

STUDENT FEE POLICY

POLICY

Implementation Date: 9/18/08

Definition

On June 26, 2008 the Office of the Chancellor issued Executive Order 1034, superseding Executive Order 740 as the California State University Student Fee Policy and Miscellaneous Course Fee Delegation of Authority. Executive Order 1034 re-categorizes student fees, changes the authority for some fees, outlines the process for establishing and adjusting fees, and strengthens the reporting requirements in all categories.

The miscellaneous course fee delegation of authority gives campus presidents the ability to establish miscellaneous course fees on their campus within the ranges established by Executive Order 1034. Any fees that go above approved ranges must be forwarded to the Chancellor's Office for approval.

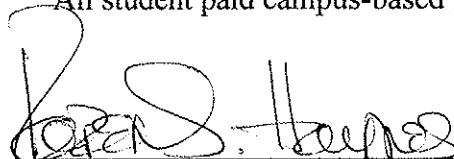
Each campus should review all existing campus-based fees, including miscellaneous course fees, to ensure they comply with Executive Order 1034. Fees that no longer comply with this policy will need to be revised, suspended or eliminated.

Authority

Executive Order No. 1034, and Education Code Sections 89035 and 89700, Standing Orders of the Board of Trustees, Chapter II, i, and Board of Trustees' Resolution RFIN 05-08-04.

Scope

All student paid campus-based fees.



Karen S. Haynes, President

9/18/08

Approval Date

Revised: 8/21/08
Implemented initially: 10/26/2000

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The California State University Student Fee Policy

I. Definitions

- A. Category I fees – Systemwide mandatory fees that must be paid to apply to, enroll in, or attend the university, or to pay the full cost of instruction required of some students by statute.
- B. Category II fees -- Campus mandatory fees that must be paid to enroll in or attend the university.
- C. Category III fees – Fees associated with state-supported courses. Specifically for materials and services used in concert with the basic foundation of an academic course offering.
- D. Category IV fees – Fees, other than Category II or III fees, paid to receive materials, services, or for the use of facilities provided by the university; and 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.
- E. Category V fees – Fees paid to self-support programs such as Extended Education, Parking and Housing including materials and services fees, user fees, fines, deposits.

II. Authority

- A. The Board of Trustees provides policy guidance for all matters pertaining to student fees and has the authority for the establishment, oversight and adjustment of Category I fees.
- B. The chancellor is delegated authority for the establishment, oversight and adjustment of Category II and Category III campus fees. The chancellor is not delegated authority for Category I fees.
- C. The president is delegated authority for the establishment, oversight and adjustment of Category IV and Category V campus fees, and for the oversight and adjustment of Category II and III fees. The president is not delegated authority to establish Category I, Category II or Category III fees, or to adjust Category I fees. The president does however, have authority to establish Category III fees within a range established by the chancellor.

III. Responsibility

- A. The president is responsible for assuring that appropriate consultation occurs prior to adjusting any fee and before requesting that the chancellor establish a new fee.

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1. The president shall establish a fee advisory committee comprised of student, faculty, staff and administrative representatives to provide advice to the campus president. Membership of the fee advisory committee shall be established in consultation with the campus student body association and the campus faculty senate and shall include the president of the campus student body association and the chair of the campus faculty senate or their designees. The president shall appoint the chair of the fee advisory committee.
 2. The president shall appoint members to the fee advisory committee, excluding the student representatives who shall be appointed by the campus student body association. Faculty members shall be appointed consistent with normal campus processes for selecting faculty members to service on similar committees. The president shall consult with the committee before adjusting any fee and before requesting the chancellor to establish a new fee including a consolidation of existing fees.
 3. Students appointed by the campus student body association shall constitute a majority of the voting members of the fee advisory committee.
 4. 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 president prior to establishing or adjusting any fee.
 5. The president shall consult with the fee advisory committee before adjusting or establishing any Category II or III fees and will record in writing his/her approval.
 - a) The fee advisory committee will consider proposals for the establishment and adjustment of Category II or III fees, and will then make a recommendation to the president.
 - b) The president will make a determination on Category IV and V fees after consideration of the revenue and expenditure plans associated with the fees, and will then notify the fee advisory committee of his or her decision.
- B. Appropriate and meaningful consultation with campus constituencies regarding campus-based mandatory fees and the use of fee revenue is critical to assure that the delegated authority is exercised in a manner that is consistent with policies adopted by the board.

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1. Appropriate and meaningful consultation includes consultation with bodies such as the campus faculty senate, the campus student body association and other constituencies affected by any proposed increase in an existing fee or establishment of a new fee.
 2. The policy presumes that a student fee referendum will be conducted before adjusting or establishing Category II fees. However, the president may waive the referendum requirement (unless it is required by Education Code) if the president determines that a referendum is not the best mechanism to achieve appropriate and meaningful consultation.
 3. If a referendum is not conducted prior to adjusting Category II fees or requesting the chancellor to establish a new Category II fee, the president must demonstrate to the fee advisory committee the reasons why the alternative consultation methods selected will be more effective in complying with this policy.
- C. An advisory student referendum is the preferred method of measuring student support prior to adjusting a Category II fee or requesting the chancellor to establish a new Category II fee but is subject to the exception described in B-2 above. The referendum may be conducted by the campus or the student body association. For referenda conducted by the campus, the following shall apply:
1. The president, in consultation with the student body association and the faculty senate, shall develop guidelines applicable to the student fee referendum process designed to assure that the referendum is open, fair, and objective.
 2. The campus shall fund costs associated with the referendum.
 3. The fee advisory 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.
 4. The fee advisory committee shall determine the specific statements that shall be included in the pamphlet.
 5. 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 and in other public locations around campus at least thirty days prior to the referendum; SFAC, through the Office of the Vice President for Student Affairs, will initiate the posting process.

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6. The results of a referendum shall be considered favorable when a majority of students voting approve the fee action.
 7. The results of the referendum shall be advisory to the fee advisory committee and the president.
- D. If it is determined that a referendum is not the best mechanism for appropriate and meaningful consultation, and is not required by Education Code, an alternative consultation process may be utilized. The following shall apply:
1. The president, upon deciding that a referendum will not allow for the best measure of student opinion, will inform the fee advisory committee of his/her intent to begin alternative consultation.
 2. Alternative consultation strategies shall be developed with input from the student body association and the fee advisory committee to ensure that the process is transparent, and meaningful, and shall solicit the input of a representative sample of the student body.
 3. A representative sample should include students in leadership positions as well as students who are not involved in campus leadership. Efforts should be made to include students from aspects of campus life regardless of the type of fee.
 4. Any written material regarding the new fee, or fee increase, should follow the same guidelines as the referendum voter pamphlet (Section C above) to provide objective analysis of the fee or fee increase.
 5. Results of the alternative consultation process should be summarized and put in writing and used as additional advisory material to be taken into consideration by the fee advisory committee and the president.
 6. If a Category II fee for a capital project (i.e., university union building, or health services building) must be raised to meet minimum debt service revenue bond requirements that were not required when the fee was established, the president can make that adjustment without a full alternative consultation process, but must present the debt service requirements and revenue projections to the fee advisory committee prior to making the adjustment.

IV. Accountability

- A. The campus president shall provide to the fee advisory committee a report of all fees in Categories II, III, IV and V. New fees, fee increases, total revenue and unexpended

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balances should be included in this report. The president has the authority to decrease, suspend or eliminate fees as needed.

- B. Each campus shall report annually to the chancellor, for the most recently completed fiscal year, a complete inventory of all fees in Categories II, III, IV, and V, including past year and current year fee rates, the total revenue collected for each fee, and the remaining balance for each fee. The Category II 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.

V. Miscellaneous Course Fees

- A. Miscellaneous course fees are defined as fees collected for materials, services or use of facilities used in concert with the basic complement of supplies needed for state-supported instruction. Miscellaneous course fees should provide materials or services that have a tangible benefit to students. Miscellaneous course fees are **not** to be charged in lieu of classroom and laboratory supplies and materials provided by enrollment funding campuses regularly receive through marginal cost of instruction per student and permanent base budget allocations.
- B. Miscellaneous course fees can only be charged for the actual cost of providing exceptional instructional materials, services or use of an off campus facility. Students must have the option of attaining the materials or services required through alternative means; however, in cases where such alternative means are unavailable, students cannot opt out of utilizing the required material or service and must pay the miscellaneous course fee.
- C. The following rules apply when determining if miscellaneous course fees can be charged for exceptional materials or services in the classroom:
1. Miscellaneous course fees can only be charged for the actual cost of the material, service or use of facility being provided.
 2. A miscellaneous course fee **cannot** be charged for the basic complement of classroom supplies and materials required for instruction. These include but are not limited to: chalk, erasers, paper clips, pointers, classroom instructional equipment such as projectors (slide, overhead, computer, etc.) and associated supplies (bulbs, transparencies, software, etc.), or any other supplies deemed necessary to equip the instructional space for courses.
 3. A miscellaneous course fee **cannot** be charged for the basic complement of laboratory supplies and instructional equipment necessary for classroom lab requirements identified in the course description. These include but are not limited to equipment, test tubes, work stations, computers or any supplies

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necessary to equip laboratory space to complement classroom course instruction.

4. Administrative charges and inflationary factors **cannot** be added to miscellaneous course fees. Only the actual cost of the material, service or use of a facility can be charged.
5. A miscellaneous course fee **cannot** be charged to fund the basic cost of instruction. Instructional costs are funded through marginal cost dollars, state university fee revenue, and permanent base budget allocations.

D. Approved Fee Ranges:

1. \$0 - \$150 Fees that supplement the basic complement of classroom and laboratory instruction by providing materials and services that would otherwise be unavailable to students, and which allow students to meet the educational objectives of a given course.
2. \$0 - \$3,000 Fees for courses that require field trips or travel off campus in order to meet the educational objectives of a given course.

VI. Student Fee Advisory Committee (SFAC) membership

- A. 4 students; appointed each year, 1 to be the Associated Students, Inc., president or designee.
- B. 2 faculty members; 1 chair of the Academic Senate, or designee; 1 appointed for a 2-year term
- C. 1 staff member; appointed for a 2-year term
- D. Ex-officio members (non voting)
 1. Vice president for Student Affairs, or designee, chair
 2. Director of Financial Aid and Scholarships, or designee
 3. Student Financial Services representative
 4. Budget Office representative
 5. Staff support

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VII. Fee Proposal Guidelines

- A. The proposal should describe the new fee or fee adjustment
- B. The proposal narrative should explain why the new fee or fee adjustment is needed and supports the mission of the university
- C. 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 or designee.
- D. SFAC will conduct a preliminary review and discussion of the proposal to ensure all necessary information is contained in the proposal; additional information will be requested if needed
- E. Fee proposal originators will be invited to present and discuss their proposal to SFAC