

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

(213) 590-5501

**Date:** July 2, 1986

**To:** Presidents

**From:** W. Ann Reynolds  
Chancellor

*W. Ann Reynolds*

**Subject:** Amendment of the Employee Fee Waiver and Reduction Program Under the New Fee Structure — Executive Order No. 491

Executive Order No. 401 covering the Fee Waiver and Reduction Program has been amended to include employees in the Management Personnel Plan.

Enclosed are five (5) copies of Executive Order No. 491. This Executive Order is effective immediately.

Section 11 of the Executive Order continues to assign responsibility to the Vice Chancellor, Faculty and Staff Relations, for review and evaluation of this program and for issuing directives to amplify and interpret these procedures. Any questions concerning the Executive Order should be directed to Dr. Caesar J. Naples, Vice Chancellor, Faculty and Staff Relations.

WAR:st

Enclosures

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

**Executive Order No.:** 491  
**Title:** Delegation of Authority and Procedures for the Administration of Fee Waivers and Reductions for Employee Training and Career Development  
**Effective Date:** July 2, 1986  
**Supersedes:** Executive Order No. 401

Pursuant to Sections 1 and 2 of Chapter III of the Standing Orders of the Board of Trustees of The California State University and Section 41804 of Title 5, California Administrative Code, I hereby delegate to the Presidents of The California State University or their designees the authority to admit for enrollment and to approve the waiver and reduction of fees for eligible employees who enroll in courses pursuant to the Procedures for the Administration of Fee Waivers and Reductions for Employee Training and Career Development which are amended, effective this date, for The California State University. A copy of these Procedures is attached to, and made a part of, this Executive Order.

  
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W. Ann Reynolds, Chancellor

**Date:** July 2, 1986

**PROCEDURES FOR THE ADMINISTRATION OF  
FEE WAIVERS AND REDUCTIONS FOR  
EMPLOYEE TRAINING AND CAREER DEVELOPMENT**

**1. Purpose:**

These procedures are for the purpose of implementing an employee fee waiver and reduction program in accordance with the authority granted the Trustees by Education Code, Section 89710 and to establish procedures for administration of the program pursuant to the delegation of authority to the Chancellor provided in Section 41804 of Title 5, California Administrative Code.

**2. Eligibility:**

All full-time or part-time permanent, full-time probationary employees, and full-time Management Personnel Plan employees, regardless of HEERA designation, may participate in the fee waiver and reduction program subject to authorization by the campus President or designee pursuant to these procedures. Full-time or part-time permanent employees, full-time probationary employees, and full-time Management Personnel Plan employees who are on an approved full or partial leave of absence with or without pay are also eligible. Employees covered by Section 42703(h) of Title 5, California Administrative Code (e.g., employees in programs of work relief or work training such as the Comprehensive Employment and Training Act referred to as CETA), graduate assistants, student assistants, full- or part-time temporary employees are not eligible. In cases where provisions of this Executive Order are in conflict with a Memorandum of Understanding entered into pursuant to the Higher Education Employer-Employee Relations Act, the Memorandum of Understanding shall govern with regard to those conflicting provisions for the individuals in the unit covered by the Memorandum of Understanding.

**3. Unit Limitations:**

In order to achieve a reasonable balance between an employee's regular work assignment and the course load taken under this program, approval for a waiver and reduction of fees shall be in accordance with the following course load unit limitations.

An eligible employee may be granted approval to enroll under this program for 2 courses or 6 units, whichever is greater, per semester or quarter.

An eligible employee who is on an approved leave of absence may enroll for units in excess of these amounts in accordance with the following schedule:

Percentage of Leave	Maximum Semester or Quarter Units
One-fourth but less than one-half	9
One-half but less than three-fourths	12
Three-fourths but less than full	15
Full	Not limited

**4. Admissions:**

Employees who qualify for admission to a campus in accordance with established standards and criteria shall be processed by the Office of Admissions and Records as regular admissions except that the application fee will be waived. Employees who do not qualify for regular admission to a campus may be admitted under the authority of Subdivision (e) of Section 41804 of Title 5, California Administrative Code as implemented in these procedures.

**a. Work-Related Courses:**

Admission for the purpose of enrolling in courses deemed work-related (necessary for improving skills for existing jobs) shall be with the approval of the President or designee and shall be only for the specified academic term. An employee enrolling in an approved work-related course shall be required to fill out only the front of Part A of the admissions application. The Office of Admissions and Records shall establish a file and Permanent Record Card for each employee admitted for this purpose, but the processes associated with matriculation (i.e., provision of transcripts of previous college level work, test scores, the evaluation of transfer credit, etc.) need not be carried out unless the employee subsequently declares an educational objective as part of an approved individual career development plan.

**b. Career Development Courses:**

Admission for the purpose of enrolling in courses as part of an approved individual career development plan at the CSU shall be with the approval of the President or designee. These employees shall be required to complete all the forms necessary for regular admission and matriculation at a campus of The California State University. The Office of Admissions and Records shall maintain the usual student records for employees admitted pursuant to this provision. Admission shall be continuous so long as the employee remains in good academic standing and maintains satisfactory progress toward the objectives outlined in the individual career development plan as judged by the President or designee.

**c. Intercampus Enrollments:**

In some instances employees may need to enroll on their own time at a campus other than the campus of employment. In such cases the campus of employment shall provide an employee with written certification that enrollment is authorized in accordance with this Executive Order and that the employee is enrolling for an approved work-related course or as part of an approved individual career development plan.

**d. Employees of the Office of the Chancellor:**

The Chancellor or designee shall provide employees of the Office of the Chancellor with written certification that enrollment is in accordance with the requirements of this Executive Order and that the employee is enrolling for an approved work-related course or as part of an approved individual career development plan. The campus of enrollment shall then follow the admissions procedure outlined in (a) and (b) of this section, as appropriate.

**e. Enrollment in Graduate Courses:**

Employees may enroll in graduate level courses subject to the same requirements as are provided in this Executive Order.

f. **Voluntary Participation:**

Employees participating in any course(s) under the fee waiver program that have not been mandated by their supervisor as a condition of employment or continuing employment shall be required to sign the following statement as a condition of taking a course(s) under fee waiver.

I am taking this course(s) under the CSU Fee Waiver Program on a voluntary basis and my participation is not mandated by my employer.

Signed:

Date:

5. **Fees:**

The following fees may be fully waived:

Application Fee  
Identification Card Fee  
Instructionally Related Activities Fee

The State University Fee may be waived for 2 courses or 6 units, whichever is greater, per term.

The following fees may be reduced to \$1.00 each:

Student Body Association Fee  
Student Union Fee  
Health Facilities Fee

All other fees shall be at the regular rates.

The fees for any units taken other than or in addition to units for which a fee waiver or reduction has been approved, including any work-related or career development units in excess of the limits indicated in Section 3, shall be the difference between (1) the full-time State University Fee, and (2) the part-time State University Fee; provided, that in no case shall the aggregate amount paid for a particular fee be greater than the amount which would have been charged if none of the units taken by the employee were under this program.

**Example 1:**

This example applies to all campuses and all employees under the fee waiver program governed by this Executive Order.

The employee enrolls for 2 courses or 6 units.

The State University fee is fully waived.

The following fees may be reduced to \$1.00 each:

Student Body Association Fee  
Student Union Fee  
Health Facilities Fee

**Example 2:**

This example applies to all campuses and all employees under the fee waiver program governed by this Executive Order.

The employee enrolls for 3 courses or more than 6 units.

Fees are waived for two of the courses that are justified as job-related or career development.

Take	3 courses	
Waive	2 courses	
Pay	1 course	\$120 semester
		\$ 80 quarter

Plus the following fees which may be reduced to \$1.00 each:

Student Body Association Fee  
Student Union Fee  
Health Facilities Fee

**6. Services:**

The appropriate campus authority may reduce the level of services except instructional services, which may be provided to employees who enroll under this program where the fees actually paid are below the fee levels normally charged.

**7. Course Approvals:**

The President or designee may approve the waiver and reduction of fees authorized by this Executive Order following determination by the President or designee that the course(s) for which the employee will enroll is (are) either directly related to the requirements of the employee's present position (job-related) or is (are) part of an approved individual career development plan in accordance with the criteria issued by the Office of Faculty and Staff Relations.

Approval to achieve a training and/or development objective through enrollment in courses under this program shall be given only after an analysis by the appropriate campus authority that a course enrollment is the most appropriate method of meeting that objective. Prior to approving a proposed course enrollment for an employee for whom previous enrollment has been approved, the evaluation referred to in Section 9 shall be completed.

**8. Records Requirement:**

The President or designee shall maintain records concerning the utilization of the fee waiver program. These records shall include the ethnicity and sex of participants, their occupational group, their salary level and other pertinent information necessary for a cost analysis of the program, a qualitative analysis concerning the effectiveness of the program and for other reporting requirements. Such records shall be maintained separately from the employee's official personnel records. Records of completed training activities should be retained in the employee's official personnel file.

**9. Evaluation:**

An evaluation shall be made at the close of each term of each employee's performance in courses taken under the fee waiver program. This shall include a review of the grade received for the course(s) taken. If the employee's performance in the course(s) is less than satisfactory, a review shall be made of the initial decision to use the program to meet the specific training or development requirement. Periodic progress reviews shall be held with each employee to determine whether reasonable progress is being made toward the achievement of the goals outlined in the employee's individual career development plan. Unsatisfactory performance in the course(s) or lack of progress toward the goals of an individual career development plan may be cause for withholding further approval for participation in the program. Courses taken on the fee waiver program shall be taken for credit and not audited. In addition to these individual reviews, there must be a periodic assessment of the benefit to the campus following the completion by employees of work-related courses.

**10. Funding:**

The establishment of this program carries no budgetary authorization for a campus to apply for or to receive additional funding. It is the responsibility of the campus to limit enrollment under the fee waiver program at a level which can be accommodated within existing campus resources.

**11. Supplemental Instructions:**

The Vice Chancellor, Faculty and Staff Relations, shall be responsible for review and evaluation of this program and for issuing directives to amplify and interpret these procedures.

**12. Effect of a Memorandum of Understanding:**

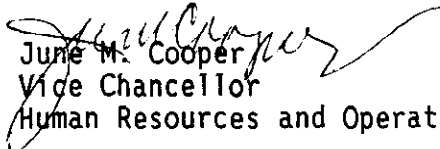
The provisions of this Executive Order shall apply to the employees specified in Section 2 except in cases where the provisions are in conflict with a Memorandum of Understanding entered into pursuant to the Higher Education Employer-Employee Relations Act. In such cases, the Memorandum of Understanding shall govern with regard to those conflicting provisions for the individuals in the unit covered by the Memorandum of Understanding.

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Office of the Chancellor  
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Long Beach, California 90802-4275  
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Code: TECHNICAL LETTER  
HR/Benefits 6600  
92-16

Date: July 21, 1992

To: Presidents

From:  June M. Cooper  
Vice Chancellor  
Human Resources and Operations

Subject: Fee Waiver - Executive Order 491

In the course of an audit review process, the Trustees' Auditor Staff informed us of problems with campus compliance with some fee waiver procedures. We extensively revised the procedures described in the Attachment to Executive Order 491 so current campus procedures match Executive Order requirements. A copy of Executive Order 491 and the revised Attachment are included here for your information.

JMC/lb

Attachments

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**Distribution:**

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