

THE CALIFORNIA STATE UNIVERSITY  
OFFICE OF THE CHANCELLOR



BAKERSFIELD

January 14, 2011

CHANNEL ISLANDS

**MEMORANDUM**

CHICO

**TO:** CSU Presidents

DOMINGUEZ HILLS

**FROM:** Charles B. Reed  
Chancellor

EAST BAY

**SUBJECT:** California State University Fee Policy

FRESNO

FULLERTON

**SUPERSEDES:** Executive Orders 1034 and 1042

HUMBOLDT

LONG BEACH

Attached is a copy of Executive Order No. 1054. The executive order brings together the California State University Board policies that comprise the CSU Fee Policy. This includes the philosophical statement on fees and educational costs, adopted by the Trustees in March 1993, entitled "Policies for Pricing and Strategies for Paying" and the most recent Fee Policy statement approved in May 2010. The referenced items make up the overall strategic framework and guidelines for administration of CSU fees.

LOS ANGELES

MARITIME ACADEMY

MONTEREY BAY

The executive order also updates terminology to clarify the nomenclature associated with the various fees, and continues the range within which presidents are authorized to establish and adjust category III miscellaneous course fees.

NORTHRIDGE

POMONA

Each campus should modify all fee notifications and billings to students and their families to reflect the change in the tuition fee terminology.

SACRAMENTO

SAN BERNARDINO

This combined presentation of CSU Fee Policy can be found at the following Internet website: <http://www.calstate.edu/budget/student-fees/fee-policy/>. Subsequent modifications required for administration of this fee policy will be made via the website.

SAN DIEGO

SAN FRANCISCO

In accordance with the 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.

SAN JOSÉ

SAN LUIS OBISPO

SAN MARCOS

CBR/kp

SONOMA

Attachments

STANISLAUS

**THE CALIFORNIA STATE UNIVERSITY**  
**Office of the Chancellor**  
**401 Golden Shore**  
**Long Beach, California 90802-4210**  
**(562) 951-4700**

**Executive Order:** 1054

**Title:** The California State University Fee Policy

**Effective Date:** January 14, 2011

**Supersedes:** Executive Orders 1034 and 1042

This executive order is issued pursuant to Education Code Section 89035 and Board of Trustees Standing Orders, Section II, subsection i.

This executive order brings together the California State University Board policies that comprise the CSU Fee Policy, defines the change in terminology to tuition fees for some Category I fees, and continues the delegated range for the establishment and adjustment of Category III miscellaneous course fees.

**California State University, Policies for Pricing and Strategies for Paying**

In March 1993 the Board of Trustees adopted a strategic framework called “Policies for Pricing and Strategies for Paying,” making explicit the relationship between the state’s fiscal responsibility for providing funding for student access and the share of the educational costs to be assumed by students and their families. This policy statement outlined the principles under which the CSU would determine fee rates and maintain adequate financial aid resources for students.

**California State University Student Fee Policy**

In May 2010 the CSU Board of Trustees adopted the “CSU Fee Policy”, which establishes categories of fees and directs which entity has authority over them.

Category I fees are authorized by the Board of Trustees and charged at the same rate at all campuses. They currently include the following with the new titles effective as of this date:

**Basic:**

- Undergraduate Tuition Fee
- Credential Program Tuition Fee
- Graduate/Post Baccalaureate Tuition Fee
- Doctorate Tuition Fee

**Supplemental (per unit, in addition to basic tuition fees):**

- Professional Program Fee
- Non-Resident Tuition Fee

**Other:**

- Application Fee

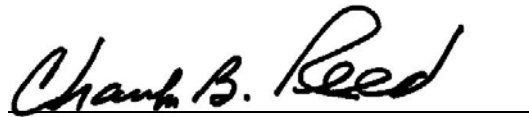
Each campus should modify all fee notifications and billings, in all formats, to students and their families to reflect these changes in the Category I fee terminology.

Other than the above-mentioned nomenclature changes, this executive order makes no changes to definition, authority, responsibility or accountability for Category I through Category V fees, and therefore these fee categories continue to be a part of the trustees' overall fee policy.

The range within which campus presidents may establish and adjust Category III miscellaneous course fees is unchanged and remains in effect under this executive order.

This update of CSU Fee Policy combines policy and administration of CSU fees into one reference document that can be found at the following Internet website:

<http://www.calstate.edu/budget/student-fees/fee-policy/> .

A handwritten signature in black ink that reads "Charles B. Reed". The signature is written in a cursive style and is positioned above a horizontal line.

Charles B. Reed, Chancellor

Dated: January 14, 2011

**QUALITY AND AFFORDABILITY:**

**POLICIES FOR PRICING AND  
STRATEGIES FOR PAYING**

**PREAMBLE**

One of the three policies that are the foundation of the California Master Plan for Higher Education is the maintenance of low fees. The other two are broad access to higher education for the citizens of California and wide availability of academic program offerings of high quality. Access and quality are the goals of California higher education, while the preservation of low fees has been an important means for achieving these goals. After several decades of extraordinary commitment to fulfilling the promise of the Master Plan, the current period of unprecedented economic stress in California has resulted in the state's inability to sustain its historic level of support to higher education. The question is whether the fundamental goals of the Master Plan for Higher Education can be continued, perhaps with less destructive modification to the basic policies, in a way that makes it possible to keep the essential promise to students and citizens of California.

It is imperative that we strive to retain our social contract because the return on the state's investment in the CSU can be readily measured in terms of benefits to the state and benefits to the individuals we serve. CSU is an instrument for preserving the essential moral commitment of constructive socioeconomic mobility. One of nine teachers for the country and three of four for the state are trained in the CSU. Eighty percent of those who receive a bachelor's degree in California, after transfer from a community college to a public university, graduate from a CSU campus. CSU faculty have defined the cutting edge of work in public policy analysis and applied research, key ingredients of California's healthy social transition. For all these benefits, the CSU definitions of quality and access must continue to include availability to newer constituencies and relatively low costs for those in need. These are the areas where the state must place its priority and align its policy direction. The clear focus must be on those who can pay and those who cannot, and on increased returns for California's investment.

One modification to basic policies is the adoption of pricing patterns for California public higher education which more nearly mirror the tuition and fee policies of similar institutions across the United States. Of course California always has been proud of its ability to provide more subsidy for all, than any other state but does anyone believe that this financial generosity is likely to prevail again? Therefore, this modification should provide for a predictable and reasonable adjustment of student fees from year to year so that students and their families are better able to plan for university attendance. It is equally important that a commitment to students is established on the part of the institution regarding what those fees will "buy". A rational framework for higher education pricing and financial aid might include measures and criteria which derive from

- institutional mission and priorities;
- differential costs associated with student level, objective, and enrollment status;
- incentives to improve access in terms of entry into the university system and shortening time to degree; and
- the considerable disparities of family income and wealth among those seeking California higher education.

Any long term fee and aid policy, particularly one that requires a greater average contribution on the part of students and their families, must assume a commitment on the part of the state to assume its share of

## The California State University Student Fee Policy

the partnership. The policies suggested here are predicated on not losing further ground in 1993/94 and beyond in state appropriations. The state's general revenue fund should pay for the access of additional students headed toward our universities. Thus, the only way to ensure a high level of student access in the short run is to recover a higher level of state appropriations.

Provision of adequate student financial aid and equitable application of aid policies would be a *central* tenet of a new and higher student pricing and aid structure. To mitigate an increase in fees becoming a barrier to access, a comprehensive program of student aid is imperative. A dramatic improvement in student aid is essential to meet the challenge of increasing disparity in family incomes in California which causes increasing disparity in students' ability to pay for college. A well defined set of policies for student financial aid must be linked directly to student fee policies. CSU is working with the University of California, the other segments of higher education, and relevant state agencies on a broader, long-term review of how California raises and allocates funds for aid.

### PRINCIPLES FOR A NEW PRICING STRUCTURE

- Fee Revenue Would Fund Improvements to the Direct Benefit of Students Attending CSU, While State Appropriation Funding Would Determine the Number of Students Who Could Attend CSU: The development of a new fee policy for students must be accompanied by a clarification of the responsibility of the state. The burden of ensuring that the state assumes its fundamental responsibility to provide adequate support for public higher education must remain with State policy makers. That responsibility is to provide access to higher education for its citizens by funding the operations of its universities, and that funding level determines how many students can be served. CSU enrollment levels have always been, and will continue to be, determined by the level of support provided by the state budget. Student fee revenues, in turn, can enhance the academic programs, improve the availability of courses, and facilitate student progress, but they cannot, and never should be expected to support increased access. It is also the intention of this policy that a portion of student fee revenues would fund the student aid increases necessary to meet increased need caused by the higher fees.
- Using Percentage of Cost of Education to Determine Amount of State University Fee (SUF): Students and their families should be charged a portion of the costs of education, as determined by a coherent and defensible policy, in the form of fees. California public institutions of higher education should establish a structure for tuition and fees that is more nearly comparable to that charged in other states with similar institutions.
- Differential Fees for Graduate /Postbaccalaureate) Study: Higher cost associated with graduate study should be *recognized* by the *fee* structure. Studies of education costs reveal cost differentials that are highly dependent upon the level and program of academic study, with master's degree programs costing more than undergraduate degree programs, and doctoral study costing substantially more than study at the master's level professional programs, especially those in the health sciences, *are* the most costly of all advanced degree programs. It is also possible to determine the relative differential costs for lower division and upper division undergraduate study and to establish fee levels that reflect this differential. This proposal envisions a specific exception to the policy of differential fees for postbaccalaureate education credential candidates, whose service is so essential to the future of California that the lower undergraduate fee structure, should continue for those students.

## The California State University Student Fee Policy

- Continue Fee Structures that Differentiate for Part-Time and Full-Time Study: The current fee structure for California State University establishes one fee for limited (6 units or less) and another fee for regular (more than 6 units) study. As the ceiling on the fee is increased and the policy altered to reflect costs, it is useful to maintain a fee structure that reflects the number of courses or student credit hours taken. This approach can be expanded to leave a fixed fee rate for students taking 12 units or more and instituting per unit charges for students taking fewer units. This type of fee structure contains incentives for students to improve their progress toward a degree. This in turn helps students to enter the workforce more rapidly and to become financially independent. As students accelerate progress to a degree, campus space becomes available for new students to enter the university. More incentives could be added to encourage students to increase their credit load each term.
- Clarify Meaning of Tuition: State law (Education Code Section 89703) limits CSU tuition for California residents to \$25 per year. It also limits the use of tuition revenues to instructional support. It is important to resolve these statutory problems so that revenues generated from increased student fees could support programs of instruction. The time has come to acknowledge formally that in order for public higher education to survive, the state and students of California must establish a partnership. That partnership would be grounded in the determination of "fair share" contributions towards educational costs. The historic commitment to low fees, regardless of economic status, cannot be sustained in light of the protracted problems of the state budget. Formally acknowledging this would lend credibility to any new policy approach, and allowing fee revenues to augment the instructional programs would increase accountability to students, their families, and state policy makers. It is therefore very important that policy makers remove the cap on tuition and/or remove the barrier to using student fee revenues to enhance instructional programs.

### PRINCIPLES FOR A PROGRAM OF STUDENT FINANCIAL AID

Several strategies comprise a comprehensive approach for students to manage the costs of college attendance. The primary strategy for the neediest of students is "gift aid" or grants of various sorts. As the economic means of students and their families increase, the strategies become more diverse and would include "self help aid" such as work study and student loans. Deferred payment strategies would also be used to help students spread the payment of fees across the term of study. The logical extension of this policy is that students from higher income families would no longer receive large subsidies from the state to attend college.

#### GRANTS:

- Establish Institutional Commitment to Student Grant Aid: The Trustees of the California State University have established a program of State University Grants, the purpose of which has been to provide assistance to needy students not adequately served by state and federal programs of student aid. In developing a new student fee structure for CSU, the role of Institutional grants should be reviewed. During the recent period of declining budget support to state student aid, CSU increased its commitment through the State University Grant program to fill the gap created by rising student fees and declining Cal Grants. In developing the policy framework for State University Grants, a number of criteria should be considered, including the following:
  - Provide a portion of fee revenues to augment the State University Grant program.
  - Provide grants to offset the fee Increase according to a student's family financial position.

## The California State University Student Fee Policy

- Combine grants and loans to ration limited funds and to "package" aid in accordance with CSU's mission.
- Assign priority to first-time freshmen and upper division community college transfers.
- Reform the State Program of Student Aid to be More Responsive to Student Need: The existing program of Cal Grants was formulated in an earlier period of California's history when fees at public universities were comprehensively low, and the major objectives of the Cal Grant programs were to recognize student achievement and to provide student choice. Financial problems for the neediest students have been further exacerbated by the rationing of reduced Cal Grant dollars to students on the basis of academic achievement in high school rather than on the basis of financial need. With the current state budget problems, funding for the Cal Grant programs has actually declined even though student fees have continued to increase, most dramatically at the California State University and University of California. Restoration of the full partnership with state and federal student aid programs should be a high priority for policy makers as it is for trustees. A reasonable balance of roles can and must be found.

Thus a comprehensive overhaul of the state program of student aid is essential to the development of a coherent structure of student fees. The primary goal of a revised public policy would channel student aid funds towards students with the greatest need. The intent of this policy goal is to expand the amount and type of financial aid available to all students in need. CSU is working with the University of California and private institutions in California to examine the public policy implications of new approaches to the provision of financial assistance and to re-examine guidelines regarding which students should be subsidized and for what purposes.

- Seek Adequate Funding and Full Eligibility for CSU Students from Federal Programs of Student Aid: Changes to the Higher Education Act through the reauthorization process have raised technical problems related to the level of grant eligibility for many CSU students. Restoration of *full* eligibility and full funding of federal student aid programs, especially the Pell Grant program, must be a high priority for CSU.

### LOANS AND SELF HELP:

- Federal and State Student Loan Programs: Increasing prices of higher education in California make the development of an array of loan programs for students imperative. CSU should explore the full potential for forgivable and low-interest loan programs. Among the potential programs are state and federal options that are tied to community service, to professions that are in high need, and regions of California that are underserved. Considerable emphasis should be given to a program of national service, which could provide an income contingent repayment loan to assist students that attend college and maximize employment opportunities in specified occupations or allow students to participate in service activities in return for a post-service benefit (such as an education grant). Exploratory conversations are underway with the state treasurer's office concerning the creation of a state trust program that would provide student loans.

### FINANCING OPTION:

- Deferred Payment Programs: CSU has recently developed a program which permits students to spread fee payments across the term of study. Further expansion of this and similar programs will assist students in managing the costs of college attendance (payment of fees by credit card would be a similar deferred payment approach).

### CONCLUDING COMMENT

The challenge faced by California State University and, indeed, by the state's policy makers, is how to achieve the goals of the Master Plan for Higher Education in a profoundly different environment than the one which spawned its great aspirations for California's citizens. The enlightened self interest of the state compels policy makers to focus upon the priority that must be accorded to providing the opportunity for Californians of every economic circumstance to gain the higher education they seek and for which they have earned. This priority for California is an economic imperative, if the state is to recover and sustain its economic strength and vitality. The goals of access and quality are the foundation of the Master Plan, and the centerpiece for the development of the California State University. The pursuit of new approaches to preserving these goals is the impetus for this policy framework.

The framework for changing pricing and financial aid policies to achieve quality and affordability of higher education in the CSU, is founded on a new reality for California - one that does not anticipate return to the circumstances of an earlier era. The underlying society that comprises the California of the 1990's reflects both richer diversity and greater disparity. The intent of this proposal is that the state subsidy would provide fundamental access to our university for students who meet the entry qualifications, and that our pricing policies would enhance the quality of their educational experiences. This policy is predicated on higher charges to students, offset by improved financial aid, and on sustained commitment by the state to fund a higher educational opportunity for CSU students.

Following this strategy, the state and the California State University together would direct financial support for the maximum social advantage, and would achieve through aggressive financial aid programs true opportunity for each individual student. Achievement of this goal will require a more effective and more comprehensive program of information and outreach on student financial aid than has ever before been implemented. This policy framework calls for a new partnership commitment from the students, the state and the university. Each is called upon to sacrifice and to innovate. The new direction is not pleasant, it is not easy, but the best among very difficult alternatives must be identified with candor and with courage.

**The California State University Student Fee Policy**  
(Fee Administration)

**I. Fee Policy Statement**

The CSU makes every effort to keep student costs to a minimum. Fees listed in published schedules or student accounts may need to be increased when public funding is inadequate. Therefore, CSU must reserve the right, even after initial fee payments are made, to increase or modify any listed fees, without notice, until the date when instruction for a particular semester or quarter has begun. All CSU listed fees should be regarded as estimates that are subject to change upon approval by the Board of Trustees, the Chancellor, or the Presidents, as appropriate.

**II. Definitions**

- A. Category I Fees – Systemwide mandatory tuition fees and other 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.

**III. Authority**

- A. The Board of Trustees provides policy guidance for all matters pertaining to student fees and has 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 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 fees, and for the oversight and adjustment of Category II and III fees. The president is not delegated authority to establish Category I fees, 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.

**IV. Responsibility**

- A. The president is responsible for assuring that appropriate and meaningful consultation occurs prior to adjusting any campus-based fee and before requesting that the chancellor establish a new Category II or Category III fee.

## The California State University Student Fee Policy

1. The president shall establish a fee advisory committee comprised of student, faculty, staff, and administrative representatives to provide advice to the 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.
  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 requesting that the chancellor establish any Category II or III fees (subject to his/her approval in writing).
    - 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 Category II 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.
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. The president, however, may waive the referendum requirement (unless it is required by Education Code) if he/she 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.

## The California State University Student Fee 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. 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.
  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, unless education code requires that the referendum pass.
- 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 will be developed with input from the student body association and the fee advisory committee to ensure that the process is transparent, and meaningful, and will 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 many 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.

## The California State University Student Fee Policy

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.

### V. 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 balances should be included. 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.

Miscellaneous Course Fee Policy

**Policy Statement:** 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 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.

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 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, tuition fee revenue, and permanent base budget allocations.

**Approved Fee Ranges:**

<b>\$0-\$150</b>	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.
<b>\$0-\$3,000</b>	Fees for courses that require field trips or travel off-campus in order to meet the educational objectives of a given course.

**Category I Per-Unit Fee in Graduate Professional Business Programs**

1. Establishment and Terms of Fee Assessment

**1.1 Effective Date**

Effective fall 2009 a Category I per-unit fee in state-supported professional graduate business programs shall be implemented as provided for in this executive order.

**1.2 Applicability**

1.2.1 The Graduate Business Professional Fee shall be charged on a per-unit basis for all required courses in state-supported professional master of business degree programs that are subject to accreditation by the Association to Advance Collegiate Schools of Business International (AACSB International) and that are authorized by the trustees or chancellor to assess such fees.

1.2.2 Students in conditionally classified admission status in graduate professional programs shall be charged the Graduate Business Professional Fee on a per-unit basis for each prerequisite course taken in fulfillment of graduation requirements for these fee-authorized programs.

1.2.3 Programs authorized as of the issuance of this policy to assess these fees to enrolled students are listed on Attachment 1 to this executive order.

**1.3 Assessment of Fees**

1.3.1 This fee shall be in addition to the State University Fee, applicable non-resident tuition, and any campus-based fees.

1.3.2 This fee shall be assessed in the amount of \$210 per semester unit or \$140 per quarter unit.

**1.4 Fee Waivers**

Employee fee waivers and other fee waivers are authorized by statute. The terms of authorized employee fee waivers are subject to change and are agreed upon as outlined in collective bargaining contracts. Please consult current Human Resources Technical Memoranda at <http://www.calstate.edu/HRAdm/memos.shtml>

2. Establishing Fees in Additional Applicable Programs

Upon request of a campus president, the chancellor is authorized to approve the assessment of a Graduate Business Professional Fee upon students enrolled in state-supported professional master's degrees in business that are subject to accreditation by the Association to Advance Collegiate Schools of Business International and that are not included in the original roster of fee-authorized programs.

3. Fee Revenue

In accordance with Education Code Section 89721(1), revenue collected from all higher education fees shall be deposited in a local trust unless otherwise specified.

## The California State University Student Fee Policy

### 4. Provision for Financial Aid

Presidents are directed to set aside a minimum of 25% and not more than 33% of the Graduate Business Professional Fee revenue for need-based financial aid, with such funds to be used first to meet the demonstrated financial need of students in affected campus professional graduate degree programs in business; and that any part of the revenue that is not awarded to professional business master's degree program students be made available to meet demonstrated financial need of any other undergraduate or graduate students on the campus.

### 5. Modification of Existing Fees

Beginning in fall 2010, for each adjustment made by trustee action to the State University Fee for graduate students, an equal adjustment will be made to the graduate professional business Category I fee.

### 6. Accountability

In the 2011-12 fiscal year, campuses shall report to the chancellor on their progress in addressing the following expectations of the Board of Trustees.

6.1 Enrollment growth in professional master's degree programs in business, consistent with campus strategic plans.

6.2 Growth in enrollment diversity in such programs, including improved representation of persons of modest financial means, improved representation of persons from currently underrepresented groups, and a more balanced gender representation among students.

6.3 Support for students through such means as providing internships and placement assistance at the completion of their graduate business programs.

6.4 Improvements in faculty recruitment and retention rates.

6.5 For programs that seek accreditation by the Association to Advance Collegiate Schools of Business International, maintenance of accredited status.

## The California State University Student Fee Policy

### **Programs Authorized to Assess Per Unit Fee in State-Supported Professional Business Graduate Programs**

Authority: CSU Trustee Resolution RFIN 05-09-03  
May 12-13, 2009

#### **MS Accountancy**

CSU Fresno; CSU Fullerton; CSU Los Angeles; Cal Poly Pomona; CSU San Bernardino; San Diego State; San José State; Cal Poly San Luis Obispo

#### **MBA Master of Business Administration**

CSU Bakersfield; CSU Chico; CSU Dominguez Hills; CSU East Bay; CSU Fresno; CSU Fullerton; Humboldt State; CSU Long Beach; CSU Los Angeles; CSU Northridge; Cal Poly Pomona; CSU Sacramento; CSU San Bernardino; San Diego State; San Francisco State; San José State; Cal Poly San Luis Obispo; CSU San Marcos; Sonoma State; CSU Stanislaus

#### **MS Business Administration**

CSU East Bay; CSU Los Angeles; Cal Poly Pomona; San Diego State; San Francisco State; CSU Stanislaus

#### **MS Health Care Management**

CSU Los Angeles

#### **MS Business and Technology**

Cal Poly San Luis Obispo

#### **MS Information Systems**

CSU Fullerton; CSU Los Angeles

#### **MS Taxation**

CSU East Bay; CSU Fullerton

**TRUSTEES RESOLUTION**

**Meeting Quality Standards in State-Supported Professional Business Graduate Programs with Revenue Support Derived from a Per-Unit Fee (RFIN 05-09-03)**

**RESOLVED**, By the Board of Trustees of the California State University, that beginning with the fall term, 2009, a Graduate Business Professional Fee shall be assessed to students for coursework required in state-supported professional master's of business degree programs that are subject to accreditation by the Association to Advance Collegiate Schools of Business International (AACSB International). This fee shall be in addition to the State University Fee and any campus-based fees, and shall be assessed in the amount of \$210 per semester unit or \$140 per quarter unit. The Graduate Business Professional Fee shall apply to required courses in the following degree programs: Master of Business Administration (M.B.A.); and Master of Science (M.S.) programs in Accountancy, Business Administration, Health Care Management, Business and Technology, Information Systems, and Taxation; and be it further

**RESOLVED**, that beginning in fall 2010, whenever the trustees take action to adjust the State University Fee for graduate students, the same adjustment will be made to the Business Professional Fee; and be it further

**RESOLVED**, that presidents are directed to set aside a minimum of 25% and not more than 33% of the Graduate Business Professional Fee revenue for need-based financial aid, with such funds to be used first to meet the demonstrated financial need of students in campus professional graduate degree programs in business; and that any part of the revenue that is not awarded to professional business master's degree program students be made available to meet demonstrated financial need of any other undergraduate or graduate students on the campus; and be it further

**RESOLVED**, that the Board of Trustees expects that, with this additional revenue made available to campuses, professional master's degree programs in business will show growth in enrollments consistent with campus strategic plans; enrollment diversity that includes improved representation of persons of modest financial means, and of persons from currently underrepresented groups, and a more balanced gender representation; support for students at the completion of their programs through such means as internships and placement assistance; improvements in faculty recruitment and retention success; and for programs that seek it, success in maintaining accredited status with the Association to Advance Collegiate Schools of Business International; and be it further

**RESOLVED**, that upon request of a campus president, the chancellor is authorized to approve the assessment of a Graduate Business Professional Fee upon students enrolled in other newly-developed state-supported professional master's degrees in business that are subject to accreditation by the Association to Advance Collegiate Schools of Business International; and be it further

**RESOLVED**, that the chancellor provide the Board of Trustees an accountability report in the 2011-12 fiscal year that is responsive to these board expectations.

**California State University Education Doctorate State University Fee – Independent Educational Doctoral Degree Program**

1. A new fee will be established as the CSU Education Doctorate State University Fee and will be charged in lieu of the CSU State University Fee for students enrolled in the Education Doctorate Program.
2. The fee structure will be a modified version of the State University Fee structure. Regular student fees will be defined as the fee rate for students enrolled in the Education Doctorate Program independent of number of units. Limited student fees will not apply to the Education Doctorate Program. Regular student fees will be equal to the full academic year fee rate. The summer term fee rate shall equal the academic year term rate regular students are charged, respectively, at semester or quarter campuses.
3. The CSU Education Doctorate State University Fee rate will be linked to the UC graduate fee rate (or their Education Doctorate fee rate if a separate professional fee is so established in the future). Increases in the CSU Education Doctorate State University Fee will be tied to the percentage increase in the UC graduate fee. For the 2007-08 academic year the fee level will be the adjusted rate based on the 2006-07 University of California fee of \$6,897 - the amount reflecting the graduate mandatory fees approved by the University of California Regents for the 2007-08 academic year.
4. Because of the limited needs-based financial aid requirement for education doctorate student enrollments, the financial aid set-aside from student fees will be 10 percent of the academic year fee rate. After need-based aid has been provided, any remaining funds from the set-aside would be used for general program purposes or student support.
5. Employee fee waivers will have to be negotiated for the new fee and the cost for the waiver shall be funded from the employee compensation pool for each bargaining unit and non-represented employees.
6. The trustees will annually approve the academic year fee rate for the program.
7. Students enrolled in the Education Doctorate Program will also pay campus-based mandatory fees.

## The California State University Student Fee Policy

### California State University Education Doctorate State University Fee – Independent Educational Doctoral Degree Program (RFIN 11-06-09)

**RESOLVED**, By the Board of Trustees of the California State University, that the CSU Education Doctorate State University Fee is hereby established, which shall be authorized at a fee level that equals the graduate student fee (or Education Doctorate fee rate if a separate professional fee is so established in the future) at the University of California; and, be it further

**RESOLVED**, That the fee rate approved for the 2007-08 academic year the fee level will be the adjusted rate based on the 2006-07 University of California fee of \$6,897 - the amount reflecting the graduate mandatory fees approved by the University of California Regents for the 2007-08 academic year; and be it further

**RESOLVED**, That the chancellor may approve individual campus CSU Education Doctorate State University Fee rates that do not exceed the maximum graduate fee rates charged by the University of California, and be it further

**RESOLVED**, The chancellor is delegated authority to further adopt, amend, or repeal the CSU Education Doctorate State University Fee rate if such action is required by the budget act approved for 2007-08, and that such changes made by the chancellor are communicated promptly to the trustees.