

Guidelines for  
Establishing, Increasing, Reducing, or Eliminating  
Campus-based Fees

University of California, Merced

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### Authority

University of California student fees are governed by a number of Regental, Office of the President and campus policies. These implementing guidelines are intended to amplify, clarify and augment the policies only pertaining to campus-based student fee referenda.

All student referenda results are advisory to the Chancellor and, conditional on the Chancellor's recommendation and approval, are subject to final approval by the UC President under the authority delegated to the UC President by The Regents. **The authority for charging student fees is vested in The Regents, who, in Section 100.4(g) of the Standing Orders of the Regents, delegate certain authority to the President.**<sup>1</sup>

### Increasing, Eliminating or Reducing Student Referenda Fees

Fees approved through the student fee referenda process cannot be increased without an affirming referendum unless an increase was written into the original referendum. Such fees may be eliminated or reduced by passage of a subsequent referendum as long as no debt is outstanding on the program or service funded by the fee, or may be eliminated or reduced by the Chancellor without a referendum when:

- A fee a program or service supported by the fee either is not undertaken or has been reduced or eliminated, or
- a lower fee has been demonstrated to be sufficient to sustain the initial purpose of assessing the fee (for instance, when the debt service on construction bonds is lower than anticipated at the time the fee was approved).

### Origins of Campus-Based Student Fee Referenda

UC Merced campus-based student fee referenda may be initiated by: 1) students or student organizations through the ASUCM (Associated Students of the University of California, Merced)/GSA (Graduate Student Association) or its election practices, or 2) a campus unit through campus executive management approval. These guidelines govern the process to ensure that referenda that make it to the ballot to be voted on by students can be implemented by campus. These guidelines take into account ASUCM/GSA election policies and timing. It is particularly important to adhere to the provisions concerning ballot content, clarity of language, adherence to campus and University policies, and voter information and education. These guidelines apply only to campus-based

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<sup>1</sup> See Standing Order 100.4, "Duties of the President of the University", section (g): <http://regents.universityofcalifornia.edu/bylaws/so1004.html> and Sections 80.00 – 87.00 of the University of California's Policies Applying to Campus Activities, Organizations, and Students: <http://policy.ucop.edu/doc/2710517>

compulsory student fees. They do not apply to University-wide fees, fees related to instruction, course materials fees, or other fees requiring President's approval, or campus-based miscellaneous fees (e.g., user fees) requiring Chancellor's approval.

### **Student Fee Referenda Committee**

The Vice Chancellor for Student Affairs, on behalf of the Chancellor, will appoint members to the Referenda Fee Committee (RFC) to oversee the student fee referendum process. The RFC advises on the development and implementation of fee referenda initiatives, provides guidance on adherence to Campus and University policies, makes recommendations to the Chancellor on whether a referendum is ready to go to a vote, on pros and cons of the proposal and, following a vote, on the election results. RFC membership includes a majority representation of students, with representatives from a variety of stakeholders such as the Associated Students of UC Merced (ASUCM), Graduate Student Association (GSA), and Student Fee Advisory Committee.

*The Student Fee Referendum Committee (RFC) includes representation from:*

- Associated Students of UC Merced (ASUCM): 3 representatives (Election Commissioner and 2 representatives appointed by the current ASUCM President)
- Graduate Student Association (GSA): 1 representative
- Student Fee Advisory Committee: 1 student representative (Student Chair or Designee)
- 1 additional UC Merced student
- Associate Vice Chancellor and Dean of Students
- 1 Representative from Financial Aid/Students First Center
- 1 Representative from Faculty Senate
- Director of Student Involvement

Additional members may be added as appropriate, such as a representative from Physical Planning, Design, and Construction when the referendum involves the construction of a building. The students will select the RFC Chair.

*Conflict of interest:* In the event a RFC committee member is in a department, administrative unit, or organization that will benefit from a proposed referendum, the committee member shall recuse herself/himself from the committee until after the election is held.

*Responsibilities of the Student Fee Referendum Committee (RFC):*

The duties of the RFC are as follows:

- Provide guidance on adherence to Campus and University policies and practices as they relate to student fee referenda;
- Advise all sponsors of referenda (students, the ASUCM, the GSA, and campus departments) on the development and implementation of fee language and election procedures;
- Identify appropriate campus resources for additional consultation;
- Before a student-initiated fee referendum is placed on the ASUCM/GSA ballot, determine whether the referendum is in accordance with UC policy and inform the sponsor, the ASUCM/GSA and other

community stakeholders (as deemed appropriate by the committee) if implementation of the fee would be prohibited; and

- For department-initiated referenda, serve as a resource for the Election Commissioner; assist in determining a timeline leading up to the election; approve the election dates; hear appeals on actions taken by the Election Commissioner and render final decisions.

*Quorum:* A simple majority (50% plus one) of the RFC voting membership will constitute a quorum for issues requiring a vote of the committee.

## REFERENDUM PROCESS

### Goals

The goals that guide the referendum process are:

- To ensure compliance with Campus and University policies;
- To foster the widest possible discussion and debate in an effort to create a well-informed voting population;
- To achieve the broadest possible consultation among both students and the appropriate campus units during all phases of planning and implementation of student fee referenda; and
- To ensure that fees approved by students are in accordance with policy and are implementable.
- To ensure the conduct of the referendum election shall conform to principles of democracy and fairness. All participants, whether on advisory committees, in student government, in the sponsoring unit, on election campaign groups, or otherwise involved, shall abide by these principles. These principles include the right of voter access to complete and accurate information; referendum opposition's right of access to the voting community for their campaign; guaranteed anonymity of each person's vote; honest campaigning free of intimidation, threats, or pressure; equal opportunity for all to cast their ballots; and a complaint/grievance process with swift and impartial response.

### Compulsory Campus-Based Fees Requiring Referendum

Both before and during the process, campus departments or organizations planning to establish a compulsory campus-based fee must consult with the RFC in a timely manner to ensure that the proposed fee complies with current policies and guidelines. The RFC will provide guidance on adherence to Campus and University policies, have final authority on ballot wording, set the election dates, assist in determining a timeline leading up to the election, and identify appropriate campus resources for additional consultation.

- a. ASUCM and GSA fee initiatives must also be developed in consultation with the RFC. The committee will work with the ASUCM or the GSA to develop a proposal and language that complies with campus and University policies and that contains unambiguous implementation guidelines if the referendum is approved.

- b. Student fee elections initiated by campus departments typically will be held during the fall semester, and ASUCM and GSA fee elections will typically be held in the spring. Factors considered in determining election dates include schedules for billing, UCOP review, and other campus election timelines.
  - c. For planning purposes, it should be kept in mind that fee implementation will take one year under normal circumstances. For example, a fee referendum that is passed in a fall election and receives Chancellor and Presidential approval will be first assessed the following fall semester.
2. As part of the consultation process with RFC, the department or organization sponsoring the fee initiative must prepare a written draft fee proposal that identifies the purpose and duration of the fee. The department will present the draft to consulting units and student groups for input. If a student or student group intends to submit a referendum proposal on behalf of a department/unit, students must receive written approval from the department/unit lead.
  3. Based upon adherence to UCOP policies and UC Merced guidelines governing campus-based fees, the RFC will seek approval of the Chancellor to conduct a fee referendum.
  4. UCOP allows campuses to collect money for need-based financial aid in order to promote access for students who without such assistance would be unable to obtain an education at the University of California. The Merced campus applies the University of California return-to-aid standard to new or increased mandatory campus-based fees. Based on the current standard, the return-to-aid percentage on a proposed mandatory campus-based fee should be calculated at one-quarter of the total fee.
  5. If at least 20% of currently registered students vote and over half the students that vote approve the fee referendum, the RFC will submit the fee recommendation to the Chancellor through the Associate Vice Chancellor for Student Affairs and the RFC Chair. If the Chancellor approves sending it forward, the Associate Vice Chancellor for Student Referenda will draft a memo to the University of California, Office of the President for final approval to assess the fee.
  6. The Student Fee Advisory Committee will advise on the implementation and use of the fee.
  7. The department must coordinate with appropriate campus units to determine the criteria, if any, for refunds of the fee.

*Compulsory Campus-Based Fees Not Requiring Referenda*

1. As allowed under Section 83.00 of the University of California's Policies on Compulsory Campus-based Fees, compulsory campus-based fees may be increased by the Chancellor without referendum when under the following circumstances:
  - a. It is necessary for the health and safety of students (e.g. seismic risk).
  - b. It is necessary to meet legal or contractual obligations.

- c. The original referendum document specifies it is permissible to do so.

In these circumstances, the Chancellor may ask for an advisory referendum as appropriate.

2. A compulsory campus-based fee may be eliminated or reduced by the Chancellor without a referendum when:
  - a. A program supported by the fee is eliminated.
  - b. A lower fee has been demonstrated to be sufficient to sustain the initial purpose of assessing the fee.

### Voluntary Campus-Based Fees

Section 90.00 of the University of California's Policy on Voluntary Student Contributions allows Chancellors to establish procedures permitting the use of the registration process or other means to collect voluntary fees from students in support of registered campus organizations.

1. Recognized campus organizations that seek to establish a voluntary campus-based fee must consult with the RFC. Recognized campus organizations include registered, sponsored and affiliated groups. The recognized campus organization must serve the interests of students enrolled at the University.
2. The organization must follow the same guidelines as if establishing a compulsory campus fee, with the following exceptions:
  - a. A Return-To-Aid allocation is not required.
  - b. Final approval from The Regents is not required.
3. If at least 20% of currently registered students vote and over half the students that vote approve the fee referendum, the RFC will submit the fee recommendation to the Chancellor for approval.
4. The RFC will work with the registered campus organization and appropriate campus units on the process to collect the fee and ensure that students are only assessed the fee by means of a positive check-off to pay the fee. All collection costs will be borne by the recognized campus organization.
5. Collection of the voluntary campus-based fee does not constitute University sponsorship or endorsement of the recognized campus organization.
6. A voluntary campus-based fee may be eliminated or reduced by the Chancellor or his designee when any of the following apply:
  - a. The purpose of collecting the fee is no longer valid (e.g. a program supported by the fee is eliminated).
  - b. The benefiting recognized campus organization requests discontinuation of the fee.

### Student-Initiated Fee Referendum Timeline

All deadlines below are strongly recommended. This timeline does NOT reflect all the steps in the referendum process. Please refer to the Campus Guidelines and the ASUCM/GSA Election Bylaws<sup>2</sup> or GSA Bylaws<sup>3</sup> for more detail.

<b>FALL SEMESTER</b>	
Sponsors establish plan for student representation	Once decision is made to pursue referendum. If the referendum proposal is on behalf of a department/unit, student/ student group must receive and provide written approval from the department/unit lead.
Sponsors draft Fee Referendum Proposal outline and receive consultation from ASUCM/GSA	By November 1
Sponsors receive concept approval from ASUCM/GSA	No later than November 15
Sponsors begin communication with RFC	By November 15 - 20
Sponsors submit concept approved Fee Referendum Proposal to RFC for feedback	By November 20 – December 2
Budget Office forwards final draft of Fee Referendum Proposal to campus Chancellor, legal counsel, and OP for feedback	Upon receipt of final draft of Fee Referendum Proposal (No later than December 6)
<b>SPRING SEMESTER</b>	
RFC vets feedback from campus legal counsel and OP	By February 1
Sponsors finalize Fee Referendum Proposal with guidance from RFC	By February 15
Sponsors begin hard marketing campaign	After February 15
ASUCM Senate/GSA Executive Council votes whether to put referendum on ballot	Before end of candidate filing period
ASUCM/GSA Elections	Mid to Late April
CFO final-sign off	Early May
Chancellor approval	Mid May

<sup>2</sup>ASUCM Elections Bylaws <https://ucmerced.app.box.com/file/109949616989>

<sup>3</sup> GSA Bylaws [http://gsa.ucmerced.edu/sites/gsa.ucmerced.edu/files/documents/gsa\\_by-laws\\_2016.pdf](http://gsa.ucmerced.edu/sites/gsa.ucmerced.edu/files/documents/gsa_by-laws_2016.pdf)

### Department-Initiated Fee Referendum Timeline

Deadlines for items in **BOLD** are required per the Campus Guidelines, other deadlines are recommended. This timeline does NOT reflect all the steps in the referendum process. Please refer to the guidelines for more detail.

FALL SEMESTER	
Sponsors establish plan for student representation	Once decision is made to pursue referendum
Sponsors begin communication with/receive consultation from RFC	October 1 - 31
<b>Sponsors submit initial draft of Fee Referendum Proposal to RFC</b>	<b>November 1 - 19</b>
Sponsors submit final draft of fee Referendum Proposal to RFC based on initial feedback	November 20 – December 2
RFC Committee votes on Fee Referendum Proposals to move forward	December 2 - 5
Budget Office forwards final draft of Fee Referendum Proposal to campus Chancellor, legal counsel, and OP for feedback	Upon receipt of final draft of Fee Referendum Proposal (No later than December 6)
SPRING SEMESTER	
RFC vets feedback from campus legal counsel and OP	By February 1
<b>Sponsors finalize Fee Referendum Proposal with guidance from RFC</b>	By February 15
Sponsors begin hard marketing campaign	After February 15
<b>Elections</b>	<b>Mid to Late April</b>
CFO final-sign off	Early May
Chancellor Approval	Mid May

### REFERENDUM GUIDELINES

#### A. Referendum Approval

In order for any fee referendum to pass, unless otherwise determined by the Chancellor prior to the election, a minimum of 20% of the eligible population (based on the campus' official enrollment statistics as of the third week of classes) must vote in the election, and a simple majority (50%+1) of those voting must approve the proposed fee. The population eligible to vote is determined to be those students who belong to the segment of the population (e.g. undergraduate and/or graduate) that would be required to pay the fee.

#### B. Sponsoring Unit Participation



The department or organization sponsoring the fee initiative may be involved in drafting the language of the ballot and in organizing and implementing the campaign in favor of a referendum but may not be involved in running the election.

### **C. Campaigning**

The RFC, in conjunction with the Elections Commissioner from the ASUCM/GSA Elections Commission, will determine time, place, and protocol for the publicity of campaigns in favor of and against the proposed fee initiative to ensure that there is opportunity for all sides to comment and that full and complete information on the referendum is provided to students.

### **D. Election Management and Implementation**

An Elections Commissioner from the Elections Commission will be appointed to conduct, monitor, and verify the election.

1. The Elections Commissioner is responsible for:
  - a. Recruiting, training, and supervising needed staff.
  - b. Developing and managing the election budget.
  - c. Verifying election results and forwarding them to the Associate Vice Chancellor for Student Affairs.
  - d. Coordinating dissemination of the results.
  - e. Monitoring compliance with pertinent campus regulations.
  - f. Responding to problems and complaints.
  - g. Developing an information system to support the election (such as election information sites and the online election website) and producing related material.
  - h. Coordinating other miscellaneous duties with the RFC and campus units (such as Information Technology).
  - i. Providing ongoing consultation to sponsoring organizations and others with questions about student fee referenda.
2. The Elections Commissioner has the authority:
  - a. To determine contents of online election website and content and dissemination of all information available at the election information sites.
  - b. To resolve complaints or refer complaints to others for resolution.
  - c. To verify the election results.
3. Student input should be actively sought during election planning.
4. The following guidelines apply specifically to online fee elections:

- a. Following the end of voting, the Elections Commissioner, RFC Chair(s), and student representatives will meet to receive the election results.
- b. If there is a significant system breakdown, the election may be extended for the same duration of time as the breakdown as decided by the Election Commissioner in consultation with the RFC Co-Chairs.
- c. When a new campus computer program is created for online elections, it is recommended that prior to the election an objective third party review the system to verify that the system is operating as designed.

## **E. Voting**

1. Ballot questions appear on the ballot based upon constitution or election guidelines established by the ASUCM or the GSA.
2. Electronic ballots are used (e.g. online voting), the ASUCM/GSA Elections Commission or the Graduate Student Association will designate procedures.

## **F. Election**

Funding Election costs will be borne by the department or organization sponsoring the fee initiative. This includes but is not limited to equipment rental and computer programming and content specific to the election, if online.

## **G. Reporting of Results**

The Student Fee Referenda Committee will report fee election results to the Chancellor.

## **H. Complaint Resolution**

The Student Fee Referenda Committee will report fee election results to the Chancellor. H. Complaint Resolution

1. Complaints concerning the election process (as opposed to technical problems) should be directed in writing to the Election Commissioner. Efforts should be made during the campaign and election periods to inform students about the complaint resolution process. Complaints could include, for example, observations of non-compliance with campus regulations or election guidelines, perceived irregularities in voting, lack of sufficient information concerning the referendum or the voting process, and Irregularities in ballot tallying.
2. The Election Commissioner has the authority to resolve all complaints or to refer them to the Student Fee Referenda Committee or other party for resolution. Any action taken by the Election Commissioner may be appealed to the ASUCM/GSA Judicial Board for final resolution.

3. Complaints must be submitted within one calendar week of the last day of the election and will receive a timely response. Complaints submitted after that will not be considered.

## **ADDENDUM A**

### **UC Merced Guidelines for Campus Based Fee Referenda Student-Initiated Fee Referendum Proposal Outline**

A student-initiated Fee Referendum Proposal is a working document that ultimately results in the complete referendum text and ballot language.

As the campus committee whose purpose is to develop and recommend to the Chancellor for approval policies, procedures, and criteria for campus-based student fee referenda, the RFC is the body that will advise you (the sponsor) on the development and implementation of fee language and election procedures. The RFC will also make a determination whether or not proposed fee referenda are in accordance with UC policy and will inform you, the ASUCM/GSA, and other community stakeholders if implementation of the fee would be unviable. Student initiated referenda must fulfill the ASUCM/GSA requirements to be included in an ASUCM/GSA election. It is advisable for students or the student group to consult with the ASUCM/GSA no later than November 1<sup>st</sup> and submit concept approved proposal to RFC no later than November 20<sup>th</sup> for an election to be held no earlier than the following April.

Students should submit an initial draft of their Fee Referendum Proposal to the RFC by November 15<sup>th</sup> for an election to be held no earlier than the following April. Proposals initially submitted after November 20<sup>th</sup> will most likely not be endorsed by the RFC. If a student or student group intends to submit a referendum proposal on behalf of a department/unit, students must receive written approval from the department/unit lead.

New fees cannot begin in the summer term but may begin in either Fall or Spring semesters.

Because a Fee Referendum Proposal is a working document, ASUCM/GSA and the RFC will work with you to develop the areas of your proposal throughout the consulting process. You may also be asked by the RFC to share your proposal with units who may be impacted by the fee and/or student groups for input.

A student-initiated Fee Referendum Proposal follows the outline presented below. In all sections of the fee proposal it is important for the language to be clear and precise, so students have unambiguous information upon which to vote.

#### **I. Referendum Title**

The title of the referendum should be neutral, that is it should simply state either the name of the benefitting unit or the service to be provided. It should not contain value-laden phrases such as “Save Our ...” or “Avert Disaster...” or “Stick it to...”.

#### **II. Complete Text of the Referendum**

This section is an expansion of the ballot language in order to provide additional information to the student voter.

**III. Introductory Statement**

Provide in one paragraph a description of the proposed uses of the fee and identifying any campus unit(s) that would be involved in delivering benefits or services to students arising from the fee.

**IV. Background**

Provide an explanation of why the fee is needed, why it is needed at this time, what alternatives to a fee have been explored, and why these alternatives are not feasible or are less satisfactory than a fee.

Explain in value-neutral language what the consequences will be if the fee is not approved. Save the emotion-laden language for the marketing and informational campaign.

What role have students played in the demand for the services or benefits, in the review of funding alternatives, and in development of the parameters or proposed uses of the fee?

If similar fees are in effect on other UC campuses, provide information on those fee amounts and uses.

**V. Purpose of the Fee**

Elaborate on what new or expanded services or benefits to students will be provided by the fee if it is approved.

**VI. Breakdown of the Fee**

This section should contain:

- A statement identifying which students will be expected to pay this fee (undergraduates, graduates, both) and whether the fee will apply to summer students.
- Specifics on the fee duration and fee levels.
  - Be specific about when the fee would first be collected (for instance, Fall 2020 semester) and when it will end (for instance, Spring 2031 semester).
  - Fee amounts per semester and per summer session, if applicable, should be rounded to whole numbers.
  - If the amount is expected to increase during the existence of the fee, specify the amounts on a year-by-year schedule and explain how they have been calculated. The easiest way to display this information is to use a table similar to the following:

		Yr. 1 Per	Yr. 2 Per	Yr. 3 Per	Yr. 4 Per	Yr. 5 Per	Yr. 6 Per	Yr. 7 Per	Yr. 8 Per	Yr. 9 Per	Yr.10 Per
	% of fee	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt
Campus Unit	75%	7.50	7.50	8.25	8.25	9.00	9.00	9.75	9.75	10.50	10.50
Financial Aid	25%	2.50	2.50	2.75	2.75	3.00	3.00	3.25	3.25	3.50	3.50
Total Fee	100%	10.00	10.00	11.00	11.00	12.00	12.00	13.00	13.00	14.00	14.00

- If the increases are tied to an inflation index and the future amounts are not known at the time of the election, define the index and whether the index poses a maximum increase level (in which case, identify who will be deciding on the amount of the increase) or whether the fee will be automatically increased in line with changes in the index.
- Unless stated otherwise in the original authorizing referendum, the amount of all fees that are tied to indices must be communicated to the Campus Budget Office, Financial Aid Office, Graduate Division, Office of the Registrar and Summer Session by January 15 to be effective the following summer or Fall term.
- Indicate what percentage and amount of the fee will be used for financial aid and estimate what portions of the fee will go to campus units and/or third party service providers.
- Indicate whether or not the fee will apply to summer students and the rationale for charging the fee to those students.
- If the fee will apply to summer students in an amount different than the semester amount specify the amount of the summer fee.
- Identify what student advisory group will be overseeing the use of the fee.

### **VII. Oversight of the Fee**

Identify the composition of the student advisory committee for the fee, and what role it will play in decision-making on the uses of the fee, how frequently it will meet, whether the committee will include non-student members, and any other information about the manner in which oversight will be provided.

### **VIII. Ballot Language**

This section should state the referendum language that will appear on the ballot using the following format (also refer to the ASUCM/GSA Election Bylaws for ballot language requirements):

“The following language will be placed on the Spring 2\_\_\_\_ ASUCM/GSA ballot for a vote of the student body:

Sentence 1: Include the purpose of the fee, when it will start and end, the amount of the fee per semester, whether it will increase over time, whether it applies to all students or only graduates or undergraduates, whether it applies to summer students, and the return-to-aid.

Sentence 2: Do you approve this fee?”

## **ADDENDUM B**

### **UC Merced Guidelines for Campus-Based Student Fee Referenda**

#### **Department-Initiated Fee Referendum Proposal Outline**

A department-initiated Fee Referendum Proposal is a working document that ultimately results in the complete referendum text, the ballot language, and the marketing plan and its budget.

As the campus committee whose purpose is to develop and recommend to the Chancellor for approval policies, procedures, and criteria for campus-based student fee referenda, the RFC is the body that will advise you (the sponsor) on the development and implementation of fee language and election procedures. The RFC will also make a determination whether or not proposed fee referenda are in accordance with UC policy and will inform you, the ASUCM/GSA, and other community stakeholders if implementation of the fee would be unviable.

Campus departments sponsoring referenda must submit the initial draft of their Fee Referendum Proposal to the RFC by November 19<sup>th</sup> for an election to be held no earlier than the following April. Proposals initially submitted after November 20<sup>th</sup> will most likely not be endorsed by the RFC.

New fees cannot begin in the summer term but may begin in either Fall or Spring semesters.

Because a Fee Referendum Proposal is a working document, the RFC will work with you to develop the areas of your proposal throughout the consulting process. You may also be asked by the RFC to share your proposal with units who may be impacted by the fee and/or student groups for input. A department-initiated Fee Referendum Proposal follows the outline presented below. In all sections of the fee proposal it is important for the language to be clear and precise, so students have unambiguous information upon which to vote.

#### **I. Referendum Title**

The title of the referendum should be neutral, that is it should simply state either the name of the benefitting unit or the service to be provided. It should not contain value-laden phrases such as “Save Our ...” or “Avert Disaster...” or “Stick it to...”.

#### **II. Ballot Language**

This section is the language that will appear on the election’s website voting screen. The student will register his or her vote on this web page. Therefore, the ballot language should be completely viewable on one screen, without the need to scroll down. This section should contain:

- A brief (2-3 sentences) description of the purpose of the referendum and the identity of the sponsoring unit and any campus unit(s) that would be involved in delivering to students the benefits or services arising from the fee.
- A brief description (2-3 sentences) of why the fee is needed and why it is needed

at this time. Include the proposed uses of the fee revenue.

- A statement identifying which students will be expected to pay this fee (undergraduates, graduates, both) and whether the fee will apply to summer students.
- Specifics on the fee duration and fee levels.
  - Be specific about when the fee would first be collected (for instance, Fall 2013 semester) and when it will end (for instance, Spring 2024 semester).
  - Fee amounts per semester and per summer session, if applicable, should be round to whole numbers.
  - If the amount is expected to increase during the existence of the fee, specify the amounts on a year-by-year schedule and explain how they have been calculated. The easiest way to display this information is to use a table similar to the following:

		Yr. 1 Per	Yr. 2 Per	Yr. 3 Per	Yr. 4 Per	Yr. 5 Per	Yr. 6 Per	Yr. 7 Per	Yr. 8 Per	Yr. 9 Per	Yr.10 Per
	% of fee	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt	Sem amt
Campus Unit	75%	7.50	7.50	8.25	8.25	9.00	9.00	9.75	9.75	10.50	10.50
Financial Aid	25%	2.50	2.50	2.75	2.75	3.00	3.00	3.25	3.25	3.50	3.50
Total Fee	100%	10.00	10.00	11.00	11.00	12.00	12.00	13.00	13.00	14.00	14.00

- If the increases are tied to an inflation index and the future amounts are not known at the time of the election, define the index and whether the index poses a maximum increase level (in which case, identify who will be deciding on the amount of the increase) or whether the fee will be automatically increased in line with changes in the index.
- Unless stated otherwise in the original authorizing referendum, the amount of all fees that are tied to indices must be communicated to the Campus Budget Office, Financial Aid Office, Graduate Division, Office of the Registrar and Summer Session by January 15 to be effective the following summer or Fall term.
- Indicate what percentage and amount of the fee will be used for financial aid and estimate what portions of the fee will go to campus units and/or third-party service providers.
- Indicate whether or not the fee will apply to summer students and the rationale for charging the fee to those students.
- If the fee will apply to summer students in an amount different than the semester amount specify the amount of the summer fee.
- Identify what student advisory group will be overseeing the use of the fee.
- This information should be followed by the following statement:

“Do you approve this mandatory fee to support \_\_\_\_\_?”

\_\_\_\_\_ Yes

\_\_\_\_\_ No

### III. Complete Text of the Referendum

This section is an expansion of the ballot language in order to provide additional information to the student voter.

#### **IV. Introductory Statement**

Provide in one paragraph a description of the proposed uses of the fee and identifying the sponsoring unit and any campus unit(s) that would be involved in delivering to students the benefits or services arising from the fee.

#### **V. Background**

Provide an explanation of why the fee is needed, why it is needed at this time, what alternatives to a fee have been explored, and why these alternatives are not feasible or are less satisfactory than a fee.

Explain in value-neutral language what the consequences will be if the fee is not approved. Save the emotion-laden language for the marketing and informational campaign.

What role have students played in the demand for the services or benefits, in the review of funding alternatives, and in development of the parameters or proposed uses of the fee?

If similar fees are in effect on other UC campuses, provide information on those fee amounts and uses.

#### **VI. Purpose of the Fee**

Elaborate on what new or expanded services or benefits to students will be provided by the fee if it is approved.

#### **VII. Breakdown of the Fee**

Follow the directions given above under the ballot language section concerning the duration of the fee, the amount of the fee, what groups of students will be subject to the fee, whether the fee applies to summer students, whether the fee will increase over time and by how much, what is the percentage and amount of the return to financial aid and what portions of the fee will go to campus units and/or third-party service providers.

#### **VIII. Oversight of the Fee**

Identify the composition of the student advisory committee for the fee, and what role it will play in decision-making on the uses of the fee, how frequently it will meet, whether the committee will include non-student members, and any other information about the manner in which oversight will be provided.



**ADDENDUM C**  
UC Merced Guidelines for Campus-Based Student Fee Referenda  
**Annual Report Outline**

Throughout the duration of a student referendum fee, campus units receiving fee revenue are required to report annually on the use of fees through a report submitted after fiscal close each year to the RFC. Information from this report will be included in the annual report that RFC submits to the Chancellor.

The Annual Report provides accurate and detailed information on the following:

1. Name and Title of person completing the report and the role they play in regard to the oversight of the fee.
2. List the total revenues collected during the year and how they were expended.
3. If there are any remaining balances, explain what the plans are for expending the balances.
4. If the activities funded by the fee have changed from those defined in the referendum, explain why.
5. Identify the advisory committee members and the constituencies they represent.
6. Indicate how frequently the advisory group met during the year and what key issues were discussed.
7. Explain whether the intended goals of the fee have been accomplished. If they have not been accomplished, explain why.

Please submit your completed report electronically to the co-chairs of the RFC who will make it available to appropriate offices.