



# HUMBOLDT STATE UNIVERSITY

Office of the President

Student Fee Advisory Committee  
Humboldt State University

February 11, 2011

Dear Committee Members:

Thank you for your memorandum regarding the proposed increase in the IRA fee. I concur with your recommendation, including the request to separate the components of the fee for future considerations, and have asked the Chancellor to approve the fee increase. He recently informed me that he had approved the proposed increase. The following table summarizes the increases that full-time students will be required to pay beginning with the Fall semester of 2011.

Fee Distribution	2010/11 Current Rates	2011/12 Proposed Rates	2012/13 Proposed Rates
Full Time Rate/Semester	\$278.00	\$310.00	\$337.00

The IRA fee for part-time students will be \$185 per semester beginning in the Fall of 2011 and \$201 per semester beginning in the Fall of 2012.

I very much appreciate the thorough consultation process that our Student Affairs group undertook to educate students about the need for this fee increase. I have enclosed a document that summarizes the steps undertaken.

I regret having to increase the cost of attending Humboldt State University for our students. However, these increases are largely a consequence of increases outside the control of the university. For Athletics, increases in benefit costs associated with health care are largely responsible for the increases. For the JackPass, increases are due to the rising costs of fuel that are passed along to the university by our local transportation authorities. For many students, the proposed fee increase will be covered by financial aid. Until the State of California reconsiders its priorities and restructures its dysfunctional political system, these fees are likely to continue to increase in future years. Thank you again for your assistance in making these decisions.

Sincerely,

Rollin C. Richmond  
President

cc: Provost Snyder  
Vice Presidents Nordstrom, Blake, Whitlatch  
Associate Vice President Terry  
Associated Students General Manager Tyson



# HUMBOLDT STATE UNIVERSITY

Office of the President

February 9, 2011

Charles B. Reed  
Chancellor  
The California State University  
Office of the Chancellor  
401 Golden Shore  
Long Beach, CA 90802-4210

Dear Chancellor Reed:

I write to inform you and seek your approval for an increase in the Instructionally Related Activities Fee (IRA) for students at Humboldt State University effective for the Fall Semester of 2011. During the Spring of 2010, we consulted with students about an increase in the IRA fee to pay for increases in our JackPass, IRA Programs, Humboldt Energy Independence Fund (HEIF) and Athletics program. The student leadership asked that we delay a decision on these fee increases until the Fall of 2010 to provide time for students to review the proposals. I agreed to this delay and asked my colleagues in Student Affairs to undertake a thorough consultative process during the Fall semester of 2010. They did so and this process is described in detail in the enclosed report to our Student Fee Advisory Committee.

I have recently received a memorandum from the Student Fee Advisory Committee recommending that we impose the fee increase for a two-year period with the understanding that these fees be considered again, separately in the 2013/14 academic year. I agree with this recommendation. If you approve this increase, students will be charged as follows.

Fee Distribution	2010/11 Current Rates	2011/12 Proposed Rates	2012/13 Proposed Rates
Full Time Rate/Semester	\$278.00	\$310.00	\$337.00

The IRA fee for part-time students will be \$185 per semester beginning in the Fall of 2011 and \$201 per semester beginning in the Fall of 2012.

The largest increases in this fee are due to Athletics and the JackPass Program. The increase in Athletics is mainly due to large increases in benefit programs for staff in Athletics. Costs of the JackPass program (Allows student access to all local government buses available in Humboldt County) have increased due to large increases in the costs of fuel that have been passed along to the university by local transportation agencies.

Charles B. Reed  
February 9, 2011

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In an effort to accommodate the athletic budget to a specific allocation, I may need to redistribute the specific allocation of the total IRA fee from time to time, but the overriding \$310 IRA fee would not change, without returning to the Student Fee Advisory Committee and going through the consultative process.

Thank you for your consideration of this fee adjustment.

Sincerely,



Rollin C. Richmond  
President

cc: Robert Snyder, Provost and Vice President, Academic Affairs  
Burt Nordstrom, Vice President, Administrative Affairs  
Peg Blake, Vice President, Enrollment Management and Student Services  
Frank Whitlatch, Vice President, University Advancement  
Carol Terry, Associate Vice President, Business Services  
Joan Tyson, General Manager, Associated Students

THE CALIFORNIA STATE UNIVERSITY  
OFFICE OF THE CHANCELLOR

BAKERSFIELD

February 18, 2011

CHANNEL ISLANDS

**MEMORANDUM**

CHICO

DOMINGUEZ HILLS

TO: Dr. Rollin Richmond  
President, Humboldt State University

EAST BAY

FROM: Charles B. Reed  
Chancellor

FRESNO

FULLERTON

SUBJECT: Increasing the Instructionally Related Activities Fee

HUMBOLDT

Thank you for the notification of your plans to increase the Instructionally Related Activity fee over a two year period beginning with the fall 2011 term. As president, you have the authority to increase Category II campus based fees following the broadest possible campus consultation and receiving a recommendation from the Student Fee Advisory Committee. Your decision to postpone action on the fee rate change to allow a thorough and open consultative process over a two week period last fall demonstrates thoughtful awareness of the CSU fee policy process and follows the policy guidelines in Executive Order 1054.

LONG BEACH

S ANGELES

MARITIME ACADEMY

MONTEREY BAY

NORTHRIDGE

The cost pressures related to benefit and fuel cost increases that necessitate the decision to increase the Instructionally Related Activities Fee (IRA) are understood; however, reconsideration of the rate in the 2013/14 should be undertaken with the understanding that the need for services provided are critical to students' educational success.

POMONA

SACRAMENTO

SAN BERNARDINO

CBR:rr

SAN DIEGO

SAN FRANCISCO

c: Dr. Benjamin F. Quillian, Executive Vice Chancellor/CFO  
Mr. Burt Nordstrom, Vice President for Administrative Affairs  
Mr. Robert Turnage, Assistant Vice Chancellor for the Budget  
Ms. Carol Terry, Associate Vice President for Business Services  
Mr. Rodney Rideau, Director for Budget

SAN JOSÉ

SAN LUIS OBISPO

SAN MARCOS

SOMA

STANISLAUS

## A Fee Restructuring Proposal for the Instructionally Related Activities (IRA) Fee

Upcoming Campus Wide Meetings		
Date	Time	Location
October 25	5 – 6 pm	Recreation Room at lower level in the "J"
October 26	Noon – 1 pm	UC South Lounge

<b>IRA Fee Proposal Website with a Link to Provide Feedback</b>
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<a href="http://www.humboldt.edu/budget/IRAFeeProposal.php">http://www.humboldt.edu/budget/IRAFeeProposal.php</a>
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**Description and Rationale:** Each semester students pay the IRA Fee to support important and unique activities. The IRA Fee in turn benefits many Humboldt State students.

Currently, the IRA fee provides financial support to four programs. First, the Humboldt Energy Independence Fund (HEIF) makes awards for student recommended projects across campus, such as solar power projects and energy efficient lighting for the Redwood Bowl. Second, the student-led IRA Committee helps 35 student programs, such as the Marching Lumberjacks, Theatre Arts, Osprey Magazine, student conclaves, etc. Third, the IRA Fee funds Athletics along with ticket sales, donations, concessions sales, etc. which supports seven women's teams and five men's teams with 351 HSU student athletes, and students paying the IRA fee may attend regular home games simply by showing their student ID. Fourth, JackPass allows students to ride regional public transportation by simply showing their student ID. In particular, JackPass is very popular with students and has grown from providing students with about 250,000 rides in 2007-08 to over 310,000 rides in 2009-10 – That's a 24% increase in only 3 years, while JackPass's share of IRA revenue went up only 7.3% during the same period.

However, the IRA Fee is running out of steam and is no longer sustainable. Each year the IRA Fee has been increased by an inflation factor which has not kept up with our IRA program costs. For example, we expect double digit increases in mandatory retirement and medical costs for employees, and increased costs from the bus companies, due to the popularity of the JackPass and their increased payroll costs, fuel costs, etc. We also expect increased costs for items, such as printing, travel, performing arts productions, insurance, equipment, supplies, and so forth.

If we fail to act, then the quality of these programs will suffer due to cutbacks. More importantly, we may lose an important facet of what makes Humboldt State different, more diverse, more sustainable, more innovative.

To keep the IRA programs viable and sustainable, we propose two changes. First, we propose to raise the IRA Fee by a flat dollar amount each year as described in this section. This chart summarizes the proposed IRA Fee rates:

## A Fee Restructuring Proposal for the Instructionally Related Activities (IRA) Fee

IRA Fee Proposal	Full-time Student		Part-time Student	
	IRA Fee	Increase	IRA Fee	Increase
Fall (current rate)	\$278.00		\$166.00	
Spring (current rate)	\$278.00		\$166.00	
2010-11 Academic Year	\$556.00		\$332.00	
Fall	\$310.00	\$32.00	\$185.00	\$19.00
Spring	\$310.00	\$32.00	\$185.00	\$19.00
2011-12 Estimate	\$620.00	\$64.00	\$370.00	\$38.00
Fall	\$337.00	\$27.00	\$201.00	\$16.00
Spring	\$337.00	\$27.00	\$201.00	\$16.00
2012-13 Estimate	\$674.00	\$54.00	\$402.00	\$32.00
Fall	\$366.00	\$29.00	\$219.00	\$18.00
Spring	\$366.00	\$29.00	\$219.00	\$18.00
2013-14 Estimate	\$732.00	\$58.00	\$438.00	\$36.00
Fall	\$398.00	\$32.00	\$238.00	\$19.00
Spring	\$398.00	\$32.00	\$238.00	\$19.00
2014-15 Estimate	\$796.00	\$64.00	\$476.00	\$38.00

Second, we propose to reset the distribution percents between the four programs, so that Athletics receives a smaller share of the total IRA Fee, JackPass receives a larger share, and HEIF and IRA Committee each receive their share of the increase. Effectively, Athletics would get a smaller increase which allows JackPass to realize a larger increase. The chart on the next page illustrates how the proposal to redistribute the IRA Fee will impact the programs, particularly Athletics and JackPass:

IRA Fee Distribution Proposal	2010-11 Current Rates		2011-12 Proposed Rates	
	Amount	Percent	Amount	Percent
Athletics	\$223.83	80.5%	\$241.38	77.9%
HEIF	\$11.06	4.0%	\$12.33	4.0%
IRA Committee	\$26.53	9.5%	\$29.59	9.5%
Jack Pass	\$16.58	6.0%	\$26.70	8.6%
Total Forecast	\$278.00	100.0%	\$310.00	100.0%

The chart below illustrates the proposed funding shift of \$119K from Athletics to JackPass. The *Recast* column shows the proposed new IRA fee distributions for 2011-12, and the *Change* columns show the amount that moves from Athletics to JackPass and the percent change:

## A Fee Restructuring Proposal for the Instructionally Related Activities (IRA) Fee

HSU Revenue Budget Proposal	2011-12		Change	
	Budget Estimate	RECAST	Amount	Percent
Athletics	\$3,545,000	\$3,426,000	-\$119,000	-3.4%
HEIF	\$183,000	\$183,000	\$0	0.0%
IRA Committee	\$440,000	\$440,000	\$0	0.0%
Jack Pass	\$295,000	\$414,000	\$119,000	40.3%
Total Forecast	\$4,463,000	\$4,463,000	\$0	0.0%

Stabilizing the IRA Fee and increasing the JackPass's share will allow the IRA programs to maintain their high quality success and place the programs on a sustainable path.

### To Learn More and To Get Involved:

Attend one of the Campus Wide Meetings scheduled for October 25, 2010 from 5 to 6 pm in the Recreation Room at the lower level in the "J" and October 26, 2010 from noon to 1 pm in the UC South Lounge. Feedback forms will be available at these meetings. Also, information is available at the IRA Fee Proposal website at

<http://www.humboldt.edu/budget/IRAFeeProposal.php> where you can also leave comments.

### Frequently Asked Questions:

1. **I'm on financial aid; will the fee be covered in my financial aid packet?** The IRA fee is included in your registration fees and would increase your financial aid budget. The Financial Aid Office would determine how your financial aid package would be adjusted based on this change.
2. **How will the IRA Fee affect my classes?** The IRA Fee programs do not divert any funds from the classroom. On the other hand, these funds cannot be used for classes.
3. **Will the JackPass continue to be free to all students who pay the IRA Fee?** Yes, if the proposed fee increase is implemented the JackPass would continue for all students paying the IRA Fee.
4. **I only attend part-time, can I use the JackPass and go to regular home games by showing my ID card?** Yes, it doesn't matter if you are a part-time or full-time student, as long as you pay the IRA Fee, you can use all of the services.
5. **Do other universities have similar programs?** Yes. Many universities have programs similar to the JackPass and charge as much or more than the JackPass. Also, many universities have Athletics programs, student activities, etc.
6. **Why don't students who want to do an energy project just pay for it themselves? Why should all students have to pay for them?** Students voted to assess themselves the fee for the Humboldt Energy Independence Fund (HEIF). It is the combining of all the students together that makes these programs stronger.
7. **Why don't students just buy a bus pass or pay the bus fare?** By pooling our purchasing power, students can usually get a better deal on the JackPass than paying for each ride

## **A Fee Restructuring Proposal for the Instructionally Related Activities (IRA) Fee**

individually. Also, students might miss more classes if they don't have enough money for bus fare, especially near the end of the semester. Furthermore, the IRA Fee can be included in financial aid packages. (The Financial Aid Office would determine how your financial aid package would be adjusted based on this change.)

8. **What will happen if this fee is not approved?** If the IRA fee is not approved there is little doubt that many of these services will be lost or cut back. *If the JackPass gets cut back, students may end up paying more for transportation, such as car expenses, parking permits, etc.*
9. **Does the fee apply to grad students and other post baccalaureate students, such as credential students?** Yes.
10. **Who determines how the IRA fee is allocated?** The fee is allocated to the four programs directly on a percentage basis. The proposal is to reset the percentages in Fall 2011, so that Athletics gets less of an increase, JackPass gets more of an increase, and HEIF and IRA Committee continue to get their share. Then, each program has a committee with student representation that makes recommendations on their program or directly allocates funds.
11. **What is the review process for this proposal? How can I give my opinion?** California State University policy requires consultation with students and the campus community prior to implementing fees such as those proposed. This proposal is being reviewed by several campus groups and committees, including the Student Fee Advisory Committee at its October 6<sup>th</sup> and 20<sup>th</sup> meeting, the IRA Committee, Parking and Transportation Committee, and Associated Students. You are encouraged to attend one of the Campus Wide Meetings scheduled for October 25, 2010 from 5 to 6 pm in the Recreation Room at the lower level in the "J" and October 26, 2010 from noon to 1 pm in the UC South Lounge. Feedback forms will be available at these meetings. Also, information is available at the IRA Fee Proposal website at <http://www.humboldt.edu/budget/IRAFeeProposal.html> where you can also leave comments. Also, if a student advisory referendum is held, current students will be able to vote to support or not support the proposal.

### **Pros and Cons:**

#### **Pros**

- The IRA fee proposal will ensure that students continue to enjoy the services, enrichments and experiences that supplement and round out an HSU education.
- Even with the proposed increase, HSU remains among the most affordable universities in the country.
- Without the IRA fee proposal, services may be curtailed, which could result in students paying more for transportation, less competitive and possibly fewer athletic programs, less funding for the Lumberjack student newspaper, KRFH student radio station, etc., and fewer energy independence projects.



## **A Fee Restructuring Proposal for the Instructionally Related Activities (IRA) Fee**

- Financial aid to cover the cost of the increased fee is available as part of the student's financial aid packet. The Financial Aid Office would determine how your financial aid package would be adjusted based on this change.

### **Cons**

- The additional IRA fee would impose an increased financial burden on students. Students who are working their way through school must work even longer hours to pay these fees. This could limit access to higher education for some students in the face of escalating fee structures at HSU and the CSU.
- Some students would have to pay the IRA fee, even though they might not use the services funded by the IRA fee.
- The IRA programs should look for other sources of funds or cut back their services to reach sustainability, rather than increasing the IRA Fee.
- Since these services are not required for an HSU degree, students should only have to pay for services they use.

# Referendum on the Proposal to Increase the IRA Fee

**Sample Ballot: Do you support the proposed IRA fee increase as shown in the chart below?**

- YES** A Yes vote indicates you approve of the proposal.
- NO** A No vote indicates you disapprove of the proposal.

IRA Proposal	Full-time Student		Part-time Student	
	IRA Fee	Increase	IRA Fee	Increase
Fall 2010	\$278.00		\$166.00	
Spring 2011	\$278.00		\$166.00	
Current rate	\$556.00		\$332.00	
Fall	\$310.00	\$32.00	\$185.00	\$19.00
Spring	\$310.00	\$32.00	\$185.00	\$19.00
2011-12	\$620.00	\$64.00	\$370.00	\$38.00
Fall	\$337.00	\$27.00	\$201.00	\$16.00
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Spring	\$398.00	\$32.00	\$238.00	\$19.00
2014-15	\$796.00	\$64.00	\$476.00	\$38.00

The Instructionally Related Activities (IRA) Fee funds Athletic, Humboldt Energy Independence Fund (HEIF), IRA Committee which funds 35 student programs, and JackPass. Presently, the IRA Fee is increased each year by an inflation rate. This proposal does away with the inflation rate and instead increases the fee each year through 2014-15 as shown in the chart on the left.

The chart on the bottom left shows that JackPass would receive larger share of IRA Fees increasing from 6% to 8.6%, while Athletics would receive a smaller share from 80.5% down to 77.9%.

**PROS:**

- Students continue to enjoy the services, enrichments & experiences that supplement & round out an HSU education.
- Athletics contributes to campus diversity, has annual student attendance of 25,000, and attracts community support. JackPass had over 310,000 rides in 2009-10.
- This increase will allow us to maintain the current level of services.
- For some students on financial aid, this increase will be covered with an increased grant and no additional out-of-pocket expense.

**CONS:**

- The IRA Fee increase is not sustainable and fee increases will be needed in the future.
- The majority of the restructured dollars will go towards maintaining existing athletics programs and not cutting any sports. Some students do not want to subsidize athletics any further because these students aren't athletes and/or don't attend games. Other students support athletics in concept but simply don't want to pay any more fees to meet required costs of these programs.
- A very small portion of the JackPass fee increase (perhaps \$1 or \$2 a year per student) might be used to enhance JackPass riders experience through maintenance of free wi-fi on busses or real-time tracking of bus arrivals on students' smart phones and on bus stop electronic kiosks. Some students don't want their fees going towards these Jack Pass expenses.
- For some students, an IRA fee increase will mean larger student loans or higher out-of-pocket costs.

**Without this increase: We don't have any easy solutions.**

For Athletics and JackPass, austerity plans would be discussed with their campus committees. Options include eliminating certain sports & a "co-pay" of some amount for JackPass riders.

Fee Distribution	2010-11 Current Rates		2011-12 Proposed Rates	
	Amount	Percent	Amount	Percent
Full-time Rate				
Athletics	\$223.83	80.5%	\$241.38	77.9%
HEIF	\$11.06	4.0%	\$12.33	4.0%
IRA Committee	\$26.53	9.5%	\$29.59	9.5%
JackPass	\$16.58	6.0%	\$26.70	8.6%
Total	\$278.00	100.0%	\$310.00	100.0%

**Online voting coordinated by the Associated Students: Dec 7, 8 & 9**

**Additional Information:**  
[www.Humboldt.edu/budget/IRAFeeProposal.php](http://www.Humboldt.edu/budget/IRAFeeProposal.php)

## Tawny Fleming

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**From:** Tawny Fleming  
**Sent:** Tuesday, November 01, 2011 2:10 PM  
**To:** Allison Freeman; Sandy Wieckowski (slw61@humboldt.edu)  
**Subject:** FW: IRA Fee Proposal Distribution  
**Attachments:** IRA Lumberjack Ad 2-HSU IRA 10-27-10.pdf; IRA Fee Proposal - Handout.pdf

Allison,

As we discussed, the percentage distribution needs to be updated on the IRA Item Type(s) before we assess the Spring 2012 term. Attached is the supporting documentation, but in sum, we were never notified about updating our percentage breakdown...we were only notified about the dollar amount increase which will be a set amount until FY 2012-13.

We will be decreasing the Athletics percentage and increasing the Jack Pass percentage by about 2.6%. Here is the new breakdown:

Athletics	77.8661%
HEIF	3.9780%
IRA Committee	9.5440%
Jack Pass	8.6120%

We will do a journal entry to reclass Fall 2011, but this needs to be in place for Spring 2012.

Thank you,

Tawny Fleming  
707.826.4273

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**From:** Amber L. Blakeslee [mailto:Amber.Blakeslee@humboldt.edu]  
**Sent:** Friday, October 21, 2011 11:24 AM  
**To:** Tawny Fleming  
**Cc:** David Rowe  
**Subject:** IRA Fee Proposal Distribution

5. Allocate the IRA revenue to Athletics, HEIF, IRA Committee, and Jack Pass:

IRA Fee Distribution Percents	Summer		Fall (Recast)	
	Part-time	Full-time	Part-time	Full-time
Athletics			62.9081%	77.8661%
HEIF			6.6649%	3.9780%
IRA Committee			15.9946%	9.5440%
Jack Pass			14.4324%	8.6120%
Total Distribution	0.00%	0.00%	100.00%	100.00%

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2012-13

Full-time

262.41

13.41

32.16

29.02

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337.00

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Amber Blakeslee  
University Budget Analyst  
Humboldt State University  
(707) 826-5744