

THE CALIFORNIA STATE UNIVERSITY
Office of the Chancellor
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Date: April 13, 2000
To: Campus Presidents
From: Charles B. Reed 
Chancellor
Subject: Executive Order No. 740, The California State University Student Fee Policy

The Board of Trustees approved a revised student fee policy at the March 14-15, 2000 meeting. I am transmitting a copy to you of Executive Order No. 740, The California State University Student Fee Policy. This executive order supercedes Executive Order 661 regarding fees, rates, and charges.

The revised student fee policy changes fee categories and definitions, requires each campus to develop a fee referenda process, and eliminates the one-third financial aid requirement associated with future campus fee increases while retaining the one-third financial aid requirement for the State University Fee.

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.

Attachments

Distribution: Vice Chancellors
Campus Presidents

THE CALIFORNIA STATE UNIVERSITY
Office of the Chancellor
401 Golden Shore
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Executive Order No.: 740

Title: The California State University Student Fee Policy

Effective Date: April 13, 2000

Supersedes: Executive Order No. 661

This Executive Order is issued pursuant to resolution of the Board of Trustees of the California State University RFIN 03-04-00, a copy of which is included as **Attachment 1**. The revised California State University Student Fee Policy included as **Attachment 1A** defines fee categories, and establishes authority, responsibility, and accountability with regard to CSU student fees. Further, CSU student fees are authorized, deposited, and refunded in accordance with applicable provisions of the law, and revenue bond indentures which may be outstanding.

The following provides The California State University Student Fee Policy highlights and actions required by this executive order:

Definitions

This fee policy defines fee types as Category I, Category II, Category III, and Category IV. Category I fees must be paid to apply to, enroll in, or attend the university. This category includes fees that are required upon student registration. Category II fees pay the full cost of instruction required of some students by statute, which includes the nonresident tuition fee. Category III fees are paid to receive materials, services, or for the use of facilities provided by the university, or to enroll in a course offered through a self-support instruction program. This category includes miscellaneous course fees and material, services and facilities fees, unless those fees must be paid to apply to, enroll in, or attend the university. Category IV fees reimburse the university for additional costs resulting from dishonored payments, late submissions, or misuse of property or as a security or guaranty. **Attachment 2** of this Executive Order provides additional examples of fees in each category, which may be helpful in implementing the fee policy.

Authority

The Board of Trustees provides policy guidance for all matters pertaining to student fees. The board retains authority to establish, adjust, and abolish systemwide fees. The chancellor is delegated authority to establish new campus fees. Campus presidents are delegated authority to adjust or abolish campus fees.

Responsibility

Appropriate and meaningful consultation must occur before increasing or requesting the chancellor to establish campus fees. Appropriate and meaningful consultation includes consultation with the campus fee advisory committee prior to increasing and establishing campus fees, and to increase or establish Category I fees, the fee policy also requires that an advisory student referendum be conducted. Alternative consultation mechanisms are permitted if they can be demonstrated to be more effective in achieving appropriate and meaningful consultation. Alternative consultation mechanisms are not permitted in the following three instances: (1) before initially establishing a student body association fee, a student body organization is required to be approved by two-thirds favorable vote of the students (Education Code §89300); (2) before adjusting (increasing or decreasing) a student body association fee, a fee referendum approving the adjustment is required (Education Code §89300); and (3) before initially establishing a student body center fee, a fee referendum approving the fee by two-thirds favorable vote is required (Education Code §89304).

This fee policy requires that each campus develop a student fee referendum process. Some general guidelines for the fee referendum process are outlined in Attachment 1A. The referendum process for establishing and rescinding the student body association fee is described in section 41401 et seq. of Title 5 of the California Code of Regulations.

This fee policy eliminates the financial aid requirement associated with campus mandatory fees. This revision to the fee policy does not require any changes to existing commitments made to financial aid nor does it preclude the consideration of financial aid consequences associated with future student fee adjustments. The one-third financial aid requirement associated with increases in the systemwide State University Fee is retained.

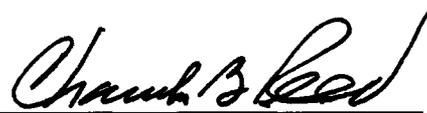
With the discontinuation of the campus fee financial aid requirement, campus presidents are encouraged to evaluate the level of existing campus fees charged to students that contain a financial aid component and, as appropriate, consider the following options:

- (1) maintain the fee level and corresponding financial aid support resulting from the campus fee;
- (2) reduce the fee level after removing financial aid component from the campus fee; or
- (3) adjust fee components, thereby maintaining current fee level and shifting the portion of the fee collected for financial aid to other purposes for which the fee is collected.

Prior to reducing fee levels or adjusting fee components due to change in financial aid, consultation with campus student fee advisory committee should occur. Before adjusting (increasing or decreasing) a student body association fee, a fee referendum approving the adjustment is required (Education Code §89300).

Accountability

In accordance with this policy, each campus is required to report to the chancellor for the most recently completed fiscal year a complete inventory of all fees charged to students and the total revenue collected for each fee.



Charles B. Reed
Chancellor

Dated: April 13, 2000

The California State University Student Fee Policy, with copies of the Board resolution, this executive order, attachments, and an "Index of Fees" will be posted to:
http://www.calstate.edu/tier3/budget/FeeEnrll_Info/FeeInfo/FeeIndex.html.
The Index of Fees includes additional information (e.g. statutory authority) for fees in each category that includes references to Education Code sections applicable to fee deposit requirements and authorized fee waivers.

Student Fee Policy (RFIN 03-04-00)

RESOLVED, By the Board of Trustees of the California State University, that Attachment 1 to Agenda Item 2 of the March 14-15, 2000, meeting of the trustees' Committee on Finance, titled "The California State University Student Fee Policy" is approved and shall take effect immediately; and be it further

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

The California State University Student Fee Policy

I. Definitions

- A. Category I fees - Fees that must be paid to apply to, enroll in, or attend the university.
- B. Category II fees - Fees to pay the full cost of instruction required of some students by statute.
- C. Category III fees - Fees, other than Category I fees, paid to receive materials, services, or for the use of facilities provided by the university, or to enroll in a course offered through a self-support instructional program.
- D. Category IV fees - Fees or deposits to reimburse the university for additional costs resulting from dishonored payments, late submissions, or misuse of property or as a security or guaranty.

II. Authority

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

III. Responsibility

- A. The president is responsible for assuring that appropriate consultation occurs prior to adjusting any fee and before requesting the chancellor to establish a new fee. This authority is subject to the accountability requirements described below in Section IV.
 - 1. The president shall establish a fee advisory committee comprised of student, faculty, staff, and administrative representatives to provide advice to the campus president.
 - 2. The president shall consult with the committee before adjusting any fee and before requesting the chancellor to establish a new fee including a consolidation of existing fees.

3. A statement of revenues and expenditures including a minimum of one year of actual costs and two years of projected revenue and expenditures for the fee revenue supported activity shall be developed by the campus chief financial officer and considered by the campus fee advisory committee prior to the campus president adjusting fees or requesting the chancellor to establish a new fee.
 4. Membership of the advisory committee shall be established in consultation with the campus 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.
 5. Students appointed by the campus student body association shall constitute a majority of the voting members of the committee.
 6. The campus president shall appoint members to the 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 serve on similar committees.
 7. The president shall appoint the chair of the committee.
- B. Appropriate consultation with campus constituencies regarding charging fees and allocating fee revenue is critical to assure that the delegated authority is exercised in a manner that is consistent with policies adopted by the board.
1. Appropriate and meaningful consultation includes consultation with bodies such as the campus faculty senate, the campus student body association and, to adjust or establish Category I fees, an advisory student referendum.
 2. The policy presumes that a student referendum will be conducted before adjusting or establishing Category I fees. However, the president may waive the referendum requirement if the president determines that a referendum is not the best mechanism to achieve appropriate and meaningful consultation. If a referendum is not conducted prior to adjusting Category I fees or requesting the chancellor to establish a new Category I fee, the president must demonstrate to the chancellor why alternative consultation methods selected were more effective in complying with this policy.
- C. An advisory student referendum is required prior to adjusting a campus Category I fee or requesting the chancellor to establish a new campus Category I fee and 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 campus shall fund costs associated with the referendum.

2. The results of the referendum shall be advisory to the committee and the president.
3. The 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.
4. The results of a student fee referendum shall be considered favorable when a majority of students voting approve the fee action.
5. The committee shall issue a voter pamphlet providing objective analysis of the proposed fee action and statements solicited by the committee for and against the proposed fee action.
6. The committee shall determine the specific statements that shall be included in the pamphlet.
7. Copies of the voter pamphlet and ballot and information regarding the dates, times, and polling locations shall be available to students and published in the campus newspaper at least thirty days prior to the referendum.

IV. Accountability

- A. Total annual Category I fees may not exceed one-third of the systemwide cost of education. The systemwide cost of education is defined as total support expenditures (State University Fee revenue and General Fund support appropriations) divided by the number of full-time equivalent students.
- B. Each campus shall report to the chancellor for the most recently completed fiscal year a complete inventory of all fees charged to students, and the total revenue collected for each fee. The fee report will be presented to the board by the chancellor to allow the board to consider the level and range of fees charged to students.

Category I Fees

Fees that must be paid to apply to, enroll in, or attend the university.

Examples

Application Fee (systemwide fee)
Campus Service (ID) Card Fee
Freshman Orientation Training Fee
Health Facilities Fee
Health Services Fee
Instructionally Related Activities Fee (Category I, for example, if required campus wide)
Materials, Services, and Facilities Fee (Category I, for example, if required campus wide)
Miscellaneous Course Fee (Category I, for example, if required campus wide)
State University Fee (systemwide fee)
Student Body Association Fee
Student Body Center Fee

Authority to establish and adjust

The Board of Trustees may establish and adjust Category I systemwide fees.

The chancellor may establish Category I campus fees.

The president may adjust Category I campus fees.

Process to establish Category I campus fees

Consideration by the campus fee advisory committee is required.

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

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

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

Process to adjust Category I campus fees

Consideration by the campus fee advisory committee is required.

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

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

Category II Fees

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

Example

Nonresident Tuition

Authority to establish and adjust

The Board of Trustees may establish and adjust Category II fees.

Process to establish

Resolution by the Board of Trustees.

Process to adjust

Resolution by the Board of Trustees.

Category III Fees

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

Examples

Alumni Placement Fee
American Dietetics Association Transcript Evaluation Fee
Anthropology 140, Irish Travel Study Fee

Assessment of Body Composition and Physical Fitness Fee
Bicycle Storage Fee
Campus General Catalog Fee
Conference, Short Course Institution Fee
Dietetic Internship Evaluations
Diploma Fee
Distance Learning Fees
Evaluation for Credential Candidate Fee
Extension Course Fee
External Degree Fee
Fingerprinting Services Fee
Freshman Orientation Lodging & Food Service
Graduate Student Orientation Program Fee
Graduation Fee
Housing Fee
Installment Fee
Laptop Rental Fee
Letter of Reference Collection Service Fee
Lock and Locker Fee
Materials, Services and Facilities Fee (if not required to apply to, enroll in, or attend the university)
Miscellaneous Course Fees (if not required to apply to, enroll in, or attend the university)
Music Studio Course (Extension/Summer) Fee
Musical Instrument Repair and Insurance Fee
Off-campus Study Program Fees (travel/field trip fees)
Organ Practice Fee
Parking Fee
Recreation Facilities Fee
Rodeo Program-Pen Rental & Practice Fees
Service Enabling Device
Software Rental Fee
Special Examination Fee
Special Session Fee
Student Academic Services Fee
Summer Session Health Facilities Fee
Summer Session Fee
Telephone Fee
Test Materials Fee
Thesis Binding Fee
Transcript of Record Fee
Uniform Fee
University One-Card Services Fee

Authority to establish and adjust

The chancellor may establish new Category III fees.

The president may adjust Category III fees.

Process to establish

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

After consideration by the campus fee advisory committee, the president may request the chancellor to establish the Category III fee. Some Category III fees, such as continuing education fees, may be established due to changing market conditions in advance of consultation with the campus fee advisory committee, however, consultation must follow.

Process to adjust

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

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

Category IV Fees

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

Examples

Career Center Resource Library Fines
Check Return Fee
Credential Late Fee
Credit Card Transaction Voucher Dishonored Fee
Damage Deposit Fee
Delayed Transmittal Fee
Enrollment Confirmation Deposit
Failure to Meet Administrative Appointment Fee
Identification Card Replacement Fee
Item Lost or Broken Fee
Laptop Penalty Fee
Late Registration Fee
Library Fee
Literacy Resource Lab Fines
Music Department Library Fee
Replacement of Lost Parking Permit Fee
Residence Room Lockout Charge
Software Deposit
Software Damage Fee

Authority to establish and adjust

The chancellor may establish new Category IV fees.

The president may adjust Category IV fees.

Process to establish

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

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

Process to adjust

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

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