

SANTA CRUZ: OFFICE OF THE CAMPUS PROVOST
AND EXECUTIVE VICE CHANCELLOR

March 17, 2021

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Dean, Jack Baskin School of Engineering

Subject: Changes in Course Fee policy effective academic year 2021-22

Dear Colleagues,

To relieve financial stress on our students due to COVID-19, we paused the charging of course materials fees and several other fees in academic year 2020-21. Academic departments have worked diligently this year to continue to acquire these materials and ship them to students taking remote instruction. This change was made financially possible by spending down accumulated course fee revenue balances and deploying CARES Act funds to fill funding gaps.

In the past month we have engaged in discussions regarding proposed changes to the course fee policy and rate-setting. I am writing to inform you of the resulting decisions made by me and Chancellor Larive.

Beginning Summer 2021, course fees will no longer be approved or charged for most courses. Instead, these costs will be augmented through a central allocation process described in Attachment 1. For academic years 2021-22 and beyond, only a limited range of courses will be eligible to charge course fees, subject to rate approval through the campus's annual process. The only eligible course fees will be in:

- for-credit FLD (primary field), LAB (primary lab), or STU (primary studio) courses, provided the course material costs or other costs eligible per course fee policy equal or exceed \$100 per student
- for-credit STI (independent studio) music lesson courses

This change to intentionally provide course materials to students for most courses, at no cost to them, is intended to reduce some barriers to degree completion and equalize opportunities for scholarly experience within a degree program.

Although it is the more expensive FLD, LAB, and STU and STI courses that could still charge course fees, this accounts for less than 1% of our course enrollments (2018-19 =.0054% or 1,565 of 285,396 enrollments). Students with financial need may qualify for additional financial aid to assist with these expenses. I recommend the existing practice in some departments of providing fee waivers continue, or preferably expand, as an alternative to financial aid.

Eliminating most course fees could also result in effort efficiencies spanning many academic and administrative units across campus. This includes business processes such as course fee packet preparation and submission, review, approval, course catalog/schedule editing, charging of fees, billing students, refunding students, financial aid coverage processes, etc.

With this change, departments and colleges are expected to continue to provide necessary course materials to students. We will all need to be careful to guard against gradual shifting with time of this financial burden to students, such as requesting students purchase materials on their own.

As you know, our CARES Act funds are expiring in a few months. Recently we were made aware of additional federal dollars our campus is eligible to receive later this year. Although information about the exact requirements and limitations of those funds are not yet available, at this time the general purpose appears to be similar in nature to the 2020 CARES Act. To the extent permissible, we will make a portion of those federal dollars available in 2021-22 to departments to purchase and ship course materials to students taking remote instruction in Spring 2021, Summer 2021, and Fall 2021.

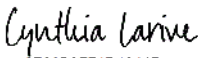
The course fee rate review and approval cycle is currently in progress. This process will be adjusted to accommodate this change. The annual approval letter of course rates will be forthcoming. Thank you for your cooperation in improving support of our students.

Sincerely,



Lori G. Kletzer
Campus Provost and Executive Vice Chancellor

Approved:

DocuSigned by:

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Cynthia Larive
Chancellor

Attachment

cc: Sarah Barron, Assistant Dean, Physical and Biological Sciences
Jennifer Baszile, Interim Vice Chancellor, Student Success
Amy Bruinooge, Assistant Dean, Humanities
Stephanie Casher, Assistant Dean, Graduate Studies Division

Theodore Coddington, Assistant Dean, Undergraduate Education
Anne Criss, Assistant Dean, Jack Baskin School of Engineering
Kyle Eischen, Assistant Dean, Social Sciences
Carrie Haber, Assistant Dean, Physical and Biological Sciences
Emily Johnson, Assistant Dean, Social Sciences
Biju Kamaleswaran, Associate Vice Chancellor & Campus Controller
Nicolle Laird, Assistant Dean, Physical and Biological Sciences
Sarah Latham, Vice Chancellor, Business and Administrative Services
Meg Lehr, Assistant Dean, Social Sciences
Herbert Lee, Vice Provost, Academic Affairs
Jim Moore, Assistant Dean, Graduate Division
Stephanie Moore, Assistant Dean, Arts
Emerson Murray, Director, Student Business Services
Monica Parikh, Director of Summer Session
Kimberly Register, Campus Budget Director, Planning & Budget
Patrick Register, Director, Financial Aid
Tchad Sanger, University Registrar
Lucy van Doorn, Sr. Budget Analyst, Chair MCFAC
Quentin Williams, Vice Provost and Dean, Graduate Division
Elani Zissimopoulos, Assistant Dean, Undergraduate Education

bc: Administrative Records

Cari Bettermann, Executive Assistant, Planning and Budget
Tracy Crick, Chief of Staff, Undergraduate Education
Pamela Dewey, Executive Assistant, Social Sciences
Matt Mullin, Executive Assistant, Arts
Judy Plummer, Executive Assistant, Humanities
Barbara Smee, Executive Assistant, Graduate Division
Scott Stalnaker, Executive Assistant, Physical and Biological Sciences
Lezlie Ward, Executive Assistant, Student Success
Stacy Wilson, Executive Assistant, Jack Baskin School of Engineering
Erika Wolford, Executive Assistant, Academic Affairs
Wendy Wurster, Executive Assistant, Business and Administrative Services

Attachment 1: Changes to Charging Course Fees Effective Summer 2021

As part of the decision to no longer charge students course fees for most courses, a funding methodology has been developing by which central funds will be provided to academic disciplinary divisions and to Undergraduate Education for the colleges, in the form of funding envelopes (a.k.a. lump sums).

Funding envelopes will be calculated based on third-week enrollment in credit-bearing courses each term, including summer, using the following rates per enrolled student:

FLD	\$15
LAB in PB Sci	\$22
LAB in all other divisions	\$8
STU	\$22

In the first year, this calculation should provide a total amount for each division that is similar to the course fee revenue previously generated (pre-COVID). The funding envelopes will, of course, vary annually based on courses offered.

Divisions will determine appropriate portions to allocate for relevant courses, regardless of course type (LEC, LAB, FLD, SEM, etc.). These funds may only be used for course materials and other types of course support expenses consistent with allowable costs per the course fee policy. These funds may not be used for other types of expenses such as salary and benefits.

To assist divisions in monitoring spending and facilitate rate analysis by the Budget Office, a new unique fund code has been established. Fund 20080 will be used for the course materials budget allocations and for spending. This fund is sourced from tuition revenue.

Budget Office staff will review the allocation rates each year to determine whether adjustment is warranted, considering inflation and utilization of funds.