

OREGON INSTITUTE OF TECHNOLOGY

Incidental Fees **OIT-40-090**

Introduction

A portion of the money required to operate Oregon Institute of Technology is paid directly by students at registration each term. These charges, called fees, are: tuition, building fees, and incidental fees. Tuition, together with state tax funds, supports instruction and related activities. Building fees are used to finance construction or remodeling of buildings such as the college union, health service, and recreational areas. Incidental fees are used to finance certain auxiliary programs, which fall under three major categories: Athletics, College Union, and Campus Life.

This document outlines policies and procedures related to the funding of programs at all OIT campuses supported by incidental fees superceding all previous guideline and policy statements.

Process Overview

By state law (ORS 51.070), the State Board of Higher Education is empowered to prescribe fees for the Oregon University System, in general, and for each constituent member institution of that system. The Board has sole authority to establish the amount of fees, whether they are to be increased or decreased, and how they are to be collected, accounted for, and expended.

In practice, the Board delegates fee collection, application and accountability to the President of the university. Thus, the President has authority to approve incidental fee budgets, subject only to review by the Board.

The President of this university has delegated certain responsibilities to the Incidental Fee Commission, which is primarily composed of students. In general, the Incidental Fee Commission conducts budget investigations, matches program requests for funding with available resources, and recommends to the President the budgets for all programs to be funded by incidental fees. A further responsibility of this Commission is to recommend the level of incidental fees required to fund the proposed budget.

Commission Membership

The Incidental Fee Commission is composed of the following members:

1. ASOIT President, chair
2. ASOIT Vice President
3. ASOIT Governmental Affairs Officer
4. ASOIT Finance Officer
5. ASOIT Administrative Officer
6. ASOIT Communication Coordinator
7. ASOIT Freshman Senator
8. ASOIT Veteran/Non-Traditional Senator
9. ASOIT Campus Club Senator
10. Portland ASOIT Senator
11. Vice President for Student Affairs (non voting)
12. Vice President for Finance and Administration (non voting)
13. Director of Business Affairs (non voting)
14. Director of Campus Life (non voting)

Funding Eligibility Requirements

To be eligible for funding from incidental fees, a program must meet at least one of the following criteria:

1. Be recognized as an integral part of the educational, cultural, and student government program.
2. Be an officially recognized group by virtue of a charter or other similar document certifying that recognition.
3. Be specifically designated by the Oregon State Board of Higher Education's policy as eligible for incidental fee funding.

In addition, all programs funded by incidental fees must meet the following requirements:

1. Only Oregon Institute of Technology students may serve as the elected or appointed officers of student programs.
2. A statement of the method of budgetary control to be employed must be furnished to the Incidental Fee Commission by the director of each program.
3. Each program must have a faculty and/or staff advisor.

Funding Evaluation Criteria

The following criteria will be used in evaluating a program seeking incidental fee funding:

1. Extent to which a program provides opportunities for students, either by direct participation or by participating as spectators or listeners, to develop new skills, competencies or appreciation not available on campus.
2. Extent to which there is agreement between the program's goals and objectives and those of its parent board, as well as the overall goals and objectives of the university.
3. Extent to which goals and objectives of a program are tied to budget requests, and, if a continuing program, extent to which its goals and objectives of the previous budget year(s) are fulfilled.
4. Extent to which a program complements the academic requirements of the university.
5. Extent to which a program is of general interest to the campus community.
6. Extent to which alternative funding has been sought.

An annual program review will be undertaken to assure the program's activities are in agreement with its stated purposes and objectives. The review will be undertaken by the Incidental Fee Commission. Incidental fee support is dependent upon availability of funds, whether from fees, or from generated income. Approved budgets may be modified in relation to funds available during the course of the year.

Major Categories

The three major categories funded by incidental fees are listed below, along with the specific OIT funded programs within each category. These programs are subject to change at the discretion of the Incidental Fee Commission.

Athletics

- OIT Athletics Department

College Union

- OIT College Union

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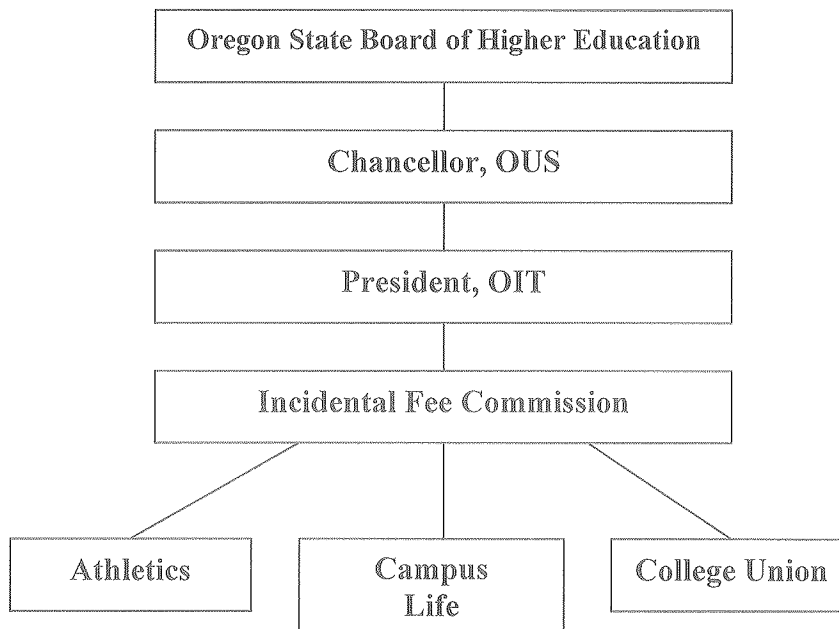
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Campus Life

- Associated Students of OIT
- Campus Clubs
- Campus Activities
- Residence Hall Association
- KTEC Radio Station
- The Edge Newspaper
- Outdoor Program
- Oregon Technical Broadcasting
- Diversity Center
- Women's Resource Center
- New Student Orientation

Organization

The organization for incidental fees at Oregon Institute of Technology is portrayed graphically by the following chart:



Once the incidental fees are allocated to the various programs, the Directors are responsible to the President of OIT for the administration of the funds.

Operating Procedures

1. The chairperson of the Incidental Fee Commission will be the ASOIT President.
2. *Academic year* is defined herein as starting on September 16 and extending through June 15 of the following year. *Fiscal year* is defined as starting July 1 and extending through June 30 of the following year and includes both the academic and summer terms. *Summer term* is defined as commencing mid-June and extending through mid-September.
3. Proxies will not be permitted.
4. A quorum will be necessary for the transaction of business. A quorum will consist of at least two-thirds of the voting membership.
5. Dissenting opinions will be filed with budget dockets and materials.

Incidental Fee Commission

The Incidental Fee Commission will make a determination of anticipated resources for each fiscal year by reviewing estimated student enrollment and projecting their numbers into dollar income. It will then oversee public hearings for each of the budget requests. Members may make appropriate inquiries to gather required information to make the best possible judgment as to the use of these funds. Following these hearings, a recommendation will be made to the President on programs to be funded and the distribution of resources for these programs.

The Incidental Fee Commission is advisory to the President of the university. Therefore, its recommendations on programs and budgets are advisory. It is expected that, because of the importance of incidental fees in the ongoing life and activities of OIT and the importance of the Commission itself, that the President will give very careful consideration to the Commission's recommendations. It is also expected that the Commission's recommendations to the President will be judicious and representative of the broad interest of many constituencies, and that these recommendations will be determined with full consideration as to their timeliness.

Authority and Cooperation

Rules to be adopted for the Incidental Fee Commission are to be submitted to the State Board of Higher Education for their approval. The Commission is authorized to recommend rules to the President for submission to the State Board of Higher Education. In carrying out its authority, this Commission will do the following:

1. Meet when deemed necessary and hold its meeting in conformity with the Oregon open meeting law (ORS 192.610 to 192.690)..
2. Establish additional sub-committees as it deems necessary.
3. Consult with any resource persons on campus, to obtain the necessary information and recommendations to carry on its work.
4. Conduct budget hearings for each of the budget requests. Resource personnel will be invited to attend such hearings, if appropriate.
5. Publish notification of all Commission meetings, including budget hearings, in Tech News Daily and on the ASOIT website.
6. Follow a budget calendar in a manner similar to the following time periods:
 - a) Distribute budget instructions to each program by the beginning of winter term.
 - b) Receive budget requests by the end of winter term.
 - c) Conduct preliminary budget hearings during the first two weeks of spring term.
 - d) Conduct final budget hearings during the second week in spring term after which the Commission will determine its final recommendations for the individual programs. Representatives of individual programs are encouraged to attend these meetings.
 - e) Forward IFC recommendations to the President by the end of the third week in spring term.
7. Each program will be given ample time to present and explain its budget to the Incidental Fee Commission, which will grant additional time if deemed necessary.

Adjudication of Differences and Allocation of Final Budgets

1. The President of the university will, within five working days, acknowledge and accept, in writing, the recommendations of the Incidental Fee Commission or notify the Commission, in writing, of any modifications under consideration by the President, including reasons for the proposed modification.
2. The Incidental Fee Commission will have five working days to consider and respond, in writing, to modifications proposed by the President. If the Commission concurs with the President's proposed modifications, such will be communicated, in writing, to the President within the specified time. If no response is received within the specified time, the Commission will be deemed to have concurred with the modifications.
3. If the Incidental Fee Commission does not concur, such will be communicated, in writing, to the President within the specified time. The President will, within five working days, meet with the representatives of the Incidental Fee Commission to attempt to reconcile the differences.
4. If the President and the Incidental Fee Commission do not reach agreement within five working days, either party may request a hearing before the hearing board. Within five working days of the request for a hearing, the hearing board will conduct a hearing and, within five working days thereafter, will make written findings of fact and recommendations for resolutions of the disagreement and will provide such findings and recommendations to both parties. Both parties will notify the hearing board and each other within five working days, in writing, whether they accept or reject the recommendations of the hearing board.
 - a) The hearing board will consist of five members. Prior to November 1 of each year, the President of the university will appoint two members, the ASOIT President will appoint two members, and both parties will compile a list of five persons mutually acceptable to sit on the hearing board. In the event a hearing is requested, the parties will select the fifth hearing board member from this list.
 - b) The President of the university and the Incidental Fee Commission will be given notice of the time and place of the hearing at least 24 hours before the hearing. All meetings of the hearing board will be open to the public and appropriate notice will be given.

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- c) The chair of the Incidental Fee Commission and the President of the university (or designee) will present relevant information to members of the hearing board.
5. The recommended amount of the incidental fee for the university will be made by the President to the Chancellor. A representative of the Incidental Fee Commission may appeal to the Chancellor the recommendations of the President of the university regarding the amount of the incidental fee or the allocation among the three major categories listed in this policy. Allocations among programs and activities within a major category are not subject to appeal. The Chancellor will order a timely review of the appeal and will communicate to the parties involved, a decision, in writing, within a reasonable time.
6. The Chancellor will recommend to the Board of Higher Education an incidental fee for the university. Representatives of the Incidental Fee Commission, as well as other members of the public may appear in support of, opposition to, or to request modification of the recommended incidental fee in accordance with the provisions of OAR 580-01-005. The Board will concurrently consider appeals of the substantial unresolved differences in the allocation of incidental fees among the three major categories. Except in extraordinary circumstances or upon its motion, the Board will not consider allocations within a major category.
7. Within ten working days after final action by the Board, the President of the university will confer with the Incidental Fee Commission in making any adjustments in the allocations and will communicate the final action of the Board and the President in writing to the Incidental Fee Commission.

Over-realized Fees

When the actual amount of incidental fees collected exceeds the budgeted amount, the additional revenue is called overrealized fees. This could be the result of actual enrollment being greater than the projected enrollment or other factors. The Incidental Fee Commission reserves the right to meet in the event of over-realized fees to determine allocation, generally distribution to the major categories will be in accordance with the same schedule and percentages as those established for allocating the budgeted incidental fees. Each program will adjust its budget accordingly.

Under-realized Fees

When the actual amount of incidental fees collected is less than the budgeted amount, the reduction in revenue is called underrealized fees. This could be the result of actual enrollment being smaller than the projected enrollment or other causes. In the event of underrealized fees, the full budgeted amount is not available and a reduction must be made. The actual revenue is distributed to the major categories in accordance with the same schedule and percentages as those established for allocating the budgeted incidental fees. Each program will adjust its budget accordingly.

Recommended:

ASOIT- 4/8/08
President's Council – 4/14/10

Approved: _____


Christopher G. Maples, President

Date: _____

August 13, 2010