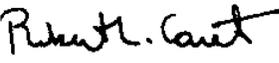




Office of the President • One Washington Square • San José, California 95192-0002 • 408/924-1177

October 23, 1996

PD 96-03

MEMO TO: Campus Community
FROM: Robert L. Caret 
President
SUBJECT: Presidential Directive 96-03

Campus Fee Advisory Committee

In accordance with the resolution passed by the CSU Board of Trustees May, 1996, and executive Order 661 issued by the Chancellor on August 23, 1996, I am hereby establishing the Campus Fee Advisory Committee (CFAC) for San José State University. This committee will provide advice to the president prior to any adjustments of a campus-based mandatory, user, or penalty fee, and before requesting the chancellor to establish a new fee.

Membership --The Committee shall be composed of eleven members:

- The Associated Students President or designee
- Five students selected by the Associated Students in accordance with normally established procedures
- The Academic Senate Chair or designee
- One Faculty member appointed by the President, after consultation with the Executive Committee of the Academic Senate
- One representative from the Provost's division appointed by the President
- One representative from the Vice President for Administration's division appointed by the President
- One representative from the Vice President for Student Affairs' division appointed by the President

Chair:

- One year term, with full voting rights
- Appointed from the membership by the President
- Reappointments are permitted

Term:

- Membership of the CFAC will serve one year terms, from July 1 to June 30
- Reappointments are permitted

Meetings:

The committee shall meet at least once a semester, and may be asked to meet during academic breaks, if necessary.

Quorum:

At least a majority of the total membership, including the chair, shall constitute a quorum. Vacant seats shall not be included in determining a quorum.

Referendum Procedures:

The committee shall establish referendum policies and procedures that will address the manner in which referenda will be conducted by the CFAC. Referenda may be called by the CFAC upon its own initiative, upon the recommendation of the Associated Students, or upon the recommendation of other entities

on campus. Such procedures and policies shall be in accordance with any guidelines developed by the California State University, and must be approved by the President. When appropriate and feasible, CFAC and the Associated Students should work cooperatively to use the regular election format of the Associated Students, with the costs shared on a pro rata basis.

Fee Review:

One of the purposes of the CFAC is ongoing evaluation of the campus fee structure, including determining whether fees can be eliminated or consolidated, and to make appropriate recommendations to the campus president. The committee may undertake its own reviews, or may request offices on the campus to provide information, including recommendations regarding elimination, augmentation, and consolidation of fees, that then may be forwarded to the president.

Financial Aid:

The CFAC shall develop procedures to assure that any additional student need resulting from increases in campus mandatory fees, or the establishment of new mandatory fees, will be covered adequately by increased financial aid from campus funding sources.

Fee Accountability Report:

An annual report detailing all of the activities of CFAC shall be provided to the president by July 1 each year. This report may be used in developing the campus' portion of the annual report to the CSU Board of Trustees.

Staffing:

Staffing shall be provided by the Office of the Vice President for Administration, including arranging the financing of all student advisory referenda recommended and sponsored by the CFAC, and approved by the President.

Other Fee Committees:

Any fee committees that have been established on this campus prior to this directive and E.O. 661 will continue to exist.

The Student Health Advisory Committee shall continue to function under Executive Order 637 as an advisory body to the Student Health Service and the President, except that any recommendations regarding health service fees shall be presented to the CFAC for its action.

The Instructionally Related Activities Fee Committee shall continue to function under the general provisions of the superseded E.O. 429 as the recommending body for the disbursement of IRA funds. Although the IRA Committee will no longer have the authority to conduct its own fee referenda, it may make recommendations to the CFAC for such actions.

In addition to its normal role in campus shared governance, the Academic Senate Budget Advisory Committee may serve as a means of continuing consultation for the CFAC.

Review:

The provisions and procedures of this directive will be reviewed at the end of a representative period, in order to seek recommendations for appropriate revisions, if necessary.

RLC:ms

Attachments: CSU Summary
Executive Order 661
Fee Policy Authority
Misc. Information

SYSTEM POLICY SUMMARY:

- 1 Establishment of a campus fee advisory committee for mandatory fee changes;
- 2 Development of student fee referendum procedures;
- 3 Establishment of local (campus?) financial aid programs;
- 4 Review existing fees by campus president (elimination/consolidation);
- 5 Review Standing Orders of the Board of Trustees to incorporate the new fee framework and delegate authority to establish and adjust fees;
- 6 Establish an Ad Hoc system wide committee comprised of reps from the California State Student Association, the Academic Senate and the campuses to develop student fee referendum guidelines for publication in Title 5;
- 7 Distribute draft outline of fee accountability report for review and comment (fee report Information sent to carries in March 1997 for budget presentation in September 1997).

KEY POINTS:

- 1 Each campus must establish a campus fee advisory committee w/ student voting majority
- 2 All mandatory fees are limited to no more than one-third of the cost of education (\$2,922)
- 3 A student referendum is required, except where a more effective mechanism is demonstrated
- 4 Each campus must establish local financial aid programs
- 5 Links (local) financial aid and fee policies
- 6 Requires broad consultation before establishing new or adjusting old fees
- 7 Annual accountability reporting discloses breadth and level of fee activity

FEE CATEGORIES:

- 1 **Mandatory Fees**
Fees that must be paid to apply to, enroll in, attend, or graduate from the university or to take a course offered through the state-funded instructional program
- 2 **Tuition**
Fees to pay the full cost of instruction required of some students by statute (duplicate degree)
- 3 **User Fees**
Fees paid to receive non-instructional materials, services, or for the use of facilities provided by the university or to enroll in a course offered through a self-support instructional program
- 4 **Penalty/Deposit Fees**
Fees or deposits to reimburse the university for additional costs resulting from dishonored payments, late submissions, or misuse of property or as a security or guaranty

THE CALIFORNIA STATE UNIVERSITY
Office of the Chancellor
400 Golden Shore
Long Beach, California 90802-4275

(310) 985-2800

Date: August 23, 1996

To: Presidents

From: Barry Munitz
Chancellor



Subject: Campus Fee Policy – Executive Order No. 661

On May 15, 1996, the Board of Trustees approved a fee policy for The California State University. Enclosed is a copy of Executive Order No. 661 which describes your authority to adjust campus mandatory, user, and penalty fees where all applicable provisions of law and any revenue bond indentures which may be outstanding have been observed.

The enclosed Executive Order authorizes the continuation of all fees which have been duly established. Actions taken after the effective date of this Executive Order to adjust fees that are currently in effect should comply with provisions of this Executive Order.

In accordance with policy of The California State University, the campus president has the responsibility for implementing Executive Orders where applicable and for maintaining the campus repository and index for all Executive Orders.

BM: rp

Attachment

Distribution: Chancellor's Office Staff

Executive Order No. 661

THE CALIFORNIA STATE UNIVERSITY
Office of the Chancellor
400 Golden Shore
Long Beach, California 90802-4275
(310) 985-2800

Executive Order No.: 661

Title: Fees, Rates, and Charges

Effective Date: August 23, 1996

Supersedes: Executive Order Numbers: 188, 231, 242, 243, 246, 252, 333, 360, 362, 363, 364, 379, 391, 397, 414, 429, 461, 473, 489, 494, 501, 506, 530, 539, 546, 549, 562, 566, 567, 570, 571, 574, 578, 588, 589, 592, 594, 596, 597, 604, 606, 608, 609, 612, 617, 619, 623, 625, 626, 627, 629, 633, 634, 635, 636, 637 (in part), 639, 642, 645, 647, 650, 651, 652, 653, 654, 655, 656, 657, 659, 660

This Executive Order is issued pursuant to resolution of the Board of Trustees of The California State University RFIN 05-96-06, a copy of which is included as Attachment 1.

Effective August 23, 1996, campus fees, which have been duly established pursuant to authority of the Board of Trustees or its designees and which are currently in effect shall continue in effect until adjusted or repealed pursuant to this Executive Order. The campus fees which shall continue unless adjusted or repealed as provided herein shall include the fees established or adjusted in the executive orders which are listed above as superseded by this Executive Order.

Effective August 23, 1996, campus fees shall be established, adjusted, collected, and refunded, according to the policies contained herein and any applicable provisions of the law; statutes; Title 5 California Code of Regulations; Standing Orders of the Board of Trustees; and revenue bond indentures which may be outstanding. Attachment 2 of this Executive Order provides additional information which may be helpful in implementing this policy.

The policy delegates to the campus president the authority to adjust campus mandatory, user, and penalty fees. The policy requires that appropriate and meaningful consultation occur before adjusting campus fees or requesting the chancellor to establish a new fee.

The following are actions required of the campus to implement this Executive Order:

Establish a campus fee advisory committee. The fee policy requires each campus to establish a fee advisory committee to provide advice to the campus president regarding proposed fee actions for mandatory, user, or penalty fees. Members of the committee should include administrators, faculty and students. Students appointed by the campus associated students organization must constitute a voting majority on the committee. Executive Order No. 429 required the campus to maintain an instructionally related activities fee advisory committee to review instructionally related activity fees. This executive order supersedes Executive Order No. 429 eliminating the requirement that the campus maintain an instructionally related activities fee advisory committee.

Executive Order No. 661

A student health advisory committee will still be required in accordance with provisions of Executive Order No. 637 to provide advice to the president on campus health service programs. However, the requirement that a student health advisory committee provide advice on health services fees is superseded by this executive order.

Develop student fee referendum procedures. Prior to increasing campus mandatory fees or requesting the chancellor to establish a new campus mandatory fee, the fee policy requires that an advisory student referendum be conducted. Alternative consultation mechanisms are permitted if they can be demonstrated to be more effective in achieving appropriate and meaningful consultation. Alternative consultation mechanisms are not permitted in the following three instances: (1) before initially establishing a student body association fee, a student body organization is required to be approved by two-thirds favorable vote of the students; (2) before increasing a student body association fee, a fee referendum approving the increase is required; and, (3) before initially establishing a student body center fee, a fee referendum approving the fee by two-thirds favorable vote is required. A fee referendum may be conducted either by the campus associated students organization or by the campus as determined by the president. If the referendum is conducted by the campus, the campus is required to fund the cost of the referendum. Results of the fee referendum are advisory to the campus president.

Establish local financial aid programs. The fee policy requires the campus to use local financial aid grant, work study, and waiver programs to offer financial aid adequate to meet additional student need resulting from increases in campus mandatory fees or the establishment of new campus mandatory fees. Local financial aid programs need to be designed and implemented to accomplish this policy objective. The fee policy requires that local financial aid program budgets be increased permanently in the year the fees are adjusted or established by not less than an amount equal to one-third of the additional revenue resulting from an increase in campus mandatory fee levels. Fee waivers may be used, in lieu of financial aid budget increases, to help meet this financial aid requirement.

For example, if a student body center fee increase is approved by the president, after conducting a student referendum and after consideration by the student fee advisory committee, local financial aid programs would have to offer additional financial aid to students to meet the additional need resulting from the fee increase. One example of the type of financial aid that could be used to meet this financial aid policy requirement is a work-study program funded by the student union. The president could also choose to fund direct student grants or waive the additional fee for students that have demonstrated financial need.

Review existing fees to determine if fees can be eliminated or consolidated. The fee policy encourages campus presidents to evaluate existing fees to determine if fees can be consolidated or eliminated to simplify the administration of fees and to enhance the ability of students and their families to plan for the costs of higher education without impairing the ability of the campus to provide access to a high quality program. Consolidating existing fees can create additional funding flexibility for the campus by creating a revenue source from which a variety of services can be funded, including those funded in the past through specific fees. Graduation fees, diploma fees, miscellaneous course fees, and health facilities fees are examples of fees that could be consolidated into a single service fee.



Barry Munitz, Chancellor

Dated: August 23, 1996

COMMITTEE ON FINANCE

Student Fee Policy (REIN 05-96-06)

RESOLVED, By the Board of Trustees of The California State University that Attachment A to Agenda Item 2 of the May 14-15, 1996, meeting of the trustees' Committee on Finance, titled "The California State University Student Fee Policy" is approved and shall take effect immediately; and, be it further

RESOLVED, That the chancellor is directed to take all necessary action to implement the student fee policy in a manner consistent with existing statutes and provisions of bond indentures; and, be it further

RESOLVED, That the campus presidents are encouraged to evaluate all existing fees charged to students to determine if some fees can be consolidated or eliminated to simplify the administration of fees and to enhance the ability of students and their families to plan for the costs of higher education without impairing the ability of the campus to provide access to a high quality program.

The California State University Student Fee Policy

I. Definitions

- A. Mandatory fees — Fees that test be paid to apply to, .enroll in, attend, or graduate from the university or to take a course offered through the state-funded instructional program.
- B. Tuition fees to pay the full cost of instruction required of some students by statute.
- C. User fees — Fees paid to receive non-instructional materials, services, or for the use of facilities provided by the university or to enroll in a course offered through a self-support instructional program.
- D. Penalty fees — Fees or deposits to reimburse the university for additional costs resulting from dishonored payments, late submissions, or misuse of property or as a security or guaranty.

II. Authority

- A. The Board of Trustees provides policy guidance for all matters pertaining to student fees.
- B. The board retains authority to establish, increase, decrease, or abolish system wide mandatory fees.
- C. The chancellor is delegated authority to establish new campus mandatory, user, and penalty fees. The chancellor is not delegated authority to establish new system wide mandatory fees.
- D. The chancellor is delegated authority to increase, decrease, or abolish campus mandatory, user, and penalty fees. The president is not delegated authority to increase, decrease, or abolish system wide mandatory fees\.

III. Responsibility

- A. The president is responsible for assuring that appropriate consultation occurs prior to adjusting any fee and before requesting the chancellor to establish a new fee. This authority is subject to the accountability requirements described below in Section IV,
 - 1. The president shall establish a fee advisory committee comprised of student, faculty, staff, and administrative representatives to provide advice to the campus president.
 - 2. The president shall consult the committee before adjusting any fee and before requesting the chancellor to establish a new fee including a consolidation of existing fees.
 - 3. A statement of revenues and expenditures including a minimum of one year of actual costs and two years of projected revenue and expenditures for the fee revenue supported activity shall be developed by the campus chief financial officer and considered by the campus fee advisory committee prior to the campus president adjusting fees or requesting the chancellor to establish a new fee.
 - 4. Membership of the advisory committee shall be established in consultation with the campus associated students organization and the campus academic senate and shall include the president of the campus associated students organization and the chair of the campus academic senate or their designees
 - 5. Students appointed by the campus associated students organization shall constitute a majority of the voting members of the committee.

5. The campus president shall appoint members to the committee excluding the student representatives who, shall be appointed by the campus associated students organization. Faculty members shall be appointed consistent with normal campus processes for selecting faculty members to serve on similar committees.
 6. The president shall appoint the chair of the committee.
- B. Appropriate consultation with campus constituencies regarding charging fees and allocating fee revenue is critical to assure that the delegated authority is exercised in a manner that is consistent with policies adopted by the board.
1. Appropriate and meaningful consultation includes consultation with bodies such as the campus academic senate, the campus associated students organization and, to adjust or establish mandatory fees, an advisory student referendum.
 2. The policy presumes that a student referendum will be conducted before adjusting or establishing mandatory fees. However, the president may waive the referendum requirement if the president determines that a referendum is not the best mechanism to achieve appropriate and meaningful consultation. If a referendum is not conducted prior to adjusting mandatory fees or requesting the chancellor to establish a new mandatory fee, the president must demonstrate to the chancellor why alternative consultation methods selected were more effective in complying with this policy.
- C. An advisory student referendum is required prior to adjusting a campus mandatory fee or requesting the chancellor to establish a new campus mandatory fee and subject to the exception described in B-2 above. The referendum may be conducted by the campus or the associated students organization. For referenda conducted by the campus, the following shall apply:
1. The campus shall fund costs associated with the referendum.
 2. The results of the referendum shall be advisory to the committee and the president.
 3. The chancellor in consultation with the California State Student Association and the Academic Senate shall develop guidelines applicable to the student fee referendum process designed to assure that the referendum is open, fair, and objective. The guidelines shall include a code of ethics regarding student, faculty, and staff participation in elections. The guidelines shall be included in Title 5 of the California Code of Regulations.
 4. The results of a student fee referendum shall be considered favorable when a majority of students voting approve the fee action.
 5. The committee shall issue a voter pamphlet providing objective analysis of the proposed fee action and statements solicited by the committee for and against the proposed fee action.
 6. The committee shall determine the specific statements that shall be included in the pamphlet.
 7. Copies of the voter pamphlet and ballot and information regarding the dates, times, and polling locations shall be available to students and published in the campus newspaper at least thirty days prior to the referendum.
- D. Campuses shall use local financial aid grant, work study, and waiver programs to offer financial aid adequate to meet additional student need resulting from increases in campus mandatory fees or the establishment of new campus mandatory fees.

1. The base budget for local campus financial aid grant, work study, and waiver programs shall be supplemented permanently in the year the fees are adjusted or established from any appropriate funding source by an amount of not less than one-third of additional revenue resulting from an increase in campus mandatory fee levels.
2. The federal financial aid eligibility methodology shall be used to determine student financial need.
3. Consistent with current policy and practice, all mandatory fees will be included in student financial aid budgets used to determine financial need according to the federal financial aid eligibility methodology.

III. Accountability

- A. Total annual mandatory fees may not exceed one-third of the system wide cost of education. The system wide cost of education is defined as total support expenditures (State University Fee revenue and General Fund support appropriations) divided by the number of full-time equivalent students.
- B. Each campus shall report to the chancellor for the most recently completed fiscal year a complete inventory of all fees charged to students, the total revenue collected for each fee, and the amount of increased funding provided to local financial aid programs to meet additional student need resulting from adjustments to mandatory fee levels. The fee report will be presented to the board by the chancellor to allow the board to consider the level and range of fees charged to students.

I. Mandatory Fees

Fees that must be paid to apply to, enroll in, attend, or graduate from the university or to take a course offered through the state-funded instructional program.

Examples

Admission Application Fee (mandatory system wide fee)
Campus Service (ID) Card Fee
Diploma Fee
Graduation Fee
Health Facilities Fee
Health Services Fee
Instructionally Related Activities Fee
Materials, Services, and Facilities Fee
Miscellaneous Course Fees
Special Test Materials Fee
State University Fee (mandatory system wide fee)
Student Body Association Fee
Student Body Center Fee

Authority to establish and adjust

The Board of Trustees may establish and adjust mandatory system wide fees.
The Chancellor may establish mandatory campus fees.
The president may adjust mandatory campus fees.

Process to establish mandatory campus fees

Consideration by the campus fee advisory committee is required.

A student referendum is required. The president may use alternative consultation mechanisms if the president determines that a referendum is not the best mechanism to achieve appropriate and meaningful consultation. However, a student body association fee must be established upon favorable vote of two-thirds of the students voting in an election held for the purpose of establishing a student body organization (Education Code §89300). A student body center fee may be established only after a fee referendum is held which approves by a two-thirds favorable vote the establishment of the fee (Education Code §89304).

Results of the referendum and the fee committee review are advisory to the campus president except as provided in Education Code §89300 and §89304, when establishing a student body association fee or a student body center fee.

Upon consideration by the campus fee advisory committee and the completion of a student referendum, the president may request the chancellor to establish the mandatory fee.

Process to adjust mandatory campus fees

Consideration by the campus fee advisory committee is required.

A student referendum is required. The president may use alternative consultation mechanisms if the president determines that a referendum is not the best mechanism to achieve appropriate and meaningful consultation. However, the campus president may increase the student body association fee only after the fee increase has been approved by a majority of students voting in a referendum established for that purpose (Education Code §89300).

Results of the referendum and the fee committee review are advisory to the campus president. After consideration by the campus fee advisory committee and the completion of a student referendum, the president may adjust the fee.

Financial Aid

Local financial aid grant, work-study, and waiver programs must be used to offer financial aid adequate to meet additional student need resulting from increases in campus mandatory fees or new campus mandatory fees.

The federal financial aid eligibility methodology must be used to determine not financial need.

II. Tuition Fees

Fees to pay the full cost of instruction required of some students by statute.

Examples

Duplicate Degree Tuition
Nonresident Tuition

Authority to establish and adjust

The Board of Trustees may establish and adjust tuition fees.

The statute requiring the California State University to charge duplicate degree tuition sunsets August 31, 1996.

Process to establish

Resolution by the Board of Trustees.

Process to adjust

Resolution by the Board of Trustees.

Financial Aid

The fee policy does not require that financial aid be provided to meet student financial need associated with tuition fees.

III. User Fees

Fees paid to receive non-instructional materials, services, or for the use of facilities provided by the university or to enroll in a course offered through a self-support instructional program.

Examples

Alumni Placement Fee
American Dietetics Association Transcript Evaluation Fee
Bicycle Storage Fee
Campus General Catalog Fee
Conference, Short Course Institution Fee
Evaluation for Credential Candidate Fee
Extension Course Fee
External Degree Fee
Housing Fee
Installment Fee
Lock and Locker Fee
Music Studio Course (Extension/Summer) Fee

Executive Order No. 661
Attachment 2

Musical Instrument Repair and Insurance Fee
Organ Practice Fee
Parking Fee
Recreation Facilities Fee
Special Examination Fee
Special Session Fee
Summer Session Health Facilities Fee
Summer Session Fee
Test Materials Fee
Thesis Binding Fee
Transcript of Record Fee

Authority to establish and adjust

The chancellor may establish new user fees.

The president may adjust user fees.

Process to establish

Consideration by the campus fee advisory committee is required. Results of the fee committee review are advisory to the campus president.

After consideration by the campus fee advisory committee, the president may request the chancellor to establish the user fee.

Process to adjust

Consideration by the campus fee advisory committee is required. Results of the fee committee review are advisory to the campus president.

After consideration by the campus fee advisory committee, the president may adjust the fee. Some user fees require frequent adjustment to accommodate changing market conditions (e.g., continuing education fees) which may not permit consideration in advance by the committee.

Financial Aid

The fee policy does not require that financial aid be provided to meet student financial need associated with user fees.

IV. Penalty Fees

Fees or deposits to reimburse the university for additional costs resulting from dishonored payments, late submissions, or misuse of property or as a security or guaranty.

Examples

Check Return Fee
Credit Card Transaction Voucher Dishonored Fee
Delayed Transmittal Fee
Enrollment Confirmation Deposit
Failure to Meet Administrative Appointment Fee
Item Lost or Broken Fee
Late Registration Fee
Library Fee

Authority to establish and adjust

The chancellor may establish new penalty fees.

The president may adjust penalty fees.

Process to establish

Consideration by the campus fee advisory committee is required. Results of the fee committee review are advisory to the campus president.

After consideration by the campus fee advisory committee, the president may request the Chancellor to establish the penalty fee.

Process to adjust

Consideration by the campus fee advisory committee is required. Results of the fee committee review are advisory to the campus president.

After consideration by the campus fee advisory committee, the president may adjust the fee.

Financial Aid

The fee policy does not require that financial aid be provided to meet student financial need associated with penalty fees.

Fee Policy Authority

Category/Title:	Establish:	Adjust:	Education Code:
Mandatory			
1. State University Fee	Board	Board	89700
2. Admission Application Fee	Board	Board	89700
3. Campus Service (ID) Card	Chancellor	President	89700
4. Diploma Fee	Chancellor	President	89700
5. Graduation Fee	Chancellor	President	89700
6. Health Facilities Fee	Chancellor	President	89702
7. Health Services Fee	Chancellor	President	89700
8. Instructionally Related Activities Fee	Chancellor	President	89700
9. Miscellaneous Course Fees	Chancellor	President	89700
10. Special Test Materials Fee	Chancellor	President	89700
11. Student Body Association Fee	Chancellor	President	89300
12. Student Body Center Fee	Chancellor	President	89034; 90012; 90068
Tuition			
1. Duplicate Degree Tuition	Board	Board	66170 et seq
2. Nonresident Tuition	Board	Board	89705
User			
1. Alumni Placement Fee	Chancellor	President	89700
2. American Dietetics Assoc. Transcript Evaluation	Chancellor	President	89700
3. Bicycle Storage Fee	Chancellor	President	89700
4. Campus General Catalog Fee	Chancellor	President	89700
5. Conference, Short Course Institution	Chancellor	President	89700
6. Evaluation for Credential Candidate Fee	Chancellor	President	89700
7. Extension Course Fee	Chancellor	President	89708; 89709
8. External Degree Fee	Chancellor	President	89708; 89709
9. Housing Fee	Chancellor	President	89700; 90012; 90068
10. Installment Fee	Chancellor	President	89700.1
11. Lock and Locker Fee	Chancellor	President	89700
12. Music Studio Course (Extension/Summer)	Chancellor	President	89700
13. Musical Instrument Repair and Insurance	Chancellor	President	89700
14. Organ Practice Fee	Chancellor	President	89700
15. Parking Fee	Chancellor	President	89701
16. Recreation Facilities Fee	Chancellor	President	89700
17. Special Examination Fee	Chancellor	President	89700
18. Special Session Fee	Chancellor	President	89708; 89709
19. Summer Session (Health Facilities Fee)	Chancellor	President	89702
20. Summer Session Fee	Chancellor	President	89708
21. Test Materials Fee	Chancellor	President	89700
22. Thesis Binding Fee	Chancellor	President	89700
23. Transcript of Record Fee	Chancellor	President	89700
Penalty/Deposit			
1. Check Return Fee	Chancellor	President	89700
2. Credit Card Transaction Voucher Dishonored Fee	Chancellor	President	89700
3. Delayed Transmittal Fee	Chancellor	President	89700
4. Enrollment Confirmation Deposit	Chancellor	President	89700
5. Failure to meet administrative appointment	Chancellor	President	89700
6. Item Lost or Broken Fee	Chancellor	President	89700
7. Late Registration Fee	Chancellor	President	89700
8. Library Fees	Chancellor	President	89700

MESSAGE FROM

THE VICE CHANCELLOR'S DESK

On May 15, 1996, the Board of Trustees approved a new California State University student fee policy. There are a number of significant changes in policies and procedures that will be required to implement the fee policy. We are scheduled to review the implementation plan for the new fee policy at the June 25-26, 1996 Executive Council meeting. Following is a brief summary of the topics that we will address in more depth once the formal implementation plan has been approved.

Establish a campus fee advisory committee. The fee policy requires each campus to establish a fee advisory committee to provide advice to the campus president regarding charging fees and allocating fee revenue. The fee advisory committee provides advice to the president on proposed fee actions for mandatory, user, and penalty fees.

Develop student fee referendum procedures. Prior to increasing campus mandatory fees or requesting the Chancellor to establish a new campus mandatory fee, the new fee policy envisions that a student referendum will be conducted. The policy does permit alternative consultation mechanisms if they can be demonstrated to be more effective. The fee referendum may be conducted either by the campus associated students' organization or by the fee advisory committee. If the referendum is conducted by the fee advisory committee, the campus is required to fund the cost of the referendum.

Establish local financial aid programs. The fee policy requires the campus to develop local financial aid grant, work study, and waiver programs to offer financial aid adequate to meet additional student need resulting from increases in campus mandatory fees or the establishment of new campus mandatory fees. Local Financial aid programs need to be designed and implemented to accomplish this policy objective.

Review existing fees to determine if fees can be eliminated or consolidated. The Trustees encouraged campus presidents to evaluate existing fees to determine if *fees* can be consolidated or eliminated to simplify the administration of fees and to enhance the ability of students and their families to plan for the costs of higher education without impairing the ability of the campus to provide access to a high quality program. Consolidating existing fees can create additional funding flexibility for the campus by creating a general revenue source from which a variety of services can be funded, including those funded in the past through specific fees. Examples of the types of fees that might be consolidated into a single service fees are graduation and diploma fees, miscellaneous course fees, and health facilities fees.

Revise Standing Orders of the Board of Trustees to incorporate the new fee framework and delegate authority to establish and adjust fees. Existing standing orders related to specific fees will be eliminated. New Standing Orders will be proposed in July for information and in September for action.

Establish an ad hoc system wide committee comprised of representatives from the California State Student Association, the Academic Senate, and the campuses to develop student fee referendum guidelines for publication in Title 5. The Board's fee policy requires the Chancellor to develop guidelines applicable to the student fee referendum process designed to ensure that the referendum is open, fair, and objective.

Distribute draft outline of fee accountability report for review and comment. The fee policy requires that an annual report be provided to the Board. We plan to provide the report to the board in conjunction with the 1998/99 budget presentation in September 1997. A fee report information request will be sent to campuses in March 1997, to gather information for the report to the Board of Trustees.

Richard West, Vice Chancellor, Business and Finance

Campus Fee Policy Frequently Asked Questions

Regarding the fee advisory committee, the policy states that the campus" ... shall establish a fee advisory committee comprised of student, faculty, staff, and administrative representatives." Is there a difference between "staff" and "administration?" If yes, what does "staff" mean or what is envisioned by that term?

- We tried to include everyone (some campuses only consider management administration and everyone else staff). You should interpret it in the manner that best suits your campus.

For referenda conducted by AS, are the results of a referendum conducted by the AS advisory to the committee and the president?

- Except in the instances where the Education Code (89300 and 89304) requires the Trustees to initially establish student body association and center fees, yes, the referenda are advisory.

For referenda conducted by AS, are the results of a referendum conducted by the AS considered favorable if a majority of students voting approve the fee action?

- Except in the instance where the Education Code (89300 and 89304) requires a 213 favorable vote to initially establish the student body center and student body association fee, yes a simple majority is considered favorable.

For referenda conducted by AS, must the AS issue a voter pamphlet providing objective analysis of the proposed fee action and statements for and against the proposed fee action?

- Title 5, Section 41400 et seq. includes the requirements for referenda conducted by the campus associated students.

For referenda conducted by AS, does the AS determine the specific statements that shall be included in the voter pamphlet?

- Title 5, Section 41400 et seq. includes the requirements for referenda conducted by the campus associated students.

For referenda conducted by AS, must AS publish in the campus newspaper at least thirty days prior to the referendum copies of the voter pamphlet and ballot and information regarding the dates, times, and polling locations?

- Title 5 41400 et seq. includes the requirements for referenda conducted by the campus associated students. The notice period in Title 5 is two weeks.

Regarding local financial aid programs, the policy states that local campus financial aid programs" ... shall be supplemented permanently in the year the fees are adjusted or established from any appropriate funding source." What are appropriate funding sources? Who determines what is an appropriate funding source? May the additional revenue be raised through the proposed fee increase? For example, if the additional revenue needed to be raised through a proposed fee increase equaled \$2,000,000 may the proposed fee be set at a level to raise \$3,000,000, \$1,400,000 of which would be dedicated to local financial aid?

- Appropriate funding sources are determined by the campus after consideration of applicable statutes, policies, and provisions of any bond indentures that may be outstanding. Generally, appropriate funding sources are any unrestricted funds available to the university. Student fee revenue can be considered an appropriate funding source.

Regarding the overall level of fees, the policy states "Total annual mandatory fees may not exceed one-third of the system wide cost of education." What is this amount?

- This amount will change each year. For 1996/97, the cost of education is calculated as follows:
- Total General Fund Appropriation \$1,775,000,000
- Total State University Fee Revenue + 465,000,000
- Total Support Appropriation = \$2,240,000,000
- Budgeted System wide FTES 255,501
- Cost of Education Per FTES = \$8,766
- One Third of the Cost of Education \$2,922

Regarding fees, who makes the decision as to which category a fee may fall under?

- The campus based upon the definitions provided in the Board item

Regarding fees, who can answer questions a campus may have about a fee? For example, what is a "special test materials fee" or an "academic program fee?"

- You can refer questions to Mark Lopez in the budget office at mark_lopez@calstate.edu.

Regarding fees, does every fee charged to student by the university or one of its auxiliaries have to fall in one of the four categories listed? For example, bowling shoe rental or housing?

- The campus fee policy only deals with fees charged by the Board of Trustees (by implication the campus). Auxiliary organization fees are not subject to this policy.

Regarding penalty fees, do parking tickets/fees related to missed registration payments fall into this category?

- Yes

"Bicycle Storage Fee" is listed as a user fee. Are then "locker" fees our students pay in the student union user fees?

- Yes, a locker fee is for the use of a facility that is not related to an instructional service

"American Dietetics Assoc. Transcript Evaluation" is listed as a user fee. Are then fees our students pay in the Center for Disabled Students related to learning aids user fees?

- Some would argue that for a student with a hearing impairment to take advantage of a state funded course, the student must have an assistive device. These types of fees may reasonably be considered mandatory fees.

Are cap/gown/hood fees user fees?

- Under the general example of graduate fees, these fees would be considered mandatory if required to have a cap/gown/hood to participate in the graduation which is one of the "basic" services provided.

"Special Examination Fee" is listed as a user fee. Are then fees related to tests administered in Career Placement Services user fees?

- Other than the Special Test Materials Fees (for example, fees for standard psychological test materials used in a psychology course that must be purchased to take the course) which are mandatory fees, testing fees are user fees.

"Campus General Catalog Fee" is listed as a user fee. Is then the cost of the class schedule also a user fee?

- If the catalog is sold by the bookstore, then it is not a fee but a purchase and is not covered under this policy.

Are costs to attend New Student Orientation user fees?

- If new student orientation is required to apply, enroll, attend, or graduate from the university, then it is a mandatory fee.

"Recreation Facilities Fees," which on our campus is an AS program, are listed as user fees. Are then recreations fees in the University Center, which is also an AS program, user fees?

- Yes, generally unless the recreation fee is required of all students (that it required to be paid to complete enrollment) which would make it a mandatory fee.

Are copying costs in various academic buildings user fees?

- Copying costs are purchases-same as buying a coke from the vending machine, and not covered by the policy.

Considering that a mandatory fee is any fee that any student may pay to receive basic levels of services, would the following be considered mandatory fees?

A \$3.50 phone registration fee

- Registration fees would be considered mandatory fees (required to enroll in the university).

A fee to take the English Writing Placement test

- Is it required to enroll or take a course? If yes, then it is a mandatory fee.

A fee to take the Entry Level Mathematics Exam

- See English Writing example.

A fee to take the Mathematics Qualifying Exam (prerequisite for three math courses)

- Required to take a course offered... mandatory fee.

A fee to take the Accounting Qualifying Exam

- See English Writing Placement example

Last Update: 8/20/96

Name: Brad Wells

Email: brad_wells@calstate.edu