fee Ranges:**

|  |  |
| --- | --- |
| **$0-$150** | Fees that supplement the basic complement of classroom and laboratory instruction by providing materials and services that would otherwise be unavailable to students, and which allow students to meet the educational objectives of a given course.  |
| **$0-$3,000** | Fees for courses that require field trips or travel off-campus in order to meet the educational objectives of a given course. |

I have read the Miscellaneous Course Fee Policy, Attachment III of Executive Order 1102, and certify that the expenditures for this fee comply with this policy. The campus defines basic equipment and materials as those items which are essential to teach the course with an acceptable pedagogical content. Exceptional equipment and materials are those used to provide an enhanced educational experience beyond what can be provided through the basic complement of equipment and materials. Exceptional materials include those items of equipment and material that students can be reasonably expected to provide their own but which are provided to the students as a service because the University can procure them at a substantially lower cost.]

(Department Chair) (Date) (College Dean) (Date)