

Fee Proposal Request Form

In accordance with the provisions of the California State University (CSU) [Executive Order 1102](#), the President is delegated the authority for the establishment, oversight and adjustment of Category II, III, IV and V fees. To facilitate this process, please provide the information requested below. Be prepared to present this fee request to the Student Fee Advisory Committee (SFAC). Once the document is submitted, please contact the chair of the SFAC to get added to the meeting agenda.

Required documents for submission of proposal:

Part 1 - Fee Proposal Request Form with appropriate signatures, Requester, Dean/Director, and the divisional Vice President

Part 2 - Fee Request Narrative - Provide as much detail as possible to ensure the approvers understand the purpose of the request

Part 3 - Financial Data Sheet (you can use the worksheet that is included in the form or attached additional documents)

Fee Category: Category V (Self Support Program Fees)

Request To: Adjust a current fee

Name of Fee: Housing Rate Increase 2024 and 2025 (See Attached)

Current Fee: Per Year

Proposed Fee: Per Year

Proposed Effective Date: 08/01/2024

Routing Order:

1. Submitted by:	Todd Larsen Dept. Representative Name	Todd Larsen Digitally signed by Todd Larsen Date: 2024.03.14 10:42:51 -07'00' Signature	03/14/2024 Date	707-826-5310 Phone
2. Approved by:	Todd Larsen Dean/Director Name	Todd Larsen Digitally signed by Todd Larsen Date: 2024.03.18 08:54:32 -07'00' Signature	Date	Phone
3. Approved by:	Chrissy Holliday Vice President Name	Chrissy Holliday Digitally signed by Christin Holliday Date: 2024.03.18 13:02:41 -07'00' Signature	03/18/2024 Date	707-826-3361 Phone
4. Reviewed By:	Amber Blakeslee Budget Director	Amber Blakeslee Digitally signed by Amber Blakeslee Date: 2024.03.22 09:20:28 -07'00' Signature	03/22/2024 Date	707-826-5702 Phone
5. Recommended By:	Chrissy Holliday SFAC Chair	Chrissy Holliday Digitally signed by Christin Holliday Date: 2024.03.18 13:02:57 -07'00' Signature	03/18/2024 Date	707-826-3361 Phone

☒ Recommended Approval ☐ Recommended Approval w/ Modification ☐ Recommended Denial

Comments from SFAC (if needed):

Presented to SFAC as information - no negative feedback received. The move to a two-year approval process supports SFAC's desire to provide better planning information to students and is part of a multi-year planning approach that meets SFAC priorities.

6. Approved By:	Carla Ho'a Vice President of Admin Affairs	Carla L. Ho'a Digitally signed by Carla L. Ho'a Date: 2024.03.24 17:09:50 -07'00' Signature	03/24/2024 Date	707-826-3351 Phone
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Comments from the VP of Admin Affairs (if needed):

7. Approved By:	Tom Jackson President of University	Tom Jackson Jr. Signature	03/25/2024 Date	707-826-3311 Phone
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☒ Recommended Approval ☐ Recommended Approval w/ Modification ☐ Recommended Denial

8. Form with President's signature sent to the Manager of Student Accounts

1. Clearly list all assumptions used when creating this proposal.

Housing is in need of a rate increase to support building goals and reaching a Debt Service Coverage Ratio (DSCR) for budget financing for our future housing projects. Reserves have fallen from \$19.7M in 2018/19 to this year's \$1.6M.

2. Clearly state the expenditures that will be funded by this proposed revenue source.

Housing operating budget will be funded along with capital expenditures for repairs and replacements on our very old Housing inventory.

3. Clearly state the reason(s) why this fee or fee increase is necessary (include references to executive orders, CA law, etc.)

Budget office has worked on Housing's systemwide portfolio, including planned Craftsman Mall and Housing/Dining/Health projects. To meet the Chancellor's Office Debt Service Coverage Ratio (DSCR) for our proposed projects, it's necessary for this rate increase to meet the minimum financing requirements. In addition, Housing repairs and replacements are necessary for us to update interiors as we can afford to to remain competitive as a Cal Poly destination for students to live on campus.

4. Clearly articulate why the level of fee proposed is the appropriate amount to charge.

Budget office has reviewed rate increases from 3% to 5% in order to meet our long term goals. A 5% increase was approved for 22/23, and our proformas show that a continuing annual 5% increase for the next 3 years is needed to meet our long term funding goals. Rates increase has been shared with SFAC for 2024 and 2025 at 5% for Housing.

5. Timeline Information:

Rates will be effective for the 2024/25 academic fiscal year at 5% increase. And then another 5% effective 2025/26. We are also showing a 5% increase for the 2026/27 years to meet our 1.10 minimum DSCR per the campus Budget office.

Housing Rate Increase 2024 and 2025 (See Attached)

Current Rate

Per Year

Proposed Rate

Per Year

Year 1

Year 2

Year 3

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See attached

See attached

See attached

Current number of participants

Estimated number of participants that will be assessed this fee

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Historical Data

(for fee increase
proposal)

Prospective Data

(2 years of fee increase; 3 years for a new fee)

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Fee Adjustment Proposal: Enter ONE complete year of historical actual revenue and expenditure data and TWO years of prospective data.

New Fee Proposal: Enter THREE years of prospective revenue and expenditure data

Fee Revenue Type:

Total Revenue	\$ 0.00

\$ 0.00	\$ 0.00	\$ 0.00

Expenditure Type: (List typical categories of expenditure costs that the fee proposed will cover - salaries, travel, supplies, rental of meeting room, etc.)

[illegible][illegible]

Total Expenditures:	\$ 0.00
Net (Revenue minus Expenditures)	\$ 0.00

\$ 0.00	\$ 0.00	\$ 0.00
\$ 0.00	\$ 0.00	\$ 0.00

Fund

Dept

Program

Class

Project

Please note to the right the chartfield string where the existing revenue fee and actual expenditures are recorded for this program