



Introduction to Campus Fees

**SFAC/IRA Orientation
Sonoma State University
September 20, 2019**

Sonoma State University Committee

- EO 1102 established our baseline
- SSU can elaborate our own structure
- As of 2017-18, SSU established the Fee Advisory Committee (now referred to as the *Student Fee Advisory Committee*) and a sub-committee to focus on the allocation of Instructionally Related Activities funds
 - Allows for continued focus and monitoring of IRA Funds
 - Allows for adequate time to address Category III fees and non-IRA Category II Fees

The Student Fee Advisory Committee

- Developed in accordance with Executive Order (EO) 1102 (section IV.A.I)
- Advisory to the President (who is delegated authority for the oversight and adjustment of Category II & III fees)
- Focus is on Category II – V fees (appropriate & meaningful consultation)
 - Review Category II & III proposals for fee implementation or changes
 - Review Category IV & V fees (informational)
- Working body for a student related fee referendum (more later)

Student Fee Advisory Charge and Membership

- Charge: To provide advice to the President on Category II & III fees.
- Membership (there are 9 voting members):
 1. AS President or designee
 2. AS Exec VP or designee
 3. AS VP of Finance or designee
 4. Student at large appointed by AS
 5. Student at large appointed by AS
 6. Chair of Academic Senate or designee
 7. Provost or designee
 8. VP of Administration and Finance or designee
 9. VP for Student Affairs or designee
- SSU President appoints Co-chairs: Arden Childers and Elias Lopez for 2019/20

IRA Committee

- Charge: Allocate and account for IRA Fee one time allocations
- Membership (there are 7 voting members):
 1. AS Exec VP
 2. AS VP for Finance or designee
 3. 2 students at Large appointed by AS
 4. 3 faculty member appointed by the Academic Senate
- The AS Executive VP – Melissa Kadar serves as Chair and Student Affairs provides staff support: Anna Reynolds-Smith and Christina Gamboa

Overview of Fees

Fee Policies

- There are several laws and policies that dictate how fees are structured within the CSU:
 - [California Education Code](#)
 - [California Code- Title 5](#)
 - [CSU Student Fee Policy – Executive Order 1102](#) (EO 1102)
 - Encompasses 1993 CSU Board of Trustees State University Fee Policy
 - Continues the practice of seeking the advice of Student Fee Advisory Committees combined with student referenda and/or alternative consultation processes
- Each campus submits an annual Student Fee Report to the Chancellor's Office

Categories of Fees

Category I Fees

- Category I Fees are systemwide mandatory fees, which are charged at the same rate and for the same purpose at all campuses
- These fees are controlled by the Board of Trustees. The Chancellor or Presidents cannot establish or adjust these fees unless specifically designated to do so by the BOT

Category I Fees

Examples of Category I Fees are:

- Tuition Fee
- Non-Resident Tuition Fee
- Application Fee
- Professional Program Fee

Category II Fees

- Category II Fees are mandatory fees, which are required to attend the University, but may vary across campuses
- The Chancellor is delegated authority to *establish or adjust* these fees. Once a fee is established, Presidents are then further delegated to *adjust* these fees
 - The President is responsible for assuring that appropriate and meaningful consultation occurs before adjusting fees. This consultation may manifest itself through advisory student referendum or the alternative consultation process
- At SSU, all of the Campus Based Fees (CSU Category II fees) are subject to increase each academic year based on the Bay Area Consumer Price Index (CPI) (following 2001 student referendum)

Category II Fees

- Examples of Category II Fees are:
 - Health Services and Health Facilities Fee
 - Associated Students Fee
 - Instructionally Related Activities Fee

Category III Fees

- Category III Fees are miscellaneous course fees for state-support instruction.
- The Chancellor is delegated authority to *establish or adjust* these fees. Once a fee is established, Presidents are then further delegated to *adjust* these fees
 - The President does have limited authority to establish Category III fees within a range pre-established by the Chancellor
 - Before establishing or adjusting these fees, the president must seek consultation from the campus Student Fee Advisory Committee

Category III Fees

- Examples of Category III Fees are:
 - Art Studio Fees
 - Chemistry Lab Fee
 - Field Trip Fee
 - Nursing Skills Lab Fee

Category IV Fees

- Category IV Fees are fees paid for services, use of facilities, or fines that are collected through state-supported operations
- The President has the authority to *establish, oversee, and adjust* this category of fees
 - In order to establish or adjust Category IV Fees, SSU practice is that a university department must submit a proposal to both the President and Student Fee Advisory Committee.

Category IV Fees

- Examples of Category IV Fees are:
 - Library Overdue Fees
 - ID Replacement Fee
 - Orientation Fees

Category V Fees

- Category V Fees are fees charged by self-support operations on campus
- The campus has the authority to *establish, oversee, and adjust* this category of fees
 - Each self-support has a different process to establish, oversee, and adjust fees
- All revenues collected must be used to support and develop new activities within the self-support fund

Category V Fees

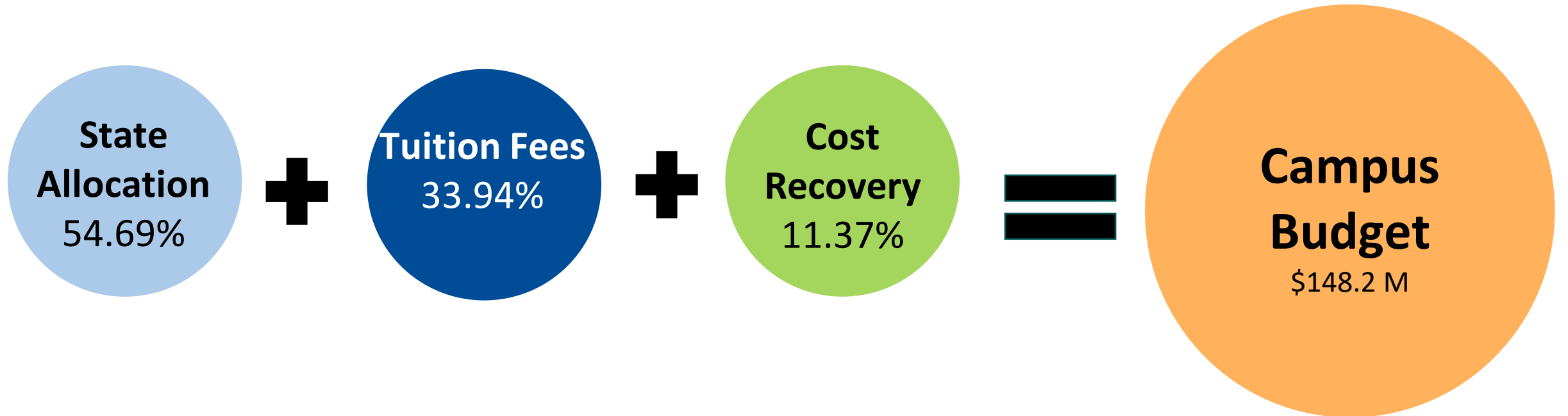
- Examples of Category V Fees are:
 - Housing Fees
 - Extended Ed Fees
 - Parking Fees



2019-2020 Campus Budget

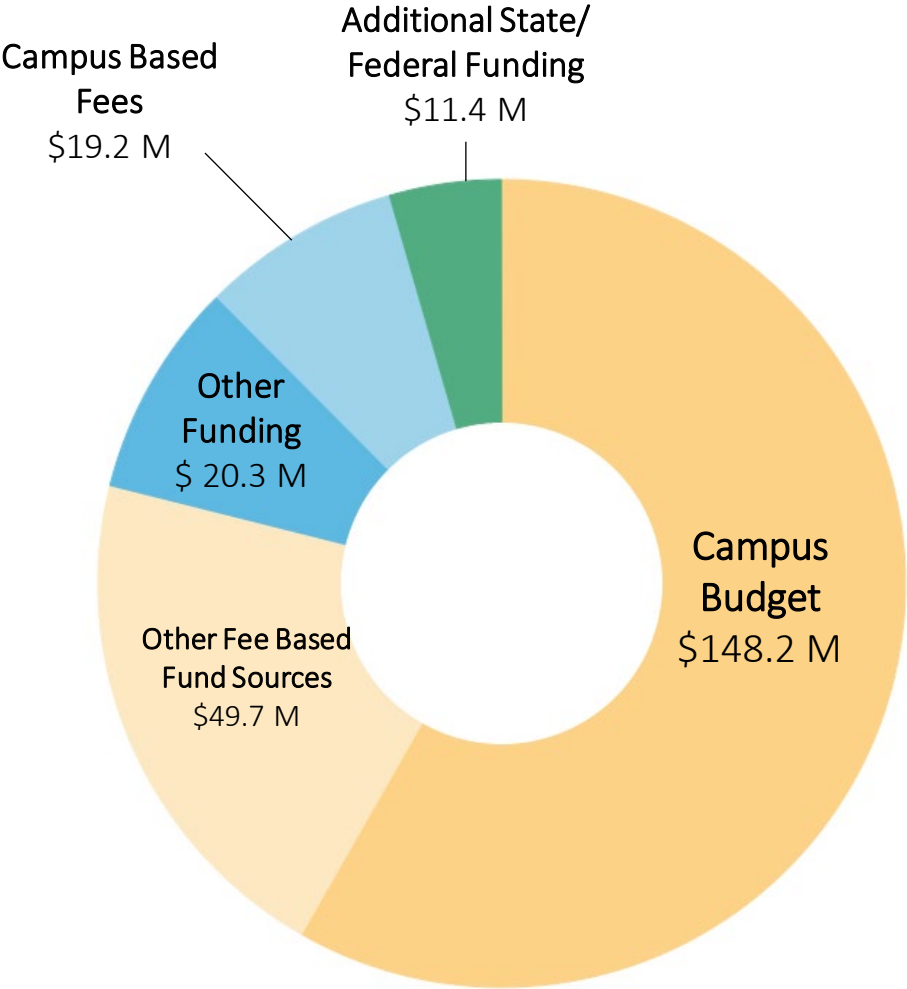


Campus Budget Composition



Total 19/20 Campus Budget: \$ 148,172,773

2019-2020 University Budget Revenue



Source	Total	
Campus Budget	\$ 148,173,773	59.6%
Additional State/Federal Funding		
Office of Research and Sponsored Programs	10,499,412	
Lottery	905,000	
	<u>11,404,412</u>	4.6%
Campus-Based Fees		
Associated Students	2,929,624	
Campus Union	8,374,441	
Center for Performing Arts	661,220	
Counseling and Psychological Services	1,047,490	
Instructionally Related Activities	559,813	
Intercollegiate Athletics	2,587,111	
Library	260,166	
Student Health Center	2,818,401	
	<u>19,238,266</u>	7.8%
Other Fee Based Fund Sources		
Housing	37,596,708	
School of Extended and International Education	9,060,000	
Transportation and Parking Services	3,027,900	
	<u>49,684,608</u>	20.0%
Other Funding		
Green Music Center	3,635,865	
Sonoma State Enterprises	16,145,422	
Foundation General Fund	477,500	
	<u>20,258,787</u>	8.0%
Total Operating Fund Resources	<u>\$ 248,759,846</u>	100.0%



Campus Fee Support & Resources



University Budget and Planning Office

- The University Budget and Planning Office (UBPO) primarily manages revenue associated with Category I, II, and V fees
- UBPO submits the annual Student Fees Report to the Chancellor's Office, which reports how much revenue is being charged/collected for each fee

Financial Services

- Financial Services primarily manages revenue associated with Category III and IV fees
- For each fee, Financial services creates a separate fund and trust fund agreement, and ensures each expenditure is within the scope of that fee
- The Seawolf Service Center ensures that all fees are listed on the website and up to date

SSU Fees Defined

SSU Mandatory Registration Charges/Fees

(UGRD, 7 plus units per semester)

Description of Tuition and Other Mandatory Student Charges/Fees

	<u>Fall 2019</u>
CPI Adjustment*:	3.9%
Tuition Increase:	0.0%
<u>CAMPUS-BASED FEES</u>	
Associated Students Fee	\$129
Consolidated Services Fee	\$20
Couns. & Psych. Services (CAPS) Fee	\$61
Health Facilities Fee	\$20
IRA Fee	\$260
Student Health Fee	\$154
Student Union Fee	<u>\$425</u>
TOTAL	\$1,069
<u>UNDERGRADUATE</u>	
<u>7 or more units</u>	
Tuition Fee	\$2,871
BIOL 110 (course fee)	\$5
Campus-based Fees	<u>\$1,069</u>
TOTAL	\$3,945
<u>Additional Fees (charged per semester)</u>	
Non-residential Tuition Fee (per unit)	\$396
Graduate Business Professional Fee (MBA) (per unit)	\$270
Optional SIRF Fee (Mandatory-Optional)	\$2
* Campus-based fees adjusted each academic year based on Bay Area CPI per 2001 Referendum*	

SSU Course Fees

SSU Course Fee Guidelines (Category III) & Application Process

Purpose of Course Fees

(Course fees may be approved and implemented if they meet any of the following conditions):

- They pay for the cost of activities related to a course (e.g. field trip, tickets to off-campus lecture or event);
- They provide students with an object or product of value (e.g. artwork, safety gear); or,
- They cover costs associated with specific courses (e.g. specialized equipment or materials, risk management, laboratory supplies or expendable products)

SSU Course Fee (Category III) Guidelines & Application Process (Continued)

SSU Course Fees Policy:

- SSU has established a [Course Fees policy](#) to be followed for the establishment and continuation of all campus-based course fees

Course fees are not intended to replace general operating costs, which are to be paid from the general university fee

SSU Course Fee (Category III) Guidelines & Application Process (Continued)

Approved Fee Ranges:

- The President is delegated authority to establish Category III fees (Course Fees) within ranges established by the Chancellor as follows:
 - \$0 - \$150: Fees that supplement the basic complement of classroom and laboratory instruction by providing materials and services that would otherwise be unavailable to students, and which allow students to meet the educational objectives of a given course
 - \$0 - \$3,000: Fees for courses that require field trips or travel off campus in order to meet the educational objectives of a given course

SSU Course Fee Guidelines (Category III) & Application Process (Continued)

Course Fee Application Process

- For each course fee, Departments must have an approved ["Agreement for Establishment or Continuation of a Trust Fund Account"](#) form on file with the University Controller (Financial Services) before any monies may be collected or dispersed
- If a course fee change is requested, the approved Trust Fund Agreement form is required to be submitted to Financial Services ten business days prior to the start of registration for a given semester to allow time for implementation

Course Fee Review Criteria & Guidelines

- An analysis will happen every year with the following guidelines:
 - Each Fee will be audited on a two year cycle with half reviewed in an odd year and the other half reviewed in an even year
 - Audits will include at minimum a review of expenditures, review of the trust agreement, and an explanation if the funds have not been spent down
- Additionally:
 - Any course fee that is less than 50% spent will be marked for review
 - Departments requesting fee increases will be reviewed



Instructionally Related Activities



Instructionally Related Activities

- IRA Fee and Guidelines

- Category II Fee

- FY19/20 IRA Fee: \$260/semester – automatically increased by CPI each year

- Education Code §89230

- Definition: “ ‘Instructionally Related Activities’ means those activities and laboratory experiences that are at least partially sponsored by an academic discipline or department and that are...integrally related to its formal instructional offerings. Activities that are considered to be essential to a quality educational program and an important instructional experience for any student enrolled in the respective program may be considered instructionally related activities.”

Instructionally Related Activities

- IRA Fee and Guidelines (con't)
 - 2003 IRA Fee Referendum
 - Four Permanently Funded Programs based on the percentage of total IRA Revenue:
 - Athletics (62.25%)
 - Children's School (2.11%)
 - Library (6.26%)
 - Performing Arts (15.91%)
 - Annually Funded Program Pool (13.47%)

Instructionally Related Activities

- IRA Fee and Guidelines (cont.)
 - Prohibited Expenses
 - Equipment used exclusively for classroom instruction
 - Hospitality expense which exceed 25% of the IRA allocation
 - Promotional items (not include posters, flyers, etc.)
 - Gifts that honor, thank, or congratulate an individual or group
 - Faculty and Professional staff salaries
 - Capital projects
 - Any expenses not included in the original application proposal
 - Tuition and course fees
 - Grant in aid (scholarships, stipends, grants, etc.)
 - Retroactive funding without consent of the Student Fee Advisory Committee
 - Travel expenses for faculty and staff

Instructionally Related Activities

- Application Process for New Program Requests
 - New Program application cycle opens (September)
 - New Program applications due mid-semester (October)
 - New Programs present to IRA Committee (November/December)
 - IRA Committee reviews new program requests (January/February)
 - IRA Committee finalizes IRA annually funded program recommendation for future FY (March)
 - IRA Committee presents final recommendation to SFAC (March)
 - SFAC sends final recommendation to President (by end of March/Early April)
 - President reviews SFAC recommendation (April)
 - New and continuing IRA programs are notified of funding allocations (May)

Instructionally Related Activities

- Assessment and Increase Request Process for Continuing Programs
 - Annual assessment cycle opens (November)
 - Annual Assessments due end of Fall semester (December)
 - IRA Committee reviews assessments and increase requests for existing programs (January/February)
 - IRA Committee finalizes IRA annually funded program recommendation for future FY (March)
 - IRA Committee presents final recommendation to SFAC (March)
 - SFAC sends final recommendation to President (by end of March/Early April)
 - President reviews SFAC recommendation (April)
 - New and continuing IRA programs are notified of funding allocations (May)

Instructionally Related Activities

- Funding Cycle for IRA Programs
 - Funding allocations are made in two equal allocations at the start of each semester in the FY they are allocated
 - Fall Allocation: August
 - Spring Allocation: January
 - Remaining funds are swept **after** the close of the FY if they are not spent
 - Funds are swept in August of the following FY

Referendum

Referendum

- EO 1102, Section IV.C.
- The SFAC (and IRA) serve as the working group to support a proposed fee referendum
 - Advisory to the president
 - Prepare voter material
- 2 unique committees