

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 II (Mandatory Campus Fees)

Request To: Adjust a current fee

Name of Fee: Summer Category II Rates (documentation attached)

Current Fee: Per

Proposed Fee: Per

Proposed Effective Date: 03/01/2024

Routing Order:

1. Submitted by:	Andrew Kime Dept. Representative Name	Andrew Kime Signature <small>Digitally signed by Andrew Kime Date: 2024.02.27 08:50:09 -08'00'</small>	02/27/2024 Date	707-826-5273 Phone
2. Approved by:	Dean/Director Name	Signature	Date	Phone
3. Approved by:	Carla Ho'a Vice President Name	Carla Ho'a Signature <small>Digitally signed by Carla Ho'a Date: 2024.02.28 12:43:13 -08'00'</small>	02/28/2024 Date	707-826-3351 Phone
4. Reviewed By:	Amber Blakeslee Budget Director	Amber Blakeslee Signature <small>Digitally signed by Amber Blakeslee Date: 2024.02.27 11:37:15 -08'00'</small>		707-826-5702 Phone
5. Recommended By:	Chrissy Holliday SFAC Chair	Chrissy Holliday Signature <small>Digitally signed by Christin Holliday Date: 2024.02.27 12:12:05 -08'00'</small>	02/27/2024 Date	707-826-3361 Phone

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

Comments from SFAC (if needed):

Recommended for approval with no concerns from students or SFAC broadly, as this aligns with all prior approvals. Need to get this clarified summer fee plan in place before summer registration opens.

6. Approved By:	Carla Ho'a Vice President of Admin Affairs	Carla Ho'a Signature <small>Digitally signed by Carla Ho'a Date: 2024.02.28 12:44:06 -08'00'</small>	02/28/2024 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	February 28, 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.

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

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

To stay compliant with our category II fees for the newly transitioned state-side summer term

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

There is currently no established category II fees for summer

5. Timeline Information:

Once approved, these category II fees will be charged for the Summer 2024 term. Enrollment for these summer term courses begin April 8, 2024. Students should have no less than 30 days of notification of these fees.

Summer Category II Rates (documentation attached)

Current Rate Per

Proposed Rate Per

Year 1Year 2Year 3

Current number of participants

Estimated number of participants that will be assessed this fee

Historical Data
(for fee increase proposal)

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

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.)

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

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

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

FundDeptProgramClassProject

Summer Category II Fees

Date: February 27, 2024

With the Summer term now stateside, Cal Poly Humboldt needs to formalize summer fee rates in alignment with historical approvals and applicable policies. A key aspect of formalizing fee rates is to establish a transparent and consistent approach for Summer Category II fee rates.

Background

Per the [CSU Student Tuition and Fee Policy](#), Category II Fees are “campus mandatory fees that must be paid to enroll in or attend the university.” Summer, like Fall and Spring, is a term where campus mandatory fees must be paid to enroll.

Prior Summer Documentation by Category II Fee

- Student Body Association Fee (AS) - the last fee increase approval that specified Summer was in 2005, which specified a summer fee of \$50, aligned with Fall (\$51) and Spring (\$50); summer was not mentioned in the fee increases in 2014 or 2023 as they only referenced fall and spring, however summer was offered via self-support during this time
- Instructionally Related Activities Fee (IRA) - the last fee increase approval that specified Summer was in 2007, which specified a summer fee of \$49, plus a per unit fee of \$16.75 up to a maximum of 12 units, with fall and spring part-time (\$149) and full-time (\$250) rates; the 2011 increase reflects a per semester rate increase, which would include summer, but did not directly mention the summer term
- Materials, Services & Facilities Fee (MSF) - fee approved in 2010 based on a part-time and full-time fee rates by semester, with no mention of fall, spring or summer specifically; therefore, summer fee rates would be based on approved semester rates
- Health Facility Fee - the last fee approval that specified Summer was in 2000, which specified a fee rate of \$3, aligned with fall (\$3) and spring (\$3); the 2018 rate increase was based on a semester rate, and did not reference specific terms, however the President’s memo did reference an annual rate for information purposes based on fall + spring that did not include summer as it was offered via self-support at the time
- Student Health Fee - the last fee approval that specified Summer was in 2000, which specified a fee rate of \$80 that was “to be waived for the summer session until services are offered”; recent fee increases have referenced semester or term rates and not specific terms, however one of the President’s memos did reference an annual rate for information purposes based on fall + spring that did not include summer as it was offered via self-support at the time
- Student Body Center Fee (Campus Union) - the last fee increase approval that specified Summer was in 2002, which specified a summer fee of \$92, aligned with Fall (\$93) and Spring (\$92); the 2019 increase reflects a per semester rate increase but did not directly mention summer term

Considerations

- Many of the historical campus Category II fee approvals reflect summer fee rates at the same level as fall and spring terms.
- The stateside Summer term offers two five week sessions and one eight week session, whereas the fall and spring terms are about 16 weeks long.

- Prior to Summer 2023, summer session had been offered via self support for many years and while recent approvals speak to semester or term rates more generally, recent fee approvals have not directly mentioned summer term rates
- Campuses do not have general discretion to waive fees and can only waive fees if an authorized fee waiver is applicable.
- Historically, over 80% of students enrolling in Summer take 6 units or less.
- Summer session fees at all campuses of the University of California and the California State University shall not exceed the fees charged per credit unit for any other academic term (Education Code 66057).

Proposal

To simplify and clarify Category II summer term rates, propose to apply consistent summer term rates as a proportion of the already approved semester rates

- Benchmark summer fee rates at no more than 50% of part-time Fall/Spring term rates, approximating the difference in length of the academic term in Summer vs Fall/Spring.
- Summer would be the trailing term in terms of fee rates, so if a Category II fee increase was approved for Fall 2024, the increase would not apply until Summer 2025.
- All fee rates will be rounded to the nearest whole dollar.
- Category II fees would be assessed once during the summer term even if a student enrolls in more than one session, with the fees being assessed on the first unit taken
- For Category II fees where the service or facility is not provided during the summer, the fee will not be assessed. Partial service offerings to be evaluated on an individual basis.
 - In the event that service is established or enhanced, the fee rate would be assessed at the applicable fee rate. Prior to implementation, notification will be provided to SFAC.

Proposed Fee Rate Table

	Fall/Spring 2023-24 Fee Rates		Summer 2024
	PART-TIME (0-6 Units)	FULL-TIME (7+ Units)	PROPOSED (50% of P-T)**
Category II Fees*			
Materials, Services & Facilities Fee	\$86	\$174	\$43
Instructionally Related Activities Fee (IRA)	\$201	\$337	\$100
Student Body Association Fee (ASB)	\$68	\$68	\$34
Campus Union Fee	\$123	\$123	\$62
Health Facilities Fee	\$33	\$33	\$17
Student Health Fee**	\$348	\$348	\$44
Student Involvement & Representation Fee (optional)	\$2	\$2	\$0
Total	\$861	\$1,085	\$300

*ID Card Fee and Orientation Fee are not reflected here

**Note: Health Fee @50% is \$174, reflected this year at ¼ of amount due to partial service offerings