

UNIVERSITY OF MASSACHUSETTS

POLICY ON APPROVAL PROCESS FOR FEES RELATED TO TRUST FUNDS

This policy implements authority of the Board of Trustees under Chapter 75, Sections 1A and 11 as amended and Chapter 15A, Section 9i.

**DEFINITIONS AND APPROVAL AUTHORITY**

**Mandatory student charges** – include tuition and required fees charged to the typical full-time student for a full academic year. Required charges include all charges which are collected from such a large proportion of all students that the student who does not pay the charge is an exception. They do not include any charges that are clearly optional or one-time (see below). Examples of mandatory student charges include but are not limited to: tuition, the curriculum support fee, student activity fee, student health services fee, athletic fee, campus center fee, and infrastructure fee. With the exception of tuition and the curriculum support fee, these charges are typically the primary revenue source for the student fee based operations/trust funds. **The Board of Trustees must act upon the mandatory student charges annually and approves the establishment of new mandatory student charges.**

**Student Fee/Revenue Based Operations Charges** – These charges are the principal charges for **major auxiliary enterprise operations** or **major campus services** funded by student fees or auxiliary revenues. Major auxiliary enterprises are services external, but contributing to, the basic academic mission of the University such as: boarding and residence halls, and corporate and continuing education. The charges are typically non-mandatory or optional. Major campus services are services provided by the campus to major campus constituencies (example: Parking and Transportation). **The Board of Trustees approves the establishment of major student fee/revenue based operations charges. The Board of Trustees may delegate fee approval authority to the President.**

**Non-mandatory student fees** – include optional or one-time fees or surcharges charged students for specific services, or special academic program offerings and activities not required of the majority of students each year. Examples of non-mandatory student fees include but are not limited to: laboratory fees, international student exchange program fees, special academic program fees, identification card replacement fees. This group of charges also includes “pass through” or “agency” fees for contracted services such as accident insurance and supplemental health insurance. **The President approves non-mandatory student fee rates and the establishment of new non-mandatory fees. A schedule of all non-mandatory student fees shall be reported to the Board of Trustees annually.**

**Sales and Service and Administrative Charges** - These charges are for the sale or use of goods or services that are incidental to the conduct of instruction, research or public service or for administrative services. Examples include but are not limited to: film rentals, sales of scientific and literary publications, testing services, fees for the use of scientific equipment or laboratories, university presses, copy center charges, workshops and conference charges, data processing services, application or late payment fees, etc. **The authority to establish and set sales and service and administrative charges is delegated to the Chancellor. A schedule listing all major sales and service charges shall be reported to the President annually.**

The President shall annually review all mandatory, non-mandatory, student fee-supported auxiliary and revenue based operations charges.