

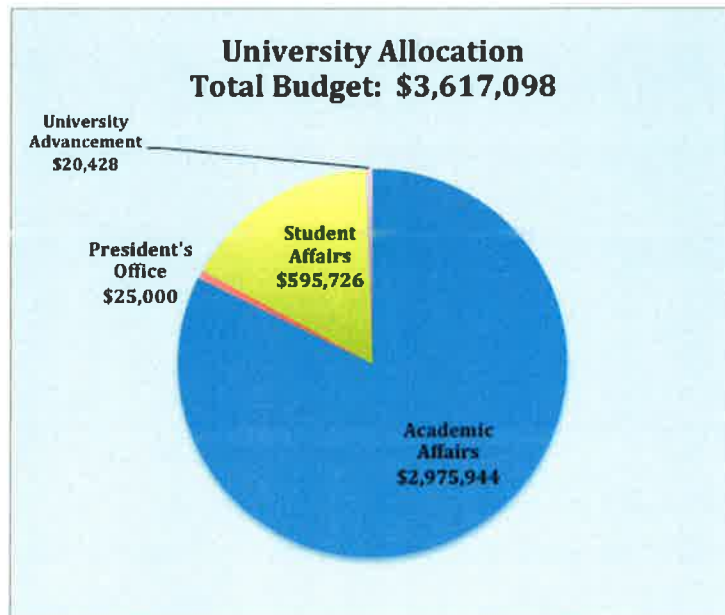
- Student Success Fee
- Student Success Fee FAQs
- Student Success Fee Executive Order
- 2014-2015 AE&SS Fee Report
- Fee Background
- Fees at Other Campuses

2014-2015 AE&SS FEE REPORT

The Academic Excellence and Student Success (AE&SS) fee is designed to support student learning and engagement; and to ensure that students graduate in a timely manner with the tools to be successful in their chosen careers. The fee has been used for additional course sections, undergraduate advising, career support, academic support, and student life and recreational opportunities. It has preserved our student-centered mission, vision and values, and provides students increased opportunities for success.

Per [Executive Order 1054](#), during the alternative consultation process for the AE&SS fee, students had an opportunity to learn about how the fee would contribute to faster graduation times. By graduating even one semester earlier, students would be able to save \$8,000-23,000 in tuition, fees and expenses, and start their careers earlier. One of the most important aspects of the AE&SS fee is that 100% of the fee—unlike tuition or other payments—stays on our campus for the intended use: providing quality programs and services to students despite the economic challenges experienced by the state or CSU system. Another important finding from the alternative consultation process was that students wanted to remain informed about how the fee was put to use each year. Together with the Budget Office and Student Fee Advisory Committee, the following information has been provided to offer transparency of AE&SS allocations for the 2014-2015 academic year.

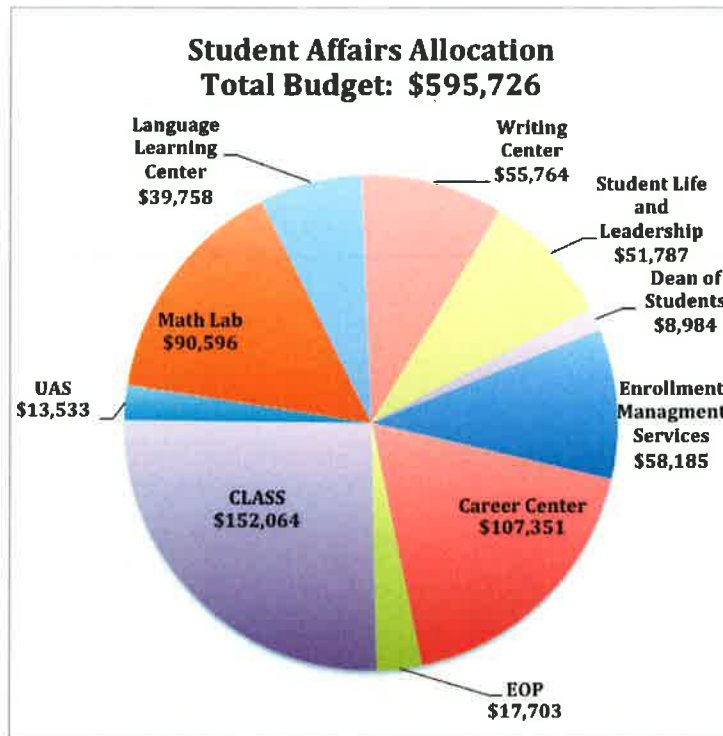
Figure 1



University Allocation Total Budget (Figure 1)

- Total AE&SS fee allocation for AY 2014-2015: \$3.6M
- \$2.9M allocated to the colleges through Academic Affairs
- \$595K allocated to Student Affairs in support of the learning centers, academic advising, and career services
- \$25K and \$20K were allocated to the President's office and University Advancement, respectively, for initiatives in support of the university's efforts to improve student retention and graduation

Figure 2

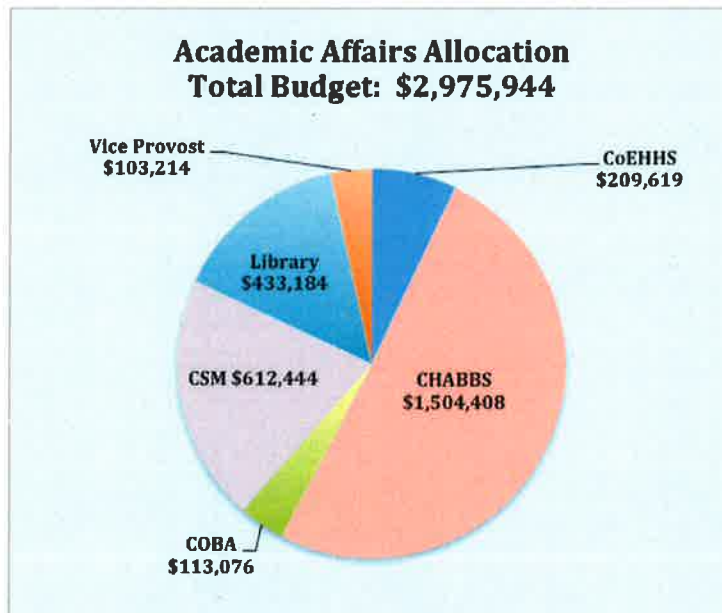


Student Affairs Allocation (Figure 2)

Total Student Affairs allocation for AY 2014-2015: \$595K

- \$186K allocated to the learning centers
- \$273K allocation to the Career Center, CLASS and UAS for additional staff members to improve the student/staff ratio for student services
- \$60K allocated to SLL and the Dean of Students Office for co-curricular programming and residential education
- \$58K allocated to EMS for records management, courseload optimization and graduation verification

Figure 3



Academic Affairs Allocation Total Budget (Figure 3)

Total Academic Affairs allocation for AY 2014-2015: \$2.9M

- \$2.4M allocated to the four colleges (more than 75% of the Academic Affairs allocation), with funds supporting increased course sections and additional faculty in impacted majors
- \$433K allocated to the Library, enabling expanded hours during the academic year and additional subscriptions to support student and faculty research and development
- \$103K allocated to the office of the Vice Provost for supplemental instruction and graduate studies

The University Budget Committee (UBC), in its advisory role to the President, provides recommendations for funding priorities that are aligned to the campus's strategic plan. The AE&SS fee funds priorities that are linked to student success through providing course sections, supporting student academic and career support services and increasing library resources. Each fall the Office of the Vice President for Student Affairs, which oversees all student fees through the Student Fee Advisory Committee (SFAC), provides information on the previous academic year's allocations. SFAC meets on a monthly basis, and is comprised of students, faculty, staff and administrators. Members of the university community are welcome to attend meetings.

- WHY THE SUCCESS FEE
- Student Success Fee/FADs
- Student Success Fee Executive Order
- 2014-2015 AESSS Fee Report
- Fee Background
- Alternative Consultation
- Proposed Fee Structure
- Student Forum Presentation (PDF)
- Task Force Members
- Correspondence
- Fees of Other Campuses

PROPOSED FEE STRUCTURE

If implemented, the fee would come into effect in fall 2013. Based on that start date, these are the proposed fee amounts per semester over the next four school years:

- **\$125** per semester for 2013-2014
- **\$175** per semester for 2014-2015
- **\$225** per semester for 2015-2016
- **\$275** per semester for 2016-2017 (the fee would remain steady thereafter)

During the first year of the fee in 2013-2014, here is a breakdown that shows how we propose that the \$125 fee would be allocated each semester:

- **\$60** to add sections for high demand courses during peak times, evenings and online
- **\$15** for expanded library hours and library resources
- **\$25** for student academic support (eg: expanded free tutoring at Math & Writing Labs, Career Search Support & Coaching, expanded technology for e-advising, online tutoring, personalized services, SmartPlanners, progress indicators)
- **\$25** for expansion of the Clarke Field House (expanded weight room, more space for aerobics and health & wellness, expanded gym, plus additional gym for intramural sports, Athletics, events and PE / Kinesiology instruction)

= gets 20% of fee

IMPLEMENTED FEE STRUCTURE

After consultation with SFAC, the President approved the following structure for implementation effective Fall 2013. The \$25.00 for the Clarke Field House expansion was removed from the AE & SS Fee.

- **\$100** per semester for 2013-2014
- **\$150** per semester for 2014-2015
- **\$200** per semester for 2015-2016
- **\$250** per semester for 2016-2017

→ \$40 split?

Your University YOUR FUTURE



California State University
SAN MARCOS



PROPOSITION 30

\$5.4 million cut avoided
– \$4.1 million in tuition refunds

= *Net gain of only \$1.3 million*



HOW IT WILL IMPACT YOU

- Unit limits will continue
- Fewer course sections and electives
- Less Library resources for research and learning
- Fewer academic options will be launched
- Cuts to student support programs and services will have to occur
- The value of your degree may not increase post-graduation

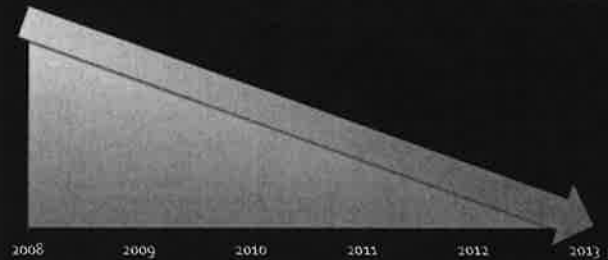


WHAT YOU TOLD US

- You want more specifics about where funds will go.
- You need classes to graduate.
- Academic support and student life are important.
- Fee discussed was too high.
- You want accountability for where your dollars are being spent.



STATE FUNDING TO CSUSM



– \$18 million since 2008

YOUR ACADEMIC EXPERIENCE IS AT RISK

- Class sections have been cut
- Unit caps
- Fewer academic options
- Fewer support services
- Fewer resources for student research and learning assistance
- Taking longer to graduate



**You spoke.
We listened.**



PROPOSED FEE

The fee would be tiered over four years:

- \$125 per semester for 2013-2014
- \$175 per semester for 2014-2015
- \$225 per semester for 2015-2016
- \$275 per semester for 2016-2017 (the fee would remain steady thereafter)

How will it be allocated each semester?



What will you get?



\$15 for expanded library hours & resources



\$25 for expansion of the Clarke Field House

Future allocations across the categories will be recommended annually by the Student Fee Advisory Committee where students are the majority:



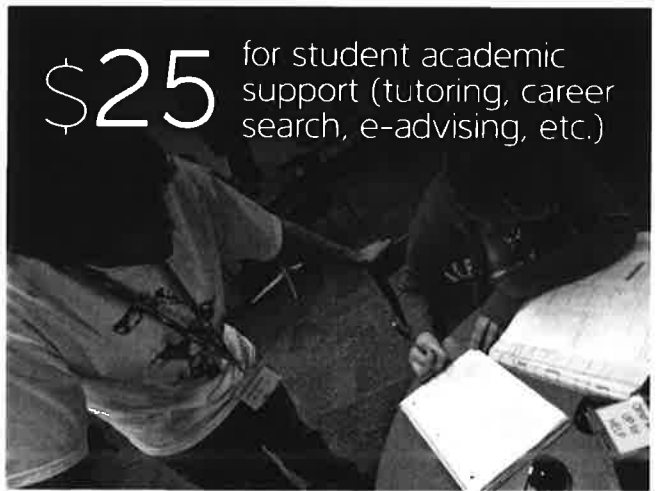
4 students



3 faculty / administrators



\$60 to add sections for high demand courses



\$25 for student academic support (tutoring, career search, e-advicing, etc.)



THE FEE WILL HELP YOU SAVE

By graduating a semester earlier, the fee may allow you to save approximately

\$8,500 – \$12,000

that you would have otherwise spent on tuition, fees, books, and living expenses during that extra semester.



YOU CONTROL THE FUTURE

Anything funded by the fee must make a demonstrable difference toward your progress and educational quality.

Measures of accountability with a report to the Student Fee Advisory Committee and made available publicly.



THE ROI CONTINUES AS AN ALUM

- Preserve the quality of your education
- Strengthen the future value of your degree
- Secure your post-college future



Any questions?



YOUR VOICE CHOOSES YOUR FUTURE



- Input on questionnaire at the end of the presentation.
- Feedback informs the President's decision. Advisory to SFAC and President.
- Final approval rests with Chancellor



QUESTIONNAIRE



- Instructions for completing
- Proctors available to collect them
- Pencils available if needed (can use pen or pencil to complete)

to signed PDF version

June 18, 2013

MEMORANDUM

TO: Dr. Karen S. Haynes, President
California State University San Marcos

FROM: Timothy P. White
Chancellor

SUBJECT: Academic Excellence and Student Success Fee - Executive Order 1086

Attached is a copy of Executive Order 1086, which authorizes California State University San Marcos to establish a Category II mandatory Academic Excellence and Student Success Fee.

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

If you have questions regarding this executive order, please call the CSU Budget Office at (562) 951-4560.

TPW/rr

Attachment

Executive Order 1086

**THE CALIFORNIA STATE UNIVERSITY
Office of the Chancellor
401 Golden Shore
Long Beach, California 90802-4210
(562) 951-4560**

Executive Order: 1086

Effective Date: June 18, 2013

Supersedes: No Prior Executive Order

Title: Academic Excellence and Student Success Fee (AESSF)

This executive order is issued pursuant to Education Code Section 89035 and Board of Trustees Standing Orders, Section II(i) and consonant with Executive Order 1054.

Effective fall semester 2013, CSU San Marcos is authorized to establish a mandatory Category II Academic Excellence and Student Success Fee at the rate of \$100 per semester during fiscal year 2013-14 with scheduled increases of \$50 per semester reaching a maximum rate of \$250 per semester in academic year 2016-17. This fee will support three priorities: reducing time to graduation, expanded library hours and resources, and student academic support. A committee made up of a majority of student members will make future allocation recommendations annually. Consultation with campus constituencies shall occur regarding the oversight of revenue received from this fee and the campus administration will develop a plan for outcomes and accountability to ensure proper management of fee revenues.

In accordance with the campus' stated commitment, anything funded by the AESSF must make a demonstrable difference toward student progress and success. In using a portion of the fee revenue to provide additional course sections to reduce time to graduation, the campus is encouraged to use Cal State Online for bottleneck course relief.

Fiscal Year	AESSF Semester Fee	AESSF Academic Year Rate
2013-14	\$100	\$200
2014-15	\$150	\$300
2015-16	\$200	\$400
2016-17	\$250	\$500

After spring 2017, the \$250 per semester fee rate will remain constant. Any changes to this fee must follow the Category II fee adjustment process described in the CSU Student Fee Policy, section IV, of Executive Order 1054 or its successor.

Revenue from this fee cannot be used for the following: general employee salaries and benefits increases, travel, general hardware or software for faculty or administrators, or capital improvement projects that are unrelated to the identified goals associated with this fee.

Board of Trustees fee policy requires that the revenue generated by this fee be reviewed annually by the student fee advisory committee and reported to the Chancellor's Office in the annual fee survey. If balances exist without an expenditure plan, the campus may be asked to reduce or suspend the fee until such time that all balances are spent on the priorities indicated in this executive order.

In accordance with Section 89721(l) of the Education Code, revenue collected from student fees shall be deposited in a local trust account.

Timothy P. White, Chancellor

Dated: June 18, 2013

EXTENDED LEARNING

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- Degrees
- Certificates/Programs
- Courses
- Open U
- Custom Training
- Osher

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Regulatory Authorizations

Extended Learning Fees

CSUSM at Temecula - students in degree programs:

Mandatory Fee	Fall '15 - Summer '16 Assessed by EL
Academic Records	Yes \$12
Associated Students	Yes \$50
Athletics	Yes \$60
Child Care Services	Opt-In \$10
Health Facilities/Services	Opt-In \$95
AESS Student Success	Yes \$200 (\$140 facility/op: \$30 library; \$30 Career Center)
Mental Health	Opt-In \$74
Recreation	Opt-In \$35
Student Union	No \$315
Temecula Facilities/Operations	Yes \$315
EL Temecula Technology Fee	Yes \$43
Writing/Math Center	Yes \$20
Library	Yes \$37
TOTAL MAND FEES	\$737

CSUSM San Marcos campus — students in degree programs:

Mandatory Fee	Fall '15 - Summer '16 Assessed by EL
Academic Records	Yes \$12
Associated Students	Yes \$50
Athletics	Yes \$100
Child Care Services	Opt-In \$10
Health Facilities/Services	Opt-In \$95
EL Technology Fee	Yes \$25
AESS	Yes \$200 (\$140 AA; \$30 library; \$30 Career Center)
Mental Health	Opt-In \$74
Recreation	Yes \$35
Student Union	Yes \$315
TOTAL MAND FEES	\$737

CSUSM at Temecula fees - students taking Open University courses, Special

AESS	No \$100
Mental Health	Opt-In \$74
Recreation	Opt-In \$35
SA-EMS Admin Fee	Yes \$10
TOTAL MAND FEES	\$65

Monica Gillie

From: Pamela Wells
Sent: Wednesday, February 24, 2016 3:35 PM
To: Mike Schroder
Subject: Re: EL Fees to the Career Center

Hi Mike -

Thanks for the quick reply. Who is the best person in your shop to give us estimates?

As I said the budget office is thoroughly confused about this.

Pam

> On Feb 24, 2016, at 3:20 PM, Mike Schroder <mschrode@csusm.edu> wrote:

>

> Pam, there is a direct line item set up for Temecula that is for career center.

>

> There is also a portion of the student success fee for all EL students whether Temecula or main campus that is going to the student success fee for self support programs and there is a portion of that for career center.

>

> Mike

>

> Sent from the iPhone of Mike Schroder

> mschroder@csusm.edu

> 760-271-4529

>

>

>> On Feb 24, 2016, at 3:03 PM, Pamela Wells <pwells@csusm.edu> wrote:

>>

>> Hi Mike -

>>

>> In putting together our budget requests for 2016-2017 there has been a lot of confusion about the fees we have been getting from EL. When you and I met you explained that the jump in the amount this past year was due to a student success fee that was implemented as well as enrollment growth. I got the impression that all EL students in degree programs paid these fees as we talked about an enrollment number of 1700 students. We are getting information now that says it is only from Temecula students.

>>

>> The budget office, Justin Lewis in Student Affairs as well as the Career Center budget manager are trying to figure all this out. Depending upon what we receive from EL we may not need to request as much in fiscal funds from Student Affairs. Any light you can shine on how all this works is greatly appreciated. Everyone is completely confused about this including me!

>>

>> Thanks,

>>

>> Pam

Monica Gillie

From: Stephen Wren
Sent: Tuesday, February 23, 2016 12:17 PM
To: Monica Gillie
Subject: RE: EL Temecula Fee Money

Hi Monica,

Sorry for the delay.

The \$10,397 transferred into 1083 last year was revenue above and beyond what was budgeted at the beginning of the fiscal year. This year the fee is not collecting more than the original budget, which was allotted at the beginning of the fiscal year. Fee budgets are budgeted in their entirety at the beginning of the fiscal year. This causes me some confusion when seeing the credit and debit entry in 1083's budget.

SNCMP - Cal State San Marcos	2015	3	09/01/2015	0000769243	MJE - Manual Journal Entry	EL Reim for Temecula	(10,397.00)	660610 - SupSrv Unalloc DESE	48500 - TF Campus Operating Fund	1083 - SASS Career Center	***	***	***	-	0.00	***
SNCMP - Cal State San Marcos	2015	3	09/01/2015	0000769243	MJE - Manual Journal Entry	SupSrv DESE	10,397.00	660610 - SupSrv Unalloc DESE	48500 - TF Campus Operating Fund	1083 - SASS Career Center	***	***	***	-	0.00	***

In the meantime, you may want to reach out to Justin to see if he can account for those funds to transfer to 1083 from elsewhere in the Student Affairs' budget.

Also, after looking into this with Randy, we think a meeting with the three of us, plus Justin and Kathy Martin, would be a good idea to further clarify and establish how to proceed going forward. We can set up a meeting for the week of March 7th (after midyear and University Budget Committee items).

Thanks,
Stephen

Stephen Wren

Senior Budget Analyst
University Budget Office
California State University San Marcos
swren@csusm.edu
(760) 750-4467

From: Monica Gillie
Sent: Tuesday, February 23, 2016 8:49 AM
To: Stephen Wren
Subject: RE: EL Temecula Fee Money

Good Morning Stephen –