*Formal Reconciliation Request*

# Student Success Fee Vital Technologies

| *Associated Students, Inc.* |

## Formal Transmittal and Request

To University President Dr. Berenecea Johnson Eanes, Vice President for Administration and Finance and Chief Financial Officer/Student Fee Advisory Committee (SFAC) Chair Claudio Lindow, Provost and Vice President for Academic Affairs/Resource Allocation Advisory Committee (RAAC) Chair Heather Lattimer, and Chief Information Officer Berhanu Tadesse:

I submit this formal Student Success Fee reconciliation request in my capacity as Cal State LA Associated Students, Inc. Vice President for University Affairs, on behalf of Cal State LA Associated Students, Inc. and the Cal State LA student body. My responsibility is to advocate for students, ensure that student voices are represented in University decision-making, and promote transparent accountability for mandatory fees paid by every student.

Student Success Fee revenue is mandatory Category II fee revenue. It is not discretionary institutional money. It is collected from students for identified student-success purposes and is subject to campus procedure, CSU policy, and California Education Code requirements for student-majority oversight, annual reporting, and transparent online accountability. Transparency from University administration is therefore not a courtesy, but an essential condition of shared governance.

Cal State LA currently posts Budget Administration allocation summaries and year-end accounting reports. Those documents are useful, but they do not show whether RAAC held the required open review, whether RAAC made recommendations to the President, whether the President responded, whether SFAC completed its annual review, or whether the required student-majority allocation oversight took place. ASI has experienced, on multiple occasions, refusal or unwillingness to convene SFAC, and RAAC has not provided students with the committee records, transfer records, supporting invoices, or outcome assessments needed to understand the Vital Technologies expenditures. The published FY 2024-2025 report also contains repeated vendors, project-purpose mismatches, unexplained budget revisions, large unused balances, descriptions that appear broader than the approved student purpose, and continued allocation for inactive or discontinued projects. We understand these issues may have legitimate explanations. All we ask of the University is to provide those explanations with records and not rely on generalized assurances.

For the reasons stated above, Cal State LA Associated Students, Inc. and the Cal State LA student body respectfully request a complete written response, production of the records listed in this report, immediate restoration of the required RAAC and SFAC processes, and a public student-facing reconciliation of the FY 2023-2024, FY 2024-2025, and FY 2025-2026 Vital Technologies allocations.

## 1. Report Summary

This report finds that Cal State LA appears not to be meeting required Student Success Fee governance and transparency duties unless the University can promptly produce records demonstrating that the required processes occurred. The concerns we have are both procedural and documentary. They include the following:

i. The absence of evidence that RAAC reviewed and recommended the proposed allocations through announced open meetings.
ii. The refusal or unwillingness to meet with SFAC and allow the committee to receive and review the required annual report.
iii. The absence of RAAC and SFAC committee minutes, presidential responses, financial access, and outcome reporting.
iv. The lack of detailed online accountability showing how significant reallocations and changed project uses were decided.

California State University Executive Order 1102 states appropriate and meaningful consultation regarding Category II fees, and the use of fee revenue is critical. It requires a student-majority Campus Fee Advisory Committee, fee reporting to that committee, and transparent online Student Success Fee accountability. California Education Code section 89712(d) requires majority student representation in Student Success Fee allocation oversight groups, an annual campus report to the Chancellor, and uniform, transparent, online accountability in the decision-making process together with a detailed accounting of allocations. Cal State LA Administrative Procedure 205 requires annual RAAC budget review, RAAC recommendations, presidential consideration and notification, financial statements, outcome assessments, and annual SFAC review. Administrative Procedure 212 requires RAAC to announce and hold open meetings.

### ASI Preliminary Findings

From the documentation available to the Cal State LA student body on the Cal State LA website, ASI has identified the following potential inconsistencies with applicable procedures, policies, CSU requirements, and shared-governance standards:

i. If RAAC did not review the proposed Student Success Fee budget annually and send recommendations to the President, the campus process appears inconsistent with AP 205 sections 6.4.1 and 7.3-7.5.
ii. If RAAC did not announce and hold open meetings to review the proposed resource allocation plan, the campus process appears inconsistent with AP 212 sections 6.2 and 7.2.8.
iii. If SFAC did not receive and review the annual Student Success Fee report, the campus process appears inconsistent with AP 205 sections 4.0, 6.7.1, and 7.7, and with CSU EO 1102 V.A's fee-advisory reporting requirement.
iv. If financial information requested by RAAC or SFAC was not provided, the campus process appears inconsistent with AP 205 section 6.6.4.
v. If no campus Student Success Fee allocation oversight group with majority student representation participated in allocations, the campus process appears to be not in compliance with California Education Code 89712(d)(1).

vi. If the University cannot show a transparent online process that explains how Student Success Fee allocation decisions were made, the campus process appears to be inconsistent with Education Code section 89712(d)(3) and CSU EO 1102 VI.B.10.
vii. CSU EO 1102 V.A requires reporting to the fee advisory committee that includes total revenue and unexpended balances. Large unused balances therefore require committee visibility and explanation.
viii. The FY 2024-25 report combines actual expenditures and encumbrances. Students need the underlying ledger to see what was actually paid, what remained committed, and what was later released.
ix. Multiple project codes require reconciliation because the reported purchase does not clearly match the project title or historical purpose, the same vendor/service appears under multiple codes, or the revised budget changed without a public transfer explanation.

Our objective is to ensure transparency between the University Administration and Cal State LA student body regarding Student Success Fee revenue allocation with sufficient explanations and documentation. We understand RAAC and SFAC are oversight and advisory bodies. We understand that those votes do not constitute final approval of every invoice or purchase. This report does not claim that every individual purchase required a committee vote. The concern is the absence of the required annual review, recommendation, reporting, open-meeting, student representation, and transparency process, as well as material changes that may have exceeded or departed from approved project purposes. With that being said, this report does not establish theft, fraud, or duplicate payment. This report only establishes unresolved discrepancies that require records, committee review, and public explanation.

## 2. History, Purpose, and Scope

### 2.1 History

Cal State LA established its Student Success Fee in fall quarter 2012 under the authority of CSU EO 1070. The University states that the fee supports supplemental academic advising and retention services, increased student development opportunities and career services, and expanded student access to vital infrastructure and application technologies. Campus records from the fee's adoption explain that it was intended to improve advising, retention and graduation, expand technology access, and strengthen career and graduate school preparation.

The fee classification and the campus spending categories are different concepts. The Student Success Fee itself is a Category II campus-based mandatory fee. Cal State LA organizes its Student Success Fee spending into three principal program areas.

| Cal State LA Program Area | Primary Purpose |
| --- | --- |
| **Advising & Retention** | Supplemental advising, tutoring/mentoring, retention, completion, and related academic support services. |

| | |
|---|---|
| **Student Development and Career Services** | Expanded student development, wellness/support, career preparation, and other student success services. |
| **Vital Technologies** | Expanded access to infrastructure, software, digital tools, connectivity, security, and technology-enabled student services. |

This report does not assume that technology spending is improper, and it does not conclude that the other Student Success Fee program areas are compliant merely because they are outside this report's scope. Among the publicly available documentation reviewed, Vital Technologies presented the greatest concentration of recurring inconsistencies requiring transaction-level reconciliation including repeated vendors across project codes, purchases that do not clearly match project titles or historical purposes, material budget revisions without public transfer details, combined "Actuals + Encumbrances" reporting, large unused balances, continuing allocations for inactive or discontinued projects, limited public outcome, and committee review records. Focusing on one program area also allows project by project comparison of the FY 2019-20 original proposals, FY 2023-24 and FY 2024-25 year-end reports, and the FY 2025-26 funding proposal without overstating what the public record can establish.

Because the Student Success Fee is mandatory, current California law and CSU policy require student representation, annual reporting, and transparent online accountability for Student Success Fee allocation decisions. Those requirements are the reason this report evaluates both the financial records and the process used to review and explain them.

**2.2 Purpose**

The purpose of this report is to obtain a complete reconciliation of Vital Technologies Student Success Fee activity and to restore a transparent, documented process in which students can verify how mandatory fee revenue was proposed, reviewed, approved, spent, assessed and carried forward. A satisfactory response requires more than a narrative explanation. It must link each project code to the approved proposal, responsible cost center, funding decision, budget-transfer journal, vendor contract or payroll allocation, actual expenditure, encumbrance, student-benefit metric, unspent balance disposition, and applicable RAAC and SFAC record. Transparency directly affects student welfare. When students cannot see the decision record, they cannot determine whether fee revenue is funding current students' needs, whether inactive programs continue to reserve money, whether project purposes have changed, or whether general institutional costs have been shifted to them. Lack of transparency also undermines trust between students and the University Administration, even when an expense may ultimately be legitimate.

**2.3 Scope**

The FY 2024-25 Vital Technologies funding proposal contains 19 project codes. There are 16 under Information Technology Services and 3 under IT Security and Compliance. Because several of the entries overlap, this report analyzes all 19 project codes. This report also compares selected FY 2024-25 explanations with the detailed FY 2019-20 project proposals, the FY 2023-24 year-end report, and the FY 2025-26 funding proposal.

## 3. Governing Law, CSU Policy, and Cal State LA Procedures

### 3.1 California Education Code section 89712

Education Code section 89712 identifies a Student Success Fee as a Category II campus-based mandatory fee. Subdivision (d) requires the Chancellor to ensure that each campus has majority student representation in Student Success Fee allocation oversight groups, submits an annual Student Success Fee report to the Chancellor, and provides uniform, transparent, online accountability in the decision-making process together with a detailed account of allocation. These requirements are broader than simply posting a final total. The statute addresses both decision-making and accounting. Students must be able to identify the oversight group, its student membership, meeting agendas, approved minutes, proposals reviewed, recommendations made, final decisions, and resulting expenditures.

### 3.2 CSU Executive Order 1102 – Category II Governance and Accountability

CSU EO 1102 governs Category II fees and contains specific Student Success Fee accountability rules.

| EO 1102 Section | Rule | Why It Matters |
|---|---|---|
| **II.B** | Category II fees are campus mandatory fees required to enroll or attend. | The Student Success Fee is mandatory Category II revenue, not ordinary discretionary funding. |
| **III.B-C** | The Chancellor has establishment authority for Category II fees. The President has oversight and adjustment authority but cannot establish a new Category II fee. | The President is responsible for campus oversight, but that authority is limited by CSU policy. |
| **IV.A.1-3** | The President must establish a Campus Fee Advisory Committee. Student representatives are appointed by the student body association and must be a majority of voting members. | Cal State LA must maintain a functioning student majority fee advisory body. |
| **IV.B** | Meaningful consultation regarding Category II fees and the use of fee revenue is critical. | The CSU policy ties consultation to the use of Category II fee revenue, not only fee collection. |

| | | |
|---|---|---|
| **V.A** | The President must provide the fee advisory committee a report of Categories II-V fees, including total revenue and unexpended balances. | SFAC must receive enough information to see revenue and unused balances. |
| **V.B** | Each campus must report annually to the Chancellor on Categories II-V fees, including rates, revenue, and remaining balances. | The campus must be able to produce the annual Chancellor report. |
| **VI.B.10** | Each campus must have a transparent online accountability protocol explaining Student Success Fee decision-making and allocations, with annual reporting to the Chancellor and public by October 15. | A public allocation spreadsheet alone is not enough if the decision process and allocation changes are not clear. |

**3.3 Cal State LA Administrative Procedure 204 – Student Fee Policy/SFAC**

Administrative Procedure 204 establishes Cal State LA's campus student fee policy and Student Fee Advisory Committee (SFAC) responsibilities. It provides the following:

i. AP 204 section 6.1.1 requires the President to establish the Fee Advisory Committee and designate the Vice President for Administration and CFO as chair.
ii. AP 204 section 6.1.6 requires the President to provide the Fee Advisory Committee a report of Category II-V fees, including total revenue and unexpended balances.
iii. AP 204 section 6.2.1 makes the Vice President for Administration and CFO the President's representative and chair of the Fee Advisory Committee.
iv. AP 204 section 6.2.3 requires an annual Chancellor's Office fee report, subject to presidential approval, covering the completed fiscal year, fee revenue, and remaining balances.
v. AP 204 section 6.3.1 gives three of five Fee Advisory Committee seats to ASI/student representatives, consistent with CSU EO 1102's student-majority rule.
vi. AP 204 section 6.3.3 gives the committee an advisory role regarding proposed Category II and III fee actions.

**3.4 Cal State LA Administrative Procedure 205 – Student Success Fee**

i. AP 205 section 4.0 states that the fee supports supplemental advising/retention, increased student development/career services, and expanded student access to vital infrastructure and application technologies, and requires an annual report to SFAC and RAAC.
ii. AP 205 section 6.1 requires the President to review RAAC funding recommendations and notify RAAC of the decision.
iii. AP 205 section 6.2 requires the CFO to review and forward final Student Success Fee funding requests to RAAC.

iv. AP 205 section 6.3.4 requires annual assessments that detail outcomes and accountability for Student Success Fee funds.
v. AP 205 section 6.4 requires RAAC to review and make annual proposed budget recommendations and receive an annual Student Success Fee report.
vi. AP 205 section 6.5 requires the RAAC chair to coordinate meetings, support production of meeting minutes, and forward recommendations to the President.
vii. AP 205 section 6.6 requires Budget Administration/Financial Services to maintain revenue and expenditure records, prepare quarterly and year-end statements, and provide financial information to RAAC and SFAC when required or requested.
viii. AP 205 sections 6.7.1 and 7.7 require SFAC to review a report on Student Success Fee use annually.
ix. AP 205 sections 7.3-7.5 require the CFO to submit the funding proposal summary to RAAC, RAAC to review and make final recommendations, and the President to review the recommendations and notify the RAAC chair.

### 3.5 Cal State LA Administrative Procedure 212 – Resource Allocation/RAAC

i. AP 212 sections 6.2 and 7.2.8 require RAAC to announce and hold open meetings to review the proposed Resource Allocation Plan and submit recommendations to the President.
ii. AP 212 section 7.2.9 requires the President to review the recommendations and act.
iii. AP 212 section 7.2.10 requires Budget Administration to publish the approved Resource Allocation Plan.
iv. AP 212 section 7.2.11 identifies RAP-2E as the annual Student Success Fee budget request form and requires RAP-6 accountability reports for SSF and other funds. RAP-6 is due by October 1 for the prior fiscal year.

## 4. Apparent Process and Transparency Noncompliance

### 4.1 Failure to Convene Properly or Provide SFAC Annual Review

ASI has experienced, on multiple occasions, refusal or unwillingness to convene through SFAC to perform its annual Student Success Fee review. This is inconsistent with AP 205 sections 4.0, 6.7.1, and 7.7. It also conflicts with CSU EO 1102 V.A and AP 204 section 6.1.6, which require fee information, including revenue and unexpended balances, to be provided to the fee advisory committee. This concern is directed to the Vice President for Administration and CFO as SFAC chair under AP 204 section 6.2.1, and to the President, who must establish the committee under AP 204 section 6.1.1 and CSU EO 1102 IV.A.1.

### 4.2 Missing Annual Committee Report and Review Records

Cal State LA's public Student Success Fee page includes University-prepared allocation summaries and year-end reports. Those documents do not show the committee process itself. The University must produce the annual report provided to RAAC and SFAC, the meeting packet, minutes, attendance, recommendations, votes where applicable, and the President's response. If these records do not exist because the required reviews did not occur, that is a compliance problem under AP 205 and AP 212.

**4.3 Full Transparency and Access to Information**
AP 205 section 6.6.4 says Budget and Financial Services must provide financial information to RAAC and SFAC when required or requested. CSU EO 1102 VI.B.10 and Education Code section 89712(d)(3) require transparent online accountability for Student Success Fee allocation decisions. If student representatives request information needed to perform these duties and are denied or ignored, the required oversight cannot function.

**4.4 Ongoing Accountability and Outcome Reporting**
AP 205 section 6.3.4 requires annual assessments that detail outcomes and accountability. AP 212 section 7.2.11 requires a RAP-6 Accountability Report for Student Success Fee programs by October 1 for the prior fiscal year. CSU EO 1102 VI.B.10 requires annual Student Success Fee reporting to the Chancellor and public by October 15. The University must produce each required report for FY 2023-24 and FY 2024-25 and identify where it was published.

**4.5 Student-Majority Allocation Oversight**
The published policies create a structural question that must be answered. AP 205 gives RAAC the annual budget review and recommendation role, but AP 212's RAAC membership is not student-majority on its face. SFAC is student-majority under AP 204, but AP 205 describes SFAC's Student Success Fee role mainly as annual review of a report on use of funds. Education Code section 89712(d)(1) requires majority student representation in Student Success Fee allocation oversight groups. Cal State LA must show which body meets that requirement and how students had a majority role in allocation oversight.

**4.6 Campus Procedures Need to be Updated**
AP 204 and AP 205 still cite CSU EO 1054 and CSU EO 1070. CSU EO 1102 superseded CSU EO 1054 and added specific Student Success Fee accountability requirements. The University must update these procedures or publish a clear crosswalk showing how current CSU policy, CSU EO 1102, AP 204, AP 205, AP 212, and Education Code section 89712 work together.

## 5. FY 2024-25 Vital Technologies Financial Overview
The FY 2024-25 Vital Technologies proposal allocated $1,853,484 across 19 project codes.

| Original Allocation | Revised Budget | Actuals + Encumbrances | Available Balance |
|---|---|---|---|
| $1,853,484.00 | $1,913,521.49 | $1,631,646.21 | $281,875.28 |

The report's "Actual + Encumbrances" column combines two different account states. Students need separate actual-payment and encumbrance data. CSU EO 1102 V.A. makes total revenue and unexpended balances part of the fee advisory committee's accountability record, and AP 205 section 6.6 requires detailed revenue/expenditure records and quarterly/year-end statements.

### 5.1 Budget Changes Requiring Transfer Records

Several project budgets increased or decreased during FY 2024-25. The public report does not identify the source and destination of each change, the date of the transfer, or the approving official. Across the 19 codes, the revised budget is $60,037.49 more than the original total. Students need the transfer journals to understand why.

| Project | Revision |
|---|---|
| R0021 | -$22,849.76 |
| R0023 | +$38,943.34 |
| R0024 | +$10,924.75 |
| R0030 | -$39,573.77 |
| R0037 | +$19,821.08 |
| T0071 | +$34,140.23 |
| T0072 | +$10,750.01 |
| T0077 | -$12,794.23 |
| Other Changed Codes | +$20,675.84 net |

A transfer is not automatically improper. The concern is that students cannot see who approved it, what project lost the money, what project gained it, whether the change occurred before or after the expense, and whether the changed use remained within the approved Student Success Fee purpose. CSU EO 1102 IV.B and VI.B.10, Education Code section 89712(d)(3), and AP 205's annual RAAC review/accountability rules make those items important.

## 6. Detailed Line-Item Review

Each item below states the public figures and identifies questions requiring records.

### 6.1 R0027 - Secure Password Alternatives

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $39,000.00 | $39,987.09 | +$987.09 | $39,987.09 | $0.00 |

#### Published Explanation

The year-end report states that funds paid for Duo multi-factor authentication, described as "Year 2 of 2."

### Why Reconciliation Is Required

- The revised budget increased by $987.09 and then exactly matched Actuals + Encumbrances, however, the transfer source and approval are not disclosed.
- The phrase “Year 2 of 2” suggests a defined contract term, yet the FY 2025-26 proposal again contains an R0027 allocation. The University must explain whether this is a renewal, extension, replacement, or copied description.
- Duo-related costs also appear under T0058 and T0074, so the components must be separated to rule out overlap.

### Documents and Answers Required

- Duo contract, invoices, term dates, license counts, and pricing schedule.
- Budget-transfer journal for the $987.09 increase.
- Reconciliation of R0027, T0058, and the Duo telephony and key costs in T0074.
- FY 2025-26 renewal justification and approval.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4.

### Assessment

Multi-factor authentication can directly support students and campus security. The concern is not the technology. The concern is overlapping project codes, the unexplained budget change, and the apparent continuation after a stated two-year term.

**6.2 T0058 – Two-Step Verification - Augment**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $1,000.00 | $4,000.00 | +$3,000.00 | $4,000.00 | $0.00 |

### Published Explanation

The year-end report states that the funds paid for Duo.com for two-step verification.

### Why Reconciliation Is Required

- The budget increased from $1,000 to $4,000 and exactly matched reported Actual + Encumbrances.
- The explanation does not distinguish this augmentation from the core Duo contract under R0027.

- A separate augmentation may be legitimate, but students need to know the specific service, quantity, and why it could not be charged to the base project.

### Documents and Answers Required

- Invoice and line-item description for the $4,000 charge.
- Transfer authorization for the $3,000 increase.
- Written distinction between T0058 and R0027 costs.
- Original augmentation approval and any recurring/carryforward authority.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4

### Assessment

This is a reconciliation issue. The University must show that the augmentation purchased a distinct component and was properly authorized.

**6.3 T0074 – Security Awareness Training**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $20,000.00 | $26,770.75 | +$6,770.75 | $23,288.64 | $3,482.11 |

### Published Explanation

The year-end report lists Cofense PhishMe renewal, a cybersecurity-awareness tabling event, Duo telephony credits, and 250 Microsoft-compatible multi-factor authentication keys.

### Why Reconciliation Is Required

- Phishing simulation and awareness events fit the project title, however, Duo phone credits and physical authentication keys are security infrastructure.
- The revised budget increased by $6,770.75 without a transfer explanation.
- Duo costs are already reported under R0027 and T0058, creating a three-code overlap.
- The report gives no student participation, training-completion, click-rate, or effectiveness metrics.

### Documents and Answers Required

- Vendor invoices separated among Cofense, event costs, telephony credits, and 250 keys.

- Asset inventory and distribution log for the keys, including student versus employee recipients.
- Budget-transfer journal and authorization for the increase.
- Training participation and outcome assessment required by AP 205 section 6.3.4.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4
- If the reported purchase differs from the approved project purpose, Education Code section 89712(d)(3) and CSU EO 1102 VI.B.10 make the decision process and allocation change a transparency issue that must be explained and documented.

### Assessment

The awareness components are facially appropriate. The infrastructure components require a documented project-purpose amendment or transfer and a clear student-benefit allocation.

**6.4 R0004 – MyTools Support**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $40,000.00 | $40,000.00 | $0.00 | $37,366.76 | $2,633.24 |

### Published Explanation

The year-end report says the funds purchased unspecified licenses and software that help students stay connected, organized, and informed.

### Why Reconciliation Is Required

- The description does not identify a vendor, product, quantity, contract period, or amount by license.
- The original project was for technical support, health checks, uptime, and support for the MyTools virtual application environment. However, the current narrative is broader and less specific.
- R0021 also funds application delivery and virtualization, creating functional overlap.

### Documents and Answers Required

- Complete vendor and license list with amounts and contract terms.
- MyTools usage, uptime, support-ticket, and student access metrics.
- Written distinction between R0004 support and R0021 application-delivery costs.
- Any purpose amendment or transfer approval.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4

### Assessment

The expense may be appropriate, but the public explanation is too generic to establish that it remained within the approved MyTools support purpose.

**6.5 R0005 Support Services for Microsoft Technologies**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $87,392.00 | $87,392.00 | $0.00 | $0.00 | $87,392.00 |

### Published Explanation

The year-end report states that the funds were not used and would be used the next year for Microsoft Premier Support.

### Why Reconciliation Is Required

- A mandatory fee allocation produced no reported FY 2024-25 service while reserving $87,392.
- The FY 2023-24 report also showed no expenditure after the project was adjusted to zero, and the FY 2025-26 proposal again lists $87,392.
- R0037 reports $128,646.42 for Microsoft Unified Enterprise Support, raising a direct overlap question.
- The statement that funds “will be used next year” does not explain whether the money was carried forward, reallocated, or merely left available.

### Documents and Answers Required

- Microsoft Premier/Unified support contracts and all invoices for FY 2023-24 through FY 2025-26.
- Carryforward schedule and fund-balance detail for R0005.
- Reconciliation explaining the difference between R0005 and R0037.
- RAAC recommendation and presidential approval for repeating the FY 2025-26 allocation.
- Any procurement schedule, contract delay, or cancellation record explaining nonuse.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4
- CSU EO 1102 V.A also requires reporting to the fee advisory committee that includes total revenue and unexpended balances.

### Assessment

Repeatedly reserving student fee revenue for an unused project is a high-priority governance issue. It may be legitimate if tied to a delayed contract, but students need a documented timeline and proof that the allocation was not duplicated under R0037.

**6.6 R0021 – Anywhere, On-Demand Application Delivery**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $88,511.00 | $65,661.24 | -$22,849.76 | $54,123.65 | $11,537.59 |

### Published Explanation

The year-end report states the project purchases ChemDraw and Turbonomic software for virtualization.

### Why Reconciliation Is Required

- The budget was reduced by $22,849.76 without identifying the destination of the transferred funds.
- ChemDraw may be delivered through the virtual environment and Turbonomic may manage the infrastructure, but the report does not disclose how each does so or the amount of budget allocated to each.
- The original proposal supported MyTools application delivery and annual maintenance across a broader software catalog, which overlaps with R0004.
- No student usage, application-launch, uptime, or license-utilization metrics are provided.

### Documents and Answers Required

- ChemDraw and Turbonomic contracts, invoices, quantities, and license terms.
- Transfer journal for the $22,849.76 reduction, including destination code and approval date.
- MyTools application catalog and utilization report.
- Cost-allocation explanation distinguishing R0021 from R0004.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4
- For material budget changes, AP 205 sections 6.4.1 and 7.3-7.5 require the annual SSF proposal to go through RAAC review and recommendation before the President acts. AP 212 section 7.2.8 requires announced, open RAAC review of the proposed resource allocation plan.

### Assessment

The reported products can fit a virtual application-delivery environment, but the material budget reduction, overlap, and absence of usage data require reconciliation.

**6.7 R0022 – Anywhere, Anytime Access**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $21,976.00 | $21,976.00 | $0.00 | $15,016.50 | $6,959.50 |

### Published Explanation

The year-end report states that the funds purchased a SAS statistical-analysis license for student coursework and research.

### Why Reconciliation Is Required

- The original approved project purpose was to secure off-campus access through an SSL virtual private network, not statistical software.
- SAS may be student-serving, but the public record does not show a purpose amendment, RAAC review, presidential decision, or transfer to an appropriate software project.
- Using an available project code for a different product prevents students from tracking whether the originally promised access service was maintained.

### Documents and Answers Required

- SAS contract, invoice, license count, beneficiaries, and usage data.
- Any approved amendment changing R0022 from VPN/access infrastructure to SAS.
- RAAC recommendation and presidential approval for the changed use.
- VPN contract and funding source for FY 2024-25, showing whether the original service continued.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4
- If the reported purchase differs from the approved project purpose, Education Code section 89712(d)(3) and EO 1102 VI.B.10 make the decision process and allocation change a transparency issue that must be explained and documented.

### Assessment

This is one of the clearest project-purpose mismatches. The expense may benefit students, but that does not establish authority to charge it to a VPN/access project without documented approval.

**6.8 R0023 – Just-In-Time Learning**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $60,147.00 | $99,090.34 | +$38,943.34 | $99,090.34 | $0.00 |

### Published Explanation

The year-end report states that funds renewed LinkedIn Learning for students, faculty, and staff and purchased equipment to update "electronic classes" around campus.

### Why Reconciliation Is Required

- The budget increased by $38,943.34 and exactly matched Actuals + Encumbrances.
- The original proposal was specifically for LinkedIn Learning/Lynda.com. The phrase “equipment to update electronic classes” is undefined and may be outside that purpose.
- T0057 also reports LinkedIn Learning, creating a duplicate-vendor question.
- Faculty and staff access to LinkedIn Learning may be legitimate if included at no extra cost or necessary for student instruction, but incremental employee costs, whether it increased the contract price, and how costs were allocated must be disclosed.

### Documents and Answers Required

- LinkedIn Learning contract, invoice, license counts by students/faculty/staff, and incremental pricing.
- Detailed equipment list, asset tags, location, purpose, and invoices.
- Transfer journal and authorization for the $38,943.34 increase.
- Reconciliation of all LinkedIn Learning costs under R0023 and T0057.

- Student usage, completion, and workforce-readiness outcome data.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4
- For material budget changes, AP 205 sections 6.4.1 and 7.3-7.5 require the annual SSF proposal to go through RAAC review and recommendation before the President acts. AP 212 section 7.2.8 requires announced, open RAAC review of the proposed resource allocation plan.
- If the reported purchase differs from the approved project purpose, Education Code section 89712(d)(3) and EO 1102 VI.B.10 make the decision process and allocation change a transparency issue that must be explained and documented.

### Assessment

The learning platform is facially appropriate. The unexplained increase, vague equipment purchase, and duplication with T0057 make this a very high-priority reconciliation item. Additionally, a campus-wide LinkedIn Learning license can be appropriate when the cost is directed to student access. Broad separately priced employee licenses for ordinary work would require a strong student-serving justification and proportional allocation.

## 6.9 R0024 – Wi-Fi Related/Maintenance

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $71,500.00 | $82,424.75 | +$10,924.75 | $82,424.75 | $0.00 |

### Published Explanation

The year-end report states that funds renewed and purchased servers supporting reliable Wi-Fi connectivity.

### Why Reconciliation Is Required

- The budget increased by $10,924.75 and exactly matched Actuals + Encumbrances.
- The report does not identify servers, their function, location, vendor, or whether they are dedicated to wireless service.
- T0040 separately funds Wi-Fi improvements, so maintenance and expansion costs must be separated.
- The original proposal contemplated usage and performance reporting, but no coverage, uptime, capacity, or student-use data are provided.

### Documents and Answers Required

- Server purchase orders, invoices, specifications, asset tags, and network function.
- Transfer journal and authorization for the $10,924.75 increase.
- Cost distinction between R0024 maintenance and T0040 Wi-Fi improvements.
- Wi-Fi performance, coverage, outage, capacity, and student-use metrics.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4.
- For material budget changes, AP 205 sections 6.4.1 and 7.3-7.5 require the annual SSF proposal to go through RAAC review and recommendation before the President acts. AP 212 section 7.2.8 requires announced, open RAAC review of the proposed resource allocation plan.

### Assessment

Wi-Fi infrastructure is a valid Vital Technologies purpose. The concern is insufficient detail and overlap.

**6.10 R0025 – Adobe Creative Suite/Cloud**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $252,694.00 | $252,694.00 | $0.00 | $252,694.00 | $0.00 |

### Published Explanation

The year-end report states that the full allocation purchases Adobe Creative Cloud to provide students with professional creative tools and digital skills.

### Why Reconciliation Is Required

- T0040 also states that it paid for Adobe Creative Cloud, but neither report discloses the amount charged to T0040.
- Faculty and staff access to Adobe Creative Cloud may be legitimate if included at no extra cost or necessary for student instruction, but incremental employee costs, whether it increased the contract price, and how costs were allocated must be disclosed.
- The report gives no activated-account counts, student usage, course integration, or cost-per-user information.
- A full allocation-to-expense match does not disclose whether the figure is an actual payment, an encumbrance, or both.

### Documents and Answers Required

- Adobe enterprise contract, invoice, payment record, and contract term.
- Eligible and activated license counts by student, faculty, staff, administrator, and auxiliary employee.
- Pricing model showing whether employee access created incremental cost.
- Amount of any Adobe cost charged to T0040 and the authorization for that coding.
- Student usage and outcome metrics.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4

### Assessment

A campus-wide Adobe license can be appropriate when the cost is directed to student access. Broad separately priced employee licenses for ordinary work would require a strong student-serving justification and proportional allocation.

**6.11 R0030 – 24-Hour Open Access Computer Lab**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $357,767.00 | $318,193.23 | -$39,573.77 | $314,473.41 | $3,719.82 |

### Published Explanation

The year-end report states that funds paid salaries and benefits for three full-time Annex Link employees and wages for student assistants working nights and weekends.

### Why Reconciliation Is Required

- The original proposal described four permanent staff and separated SSD-funded after-hours operations from regular business-hour support. The current report identifies three full-time staff without explaining the change.
- The public report does not show what percentage of each employee salary and benefit cost was charged to SSF or whether charges were limited to the supplemental after-hours service.
- The budget decreased by $39,573.77 without identifying where the funds went.
- T0056 is a separate lab-benefits augmentation that remained unused, while R0030 paid salary and benefits.
- No lab-hour, attendance, shift, or student-use data are provided.

### Documents and Answers Required

- Position titles, FTE percentages, salary and employer-benefit amounts charged to SSF, and other funding sources.
- Time-allocation method, schedules, and documentation distinguishing regular hours from nights/weekends.
- Student assistant payroll and shift records in aggregate.
- Transfer journal and authorization for the $39,573.77 reduction.
- Lab hours, closures, student counts, device-use data, and outcome assessment.
- Reconciliation with T0056.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4
- For material budget changes, AP 205 sections 6.4.1 and 7.3-7.5 require the annual SSF proposal to go through RAAC review and recommendation before the President acts. AP 212 section 7.2.8 requires announced, open RAAC review of the proposed resource allocation plan.
- Payroll and benefit charges must be tied to the approved Student Success Fee activity and documented through the annual outcomes/accountability process in AP 205 section 6.3.4.

### Assessment

Salary and related employer benefits can be legitimate SSF costs when the position directly delivers an approved supplemental service and charges are proportional. The University must show that students did not fund ordinary daytime operations or unrelated payroll.

**6.12 R0037 – Identity Management System**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $200,000.00 | $219,821.08 | +$19,821.08 | $128,646.42 | $91,174.66 |

### Published Explanation

The year-end report states that funds covered Microsoft Unified Enterprise Support for Azure, Microsoft 365, Dynamics, Windows Server, productivity, collaboration, and core business functions across all departments.

### Why Reconciliation Is Required

- The original project purpose was Microsoft Identity Manager maintenance and modifications. The current narrative is substantially broader.
- The phrase “core business functions across all departments” suggests general institutional operations, not solely expanded student access to vital technology.
- R0005 is separately allocated for Microsoft support, creating direct overlap.
- The budget increased by $19,821.08, while $91,174.66 remained available.
- The year-end report provides no allocation methodology separating student-facing, instructional, employee, administrative, and auxiliary use.

### Documents and Answers Required

- Microsoft Unified Enterprise Support contract, invoices, service catalog, and cost components.
- Written distinction between R0037 and R0005.
- Cost-allocation methodology by beneficiary and function.
- Purpose amendment and approval if R0037 expanded beyond identity management.
- Transfer journal for the increase, authorization, and disposition of the $91,174.66 balance.
- Evidence that SSF supplemented rather than replaced ordinary institutional IT funding.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4
- CSU EO 1102 V.A requires reporting to the fee advisory committee that includes total revenue and unexpended balances.
- For material budget changes, AP 205 sections 6.4.1 and 7.3-7.5 require the annual SSF proposal to go through RAAC review and recommendation before the President acts. AP 212 section 7.2.8 requires announced, open RAAC review of the proposed resource allocation plan.
- If the reported purchase differs from the approved project purpose, Education Code section 89712(d)(3) and CSU EO 1102 VI.B.10 make the decision process and allocation change a transparency issue that must be explained and documented.

### Assessment

This is one of the most serious substantive questions. Enterprise support may benefit students, but the public narrative is broad enough to suggest that mandatory student fees may be paying general University operating costs. Documentation is essential.

### 6.13 T0040 – Wireless/Wi-Fi Initiative

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $65,000.00 | $66,175.00 | +$1,175.00 | $66,175.00 | $0.00 |

#### Published Explanation

The year-end report describes Wi-Fi connectivity and states that funding was used for Adobe Creative Cloud.

#### Why Reconciliation Is Required

- The original project purpose was Wi-Fi improvements, access points, installation, surveys, and licensing. Adobe Creative Cloud is not a Wi-Fi expense.
- R0025 is the dedicated $252,694 Adobe project, creating an apparent duplicate-vendor/coding issue.
- The budget increased by $1,175 and exactly matched Actuals + Encumbrances.
- The narrative does not state what portion paid Wi-Fi and Adobe separately.

#### Documents and Answers Required

- Vendor-level ledger and invoices separated between Wi-Fi and Adobe.
- Wi-Fi equipment list, installation locations, access-point counts, and performance metrics.
- Amount and reason for any Adobe charge to T0040.
- Purpose amendment or transfer approval for the Adobe component.
- Transfer journal and authorization for the $1,175 increase.

#### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4
- For material budget changes, AP 205 sections 6.4.1 and 7.3-7.5 require the annual SSF proposal to go through RAAC review and recommendation before the President acts. AP 212 section 7.2.8 requires announced, open RAAC review of the proposed resource allocation plan.
- If the reported purchase differs from the approved project purpose, Education Code section 89712(d)(3) and CSU EO 1102 VI.B.10 make the decision process and allocation change a transparency issue that must be explained and documented.

### Assessment

Charging Adobe to a Wi-Fi code is a facial project-purpose mismatch unless it reflects a documented transfer or reporting error. This issue must be reconciled publicly.

**6.14 T0041 – GETmobile/Mobile Application Enhancements**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $250,000.00 | $250,000.00 | $0.00 | $227,989.41 | $22,010.59 |

### Published Explanation

The year-end report states that project funded GETmobile, Ready Education, CollegeNET scheduling/operational efficiency, and Qualtrics for academic research.

### Why Reconciliation Is Required

- The original project purpose centered on GETmobile and mobile application enhancements.
- Ready Education may be related to the mobile platform, however, CollegeNET and Qualtrics are not self-evidently mobile-app enhancements.
- CollegeNET may serve general scheduling/administrative operations, and Qualtrics may serve faculty or institutional research. A student-benefit allocation is not provided.
- The FY 2023-24 report showed spending of $340,448.21 against a $250,000 adjusted budget, while FY 2024-25 left $22,010.59. This volatility requires contract and carryforward reconciliation.
- No download, active-user, feature-use, survey-use, or student-outcome data are provided.

### Documents and Answers Required

- Separate contracts and invoices for GETmobile, Ready Education, CollegeNET, and Qualtrics.
- Product-by-product purpose, user population, and allocation methodology.
- Any approval to broaden the project beyond GETmobile.
- FY 2023-24 overage funding source and FY 2024-25 balance disposition.
- Student usage and outcome metrics for each platform.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4

- If the reported purchase differs from the approved project purpose, Education Code section 89712(d)(3) and CSU EO 1102 VI.B.10 make the decision process and allocation change a transparency issue that must be explained and documented.

#### Assessment
A large project code must not become a catch-all for unrelated software. The University must tie each vendor to the approved student mobile purpose or identify the authorized reallocation.

### 6.15 T0056 – 24-Hour Open Access Lab - Augment

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $9,978.00 | $9,978.00 | $0.00 | $0.00 | $9,978.00 |

#### Published Explanation
The year-end report repeats the R0030 staffing explanation but states that the funds were not used. It is identified as a $9,978 staff-benefits augmentation.

#### Why Reconciliation Is Required
- The same lab explanation appears under R0030 and T0056 even though T0056 had zero expenditure.
- T0056 showed no spending in FY 2023-24 and appears again in the FY 2025-26 proposal.
- The original augmentation was described as one-time, yet it continues to appear as a recurring allocation or balance.
- R0030 paid salaries and benefits, making the continuing need for this separate benefit augmentation unclear.

#### Documents and Answers Required
- Original approval and all carryforward records for T0056.
- Explanation of whether the same $9,978 is repeatedly carried forward or newly allocated each year.
- Reconciliation with benefits charged under R0030.
- Disposition of the FY 2024-25 balance and FY 2025-26 allocation decision.
- RAAC recommendation and presidential approval for continued funding.

#### Policy Reference
- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4

- CSU EO 1102 V.A requires reporting to the fee advisory committee that includes total revenue and unexpended balances.

#### Assessment
There is no evidence of double expenditure because T0056 reports zero actuals plus encumbrances. The concern is a dormant, nominally one-time allocation that persists without a current service or clear disposition.

### 6.16 T0057 – On-Demand Learning - Augment

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $41,853.00 | $50,596.00 | +$8,743.00 | $50,596.00 | $0.00 |

#### Published Explanation
The year-end report states that funds paid for SenSource foot-traffic sensors for the 24-hour lab and for LinkedIn Learning available to students, faculty, and staff.

#### Why Reconciliation Is Required
- The historical purpose was an augmentation for LinkedIn Learning/Lynda.com. Foot-traffic sensors are more related to the lab project.
- R0023 separately pays for LinkedIn Learning, creating a duplicate-vendor question.
- The budget increased by $8,743.00 and exactly matched actuals plus encumbrances.
- The report says sensors measure utilization but does not provide the resulting utilization data.
- Employee access requires incremental-cost and student-purpose disclosure.

#### Documents and Answers Required
- SenSource contract, invoice, sensor count, asset locations, and installation records.
- LinkedIn Learning invoice amounts charged to R0023 and T0057.
- Purpose amendment or transfer approval for the sensors.
- Transfer journal and authorization for the +$8,743.00 increase.
- Foot-traffic data and resulting management decisions.
- License counts and usage by student versus employee.

#### Policy Reference
- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4.

- For material budget changes, AP 205 sections 6.4.1 and 7.3-7.5 require the annual SSF proposal to go through RAAC review and recommendation before the President acts. AP 212 section 7.2.8 requires announced, open RAAC review of the proposed resource allocation plan.
- If the reported purchase differs from the approved project purpose, Education Code section 89712(d)(3) and CSU EO 1102 VI.B.10 make the decision process and allocation change a transparency issue that must be explained and documented.

### Assessment

This line combines two distinct purposes under a learning augmentation code. It requires vendor-level reconciliation and proof of authorization.

**6.17 T0071 – Accessibility Improvements**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $140,000.00 | $174,140.23 | +$34,140.23 | $174,140.23 | $0.00 |

### Published Explanation

The year-end report lists accessibility software, consulting, document remediation, captioning, student assistants, and services benefiting students, faculty, and staff.

### Why Reconciliation Is Required

- The budget increased by $34,140.23 and exactly matched actuals plus encumbrances.
- Accessibility services can directly support student success, but the University also has independent accessibility obligations. Students need assurance that SSF supplemented rather than replaced ordinary compliance funding.
- The narrative combines multiple vendors and employee populations without amounts or an allocation method.
- No number of documents remediated, videos captioned, courses supported, students served, or turnaround time is provided.

### Documents and Answers Required

- Vendor-by-vendor invoices and service descriptions.
- Student assistant payroll and duties in aggregate.
- Cost-allocation method for student, faculty, staff, administrative, and public-facing accessibility work.
- Prior-year general-fund/accessibility funding showing whether SSF supplanted existing resources.
- Transfer journal for the $34,140.23 increase and project outcome metrics.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4
- For material budget changes, AP 205 sections 6.4.1 and 7.3-7.5 require the annual SSF proposal to go through RAAC review and recommendation before the President acts. AP 212 section 7.2.8 requires announced, open RAAC review of the proposed resource allocation plan.
- If the reported purchase differs from the approved project purpose, Education Code section 89712(d)(3) and CSU EO 1102 VI.B.10 make the decision process and allocation change a transparency issue that must be explained and documented.

### Assessment

Accessibility is a legitimate student-success purpose when it expands or improves access. The University must show that mandatory student fees did not simply replace costs it was already required to fund institutionally.

**6.18 T0072 – Digital Writing Tool - Grammarly**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $36,000.00 | $46,750.01 | +$10,750.01 | $46,750.01 | $0.00 |

### Published Explanation

The year-end report states that funds paid for Grammarly Education to help students improve writing and communication.

### Why Reconciliation Is Required

- The budget increased by $10,750.01, nearly 30%, and exactly matched Actuals + Encumbrances.
- The report does not disclose license count, active users, cost per user, contract term, or reason for the increase.
- Employee eligibility, if any, is not identified.

### Documents and Answers Required

- Grammarly contract, invoice, payment status, license count, and pricing tier.
- Transfer journal and approval for the $10,750.01 increase.
- Student activation, usage, retention, and outcome data.
- Eligibility list and incremental cost for any nonstudent users.

### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4.
- For material budget changes, AP 205 sections 6.4.1 and 7.3-7.5 require the annual SSF proposal to go through RAAC review and recommendation before the President acts. AP 212 section 7.2.8 requires announced, open RAAC review of the proposed resource allocation plan.

### Assessment

The project purpose appears student-serving. The concern is the unexplained price/budget increase and lack of utilization evidence.

**6.19 T0077 – Student Hotspots**

| Original Allocation | Revised Budget | Change | Actual + Encumbrances | Available Balance |
|---|---|---|---|---|
| $70,666.00 | $57,871.77 | -$12,794.23 | $14,884.00 | $42,987.77 |

### Published Explanation

The year-end report gives a general statement that hotspots address the digital divide. It does not state that the program was discontinued, identify service dates, or report students served.

### Why Reconciliation Is Required

- The hotspot program was discontinued, but the published report does not disclose the discontinuation date or wind-down status. The University must identify the exact discontinuation date and explain why the code still shows FY 2024-25 spending and another FY 2025-26 allocation.
- Only $14,884 was reported as Actuals + Encumbrances, while $42,987.77 remained available.
- The FY 2023-24 report showed $89,073.08 in spending against a $70,666 budget. The FY 2025-26 proposal again lists $70,666 despite the reported discontinuation.
- The budget decreased by $12,794.23 without a disclosed destination.
- No device count, student count, service months, cancellation charges, or asset disposition is provided.

### Documents and Answers Required

- Exact suspension/discontinuation date and all notices or decisions.
- FY 2024-25 vendor contract, invoices, service months, cancellation documents, and any termination charges.
- Monthly number of active devices and students served.

- Device inventory and final disposition.
- Transfer journal for the $12,794.23 reduction and disposition of the balance.
- Explanation and approval for the FY 2025-26 $70,666 allocation.
- Reconciliation of the FY 2023-24 overage.

#### Policy Reference

- CSU EO 1102 IV.B (meaningful consultation regarding Category II fees and use of fee revenue)
- CSU EO 1102 VI.B.10 (transparent online accountability for Student Success Fee decisions and allocations)
- Cal State LA AP 205 sections 4.0, 6.3.4, 6.6.2-6.6.4
- CSU EO 1102 V.A requires reporting to the fee advisory committee that includes total revenue and unexpended balances.
- For material budget changes, AP 205 sections 6.4.1 and 7.3-7.5 require the annual SSF proposal to go through RAAC review and recommendation before the President acts. AP 212 section 7.2.8 requires announced, open RAAC review of the proposed resource allocation plan.

#### Assessment

A discontinued program must not continue to reserve or receive mandatory student-fee allocations without a clear wind-down or restart plan.

## 7. Cross-Cutting Concerns

### 7.1 Repeated Vendors/Overlapping Purposes

Using more than one project code for one vendor can be valid. What is missing is the contract component, invoice, amount, purpose, and proof that the same cost was not charged twice.

- Microsoft support appears under R0005 and R0037.
- Adobe Creative Cloud appears under the dedicated R0025 code and is also mentioned under T0040, a Wi-Fi project.
- LinkedIn Learning appears under R0023 and T0057.
- Wi-Fi costs appear under R0024 and T0040.
- 24-hour lab staffing/benefits appear under R0030 and the separate T0056 augmentation.
- Duo authentication costs appear under R0027, T0058, and part of T0074.

### 7.2 Mismatched Purchases, Project Titles, and Original Purposes

A project can change if the change is properly reviewed and approved. The problem is that the public report does not show the approval record. CSU EO 1102 IV.B says consultation regarding Category II fee revenue use is critical, and CSU EO 1102 VI.B.10 requires transparent online accountability for Student Success Fee decisions and allocations. AP 205 adds annual RAAC review and outcome/accountability duties.

- R0022: SAS software under an “Anywhere, Anytime Access” project originally tied to secure remote/VPN access
- T0040: Adobe under a Wireless/Wi-Fi initiative
- T0057: SenSource foot-traffic sensors under On-Demand Learning
- R0037: Broad Microsoft enterprise support under Identity Management
- T0041: CollegeNET and Qualtrics under GETmobile enhancements
- T0074: Duo telephony credits and hardware keys under Security Awareness Training
- R0023: Equipment under Just-In-Time Learning/LinkedIn Learning

**7.3 Revised Budgets with Exact Actuals + Encumbrances**
Several codes have revised budgets that exactly match Actuals + Encumbrances after an increase (R0027, T0058, R0023, R0024, T0040, T0057, T0071, and T0072). This can happen through normal year-end budget alignment. It also makes the transfer date and approval important. Students must be able to see whether the budget was changed before the purchase or adjusted after the fact to match it.

**7.4 Large Unused Balances**
Unused money is not automatically a violation. But CSU EO 1102 V.A specifically requires unexpended balances to be included in the report to the fee advisory committee. Students need to know whether these balances carried forward, reverted, were transferred, or remain reserved, and why.

- R0037: $91,174.66 available
- R0005: $87,392.00 available
- T0077: $42,987.77 available
- T0041: $22,010.59 available
- R0021: $11,537.59 available
- T0056: $9,978.00 available

**7.5 Salaries, Benefits, and Employee Software**
Student Success Fee money can pay salary and employer benefit costs when the position is legitimately part of an approved Student Success Fee program. The same principle applies to employee software access. Employee access may be reasonable when it is included at no extra cost or is needed to deliver the student service. What needs explanation is broad employee or administrative use that adds cost or replaces an ordinary University expense. AP 205 section 4.0 requires the money to serve the stated student-success purposes, and CSU EO 1102 IV.B makes the use of Category II fee revenue a consultation/accountability issue.

**7.6 Supplemental Student Service vs. General University Operations**
Several narratives refer to “core business functions,” operational efficiency, academic research, or services for faculty and staff. Those functions may indirectly help students, but AP 205 says the fee is for supplemental or expanded student services and technologies. The University must show the student-serving share, the cost-allocation method, and why another fund was not responsible for the general operating share.

### 7.7 Missing Measurable Outcomes

Many project narratives state a service supports students but do not show how many students used it, cost per student, availability, completion, satisfaction, or measurable results. AP 205 section 6.3.4 requires annual assessments that detail outcomes and accountability. AP 212 section 7.2.11 requires RAP-6 outcome accountability for SSF programs. Students must receive those records.

### 7.8 Missing Committee Review

Any one of the financial questions in this report could have a routine explanation. The problem is that the required student and committee oversight process has not been publicly demonstrated to be functional. If RAAC and SFAC had convened, student representatives could have asked these questions before or during the annual review. That is why regular committee meetings and full access to information are not procedural technicalities. They are the mechanism that protects student trust and Student Success Fee accountability.

## 8. Questions

### 8.1 University President Dr. Berenecea Johnson Eanes

1. Why have ASI requests to meet through RAAC and SFAC not resulted in the required committee process?
2. What steps did you take in FY 2023-24, FY 2024-25, and FY 2025-26 to make sure RAAC reviewed Student Success Fee funding proposals and made recommendations?
3. What written RAAC recommendations did you receive, and what written decisions or notices did you issue under AP 205 sections 6.1 and 7.5?
4. How did you ensure a functioning student-majority fee advisory committee under CSU EO 1102 IV.A.1-3 and AP 204?
5. Which campus group satisfies Education Code section 89712(d)(1)'s majority-student Student Success Fee allocation oversight requirement?
6. Who approved project-purpose changes and budget transfers identified in this report?
7. Will you direct a public reconciliation and restore regular RAAC/SFAC oversight now?

### 8.2 Provost and Vice President for Academic Affairs/Resource Allocation Advisory Committee (RAAC) Chair Heather Lattimer

1. On what dates did RAAC meet during FY 2023-24, FY 2024-25, and FY 2025-26?
2. Where were the meetings announced, and how were they open as required by AP 212 sections 6.2 and 7.2.8?
3. Who attended, was there a quorum, and was the ASI representative seated and given the full meeting packet?
4. Which Student Success Fee proposals, transfers, carryforward balances, and discontinued programs did RAAC review?
5. What recommendations did RAAC send to the President?

6. What is the schedule for restoring regular and ongoing RAAC meetings?

**8.3 Vice President for Administration and Finance and Chief Financial Officer/Student Fee Advisory Committee (SFAC) Chair Claudio Lindow**

1. On what dates did SFAC meet during the last two academic/fiscal years?
2. When did SFAC receive the annual Student Success Fee report required by AP 205 sections 4.0, 6.7.1, and 7.7?
3. When did SFAC receive the Category II fee report required by CSU EO 1102 V.A and AP 204 sections 6.1.6?
4. Why have ASI requests to convene or meet with SFAC not resulted in a functioning annual review?
5. What annual report was submitted to the Chancellor under CSU EO 1102 V.B, CSU EO 1102 VI.B.10, AP 204 section 6.2.3, and Education Code section 89712(d)(2)?
6. What immediate steps will be taken to restore regular SFAC meetings, full document access, and annual accountability?

**8.4 Budget Administration and Financial Services**

1. Provide the complete ledger, transfer journals, quarterly statements, year-end statements, encumbrance detail, carryforward detail, and reconciliation workpapers for every Vital Technologies code.
2. Explain every difference between original allocation and revised budget, including source, destination, date, reason, preparer, and approver.
3. Separate actual expenditures from encumbrances and show any encumbrances later released.
4. Identify how unspent balances were treated after year-end.
5. Provide the annual Student Success Fee reports and evidence of transmission to RAAC, SFAC, and the Chancellor.
6. Explain the control used to prevent Student Success Fee money from paying an unsupported share of general University operations.

**8.5 Information Technology Services and Chief Information Officer Berhanu Tadesse**

1. For every Vital Technologies code, identify the vendor, contract, invoice, product, quantity, beneficiary group, and student-use measure.
2. Explain every project-purpose mismatch and vendor overlap listed in Sections 6 and 7 of this report.
3. Identify the exact date the Student Hotspot program ended, all wind-down costs, and why T0077 appears again in FY 2025-26 if the program was not restarted.
4. For Adobe and other campus-wide licenses, identify the number and incremental cost of student, faculty, staff, administrator, and auxiliary accounts.
5. For payroll-funded programs, identify the positions, FTE percentage, salary/benefit allocation, and student-serving duties.
6. Provide the outcomes required by AP 205 section 6.3.4 and AP 212 RAP-6.

## 9. Requested Records and Immediate Action

This section requests both records and immediate corrective action. Producing records alone will not fix a Student Success Fee governance process that is not regularly functioning.

### 9.1 Immediate Action to Restore Campus Compliance

#### Regular and Ongoing Convening of SFAC and RAAC

a. The President should immediately direct the Provost and Vice President for Academic Affairs/RAAC Chair and the Vice President for Administration and Finance/CFO/SFAC Chair to convene their committees and publish a recurring 2026-27 meeting calendar.
b. RAAC must at minimum be convened to perform its annual Student Success Fee budget review and recommendation duties under AP 205 sections 6.4.1 and 7.3-7.5 and its announced/open review duties under AP 212 sections 6.2 and 7.2.8.
c. SFAC must at minimum be convened annually to review Student Success Fee use under AP 205 sections 6.7.1 and 7.7, and must receive the Category II fee information required by CSU EO 1102 V.A and AP 204 section 6.1.6.
d. Additional meetings should be held whenever needed to address major carryforwards, material project changes, significant transfers, or unresolved compliance issues.
e. ASI representatives must receive timely notice, full meeting materials, and a real opportunity to participate before recommendations are finalized.

#### Authority

- CSU EO 1102 IV.A, IV.B, V.A
- AP 204 sections 6.1.1, 6.2.1, 6.3.1
- AP 205 sections 6.4-6.7, 7.3-7.7
- AP 212 sections 6.2, 7.2.8.

#### Full Transparency and Access to Information

a. Provide RAAC and SFAC all financial information they need or request to perform their duties, as required by AP 205 section 6.6.4.
b. Create one public Student Success Fee accountability page that explains the decision process, lists the allocation oversight bodies and members, and links annual allocations, annual reports, outcomes, recommendations, presidential decisions, and detailed allocation/accounting records.
c. Publish RAAC meeting dates, agendas, packets, recommendations, and final decision records. Publish SFAC meeting dates, annual review materials, and findings. Posting these specific records is requested as a practical way to meet the broader transparency duties.
d. For material budget transfers or project-purpose changes, publish the amount, source code, destination code, reason, approval date, approving official, and updated student-serving purpose.

e. Provide a clear student-facing explanation of actual expenditures, encumbrances, carryforward balances, and unused funds.

### Authority

- Education Code section 89712(d)(3)
- CSU EO 1102 VI.B.10
- CSU EO 1102 V.A
- AP 205 section 6.6.4
- AP 212 sections 7.2.10-7.2.11

### Ongoing Accountability

a. Restore the annual RAAC proposed-budget review, RAAC recommendation, presidential response, and SFAC annual use review every year.
b. Produce the AP 205 section 6.3.4 annual outcome/accountability assessment for every funded project and the AP 212 RAP-6 Accountability Report for Student Success Fee programs.
c. Produce quarterly and year-end financial statements under AP 205 section 6.6.3 and review major unused balances and carryforwards with the appropriate student oversight bodies.
d. Complete and publish the annual Student Success Fee accountability reporting required by CSU EO 1102 VI.B.10 and the annual Chancellor reporting required by CSU EO 1102 V.B and Education Code section 89712(d)(2).
e. At the end of each year, publish a reconciliation showing original allocation, transfers, revised budget, actual expenditures, encumbrances, released encumbrances, carryforward, results, and explanation for any discontinued or materially changed program.
f. Correct any project descriptions, allocations, or public reports that are inaccurate after reconciliation.

### Authority

- Education Code section 89712(d)(2)-(3)
- CSU EO 1102 V.A-V.B and VI.B.10
- AP 205 sections 6.1, 6.3.4, 6.4, 6.6-6.7, 7.3-7.7
- AP 212 section 7.2.11

**9.2 Governance and Committee Records**

a. RAAC and SFAC rosters, appointment records, vacancies, terms, and voting status for FY 2023-24 through FY 2025-26.
b. All meeting notices, agendas, packets, presentations, attendance records, quorum records, minutes, recordings, votes, and recommendations.
c. All communications scheduling, canceling, postponing, declining, or responding to requests for RAAC or SFAC meetings.
d. All RAAC recommendations concerning Student Success Fee funding and all presidential decisions or responses.

**9.3 Required Annual Reports and Accountability Documents**

a. Annual Student Success Fee reports provided to RAAC and SFAC for FY 2023-24 and FY 2024-25.
b. Annual fee reports submitted to the Chancellor under CSU EO 1102 V.B and AP 204 section 6.2.3.
c. Annual Student Success Fee reports made public under CSU EO 1102 VI.B.10, including proof/date of publication.
d. AP 205 section 6.3.4 annual outcome/accountability assessments for all Vital Technologies projects.
e. AP 212 RAP-6 Accountability Reports for FY 2023-24 and FY 2024-25.
f. Any Chancellor's Office compliance guidance, review, questions, or correction requests concerning Cal State LA Student Success Fee reporting.

**9.4 Accounting Records**

a. Complete general ledger for every Vital Technologies project code for FY 2023-24, FY 2024-25, and FY 2025-26.
b. Separate actual expenditures, pre-encumbrances, encumbrances, released encumbrances, carryforward, and available balances.
c. Every budget-transfer journal, with source, destination, amount, date, reason, preparer, approver, and supporting approval.
d. Quarterly and year-end financial statements and reconciliation workpapers.
e. Fund-level schedules showing Student Success Fee revenue, total Vital Technologies allocation, carryforward, reserves, and unspent balance.

**9.5 Procurement and Vendor Records**

a. Contracts, amendments, purchase orders, invoices, receiving records, payment records, credits, refunds, cancellations, and vendor justification for all major Vital Technologies vendors.
b. Procurement method, bid records or sole-source justification where applicable.
c. Contract terms showing whether a service covered students only or also faculty, staff, administrators, and auxiliaries.

**9.6 Software and License Records**

a. License counts purchased, eligible users, activated users, unique student users, contract period, price, and cost per active student.
b. Separate student, faculty, staff, administrator, and auxiliary license counts and any incremental cost caused by employee access.
c. The method used to allocate shared enterprise-license costs to Student Success Fee funds.

**9.7 Equipment and Asset Records**

a. Asset description, serial number, asset tag, location, custodian, purchase date, acquisition cost, Student Success Fee code, and current status.

b. Records for servers, classroom/electronic-class equipment, SenSource sensors, Wi-Fi hardware, hotspot devices, and hardware authentication keys.

**9.8 Payroll and Benefits Records**

a. Position title, FTE, Student Success Fee-funded percentage, salary amount, employer benefit amount, other funding source, and allocation method.
b. Duty statements and work schedules sufficient to show the student-serving work tied to the fee, especially for the 24-hour lab.

**9.9 Usage and Outcome Records**

a. Adobe: student activations, active users, usage, cost per active student, and employee incremental cost.
b. LinkedIn Learning: student users, completions, course usage, cost per user, and split between R0023/T0057.
c. Grammarly: licenses, active student users, cost per active user, and renewal basis.
d. MyTools/ChemDraw/Turbonomic: app launches, student users, uptime, support tickets, and cost split.
e. Wi-Fi: access points/servers purchased, coverage, student device connections, reliability, and usage results.
f. GETmobile/Ready Education/CollegeNET/Qualtrics: vendor-by-vendor spending and student usage/outcomes.
g. 24-hour lab: hours, attendance, sensor results, student assistant hours, staffing costs, and after-hours allocation method.
h. Security programs: student participation, MFA usage, training outcomes, and distribution of keys.
i. Accessibility: documents/videos/courses remediated, students served, and division between student-facing and general institutional work.

**9.10 Student Hotspot Wind-Down Records**

a. Exact date the hotspot program was suspended or discontinued and all notices announcing the change.
b. FY 2024-25 T0077 ledger and every invoice/payment/encumbrance comprising the $14,884.
c. Vendor contract, cancellation records, termination charges, and final service period.
d. Number of devices active and students served by month.
e. Disposition of physical hotspot devices.
f. Disposition of the $42,987.77 remaining FY 2024-25 balance.
g. All transfers into or out of T0077.
h. Justification for another $70,666 FY 2025-26 allocation and any plan to restart or replace the program.

**9.11 Public Posting and Communications Records**

a. All documents posted to satisfy Education Code § 89712(d)(3) and CSU EO 1102 VI.B.10 for FY 2023-24 and FY 2024-25.

b. Internal instructions assigning responsibility for Student Success Fee online accountability.
c. Communications concerning corrections, late reports, missing reports, or decisions not to publish committee records.

## 10. Conclusion

Students pay the Student Success Fee because it is a mandatory Category II fee. They should be able to see how that money is reviewed, allocated, spent, assessed, and carried forward. The current public Vital Technologies reports do not provide enough information to answer the issues identified in this report. More importantly, ASI has not been provided records demonstrating that the required RAAC and SFAC processes have been functioning. If the University cannot produce records showing otherwise, Cal State LA appears not to be in compliance with several connected requirements:

- Education Code section 89712(d): majority-student Student Success Fee allocation oversight, annual reporting to the Chancellor, and transparent online allocation accountability.
- CSU EO 1102 IV.A and IV.B: a functioning student-majority Campus Fee Advisory Committee and meaningful consultation regarding Category II fee revenue use.
- CSU EO 1102 V.A-V.B: fee advisory committee reporting and annual Chancellor reporting that includes revenue and unexpended balances.
- CSU EO 1102 VI.B.10: transparent online Student Success Fee decision/allocation accountability and annual reporting to the Chancellor and public.
- Cal State LA AP 205: annual RAAC budget review and recommendations, presidential response, annual SFAC review, financial information access, quarterly/year-end statements, and annual outcome/accountability assessments.
- Cal State LA AP 212: announced and open RAAC meetings, presidential action on recommendations, publication of allocations, and RAP-6 accountability reporting.
- Cal State LA AP 204: establishment of the Fee Advisory Committee, student-majority membership, CFO chair responsibility, and annual Category II fee reporting.

The purpose of this request is not to assume misconduct. It is to make sure students can verify that mandatory Student Success Fee money is being used for the student purposes for which it was collected and that the University is following the rules that protect student participation and trust. Cal State LA should provide the records, answer every project question, restore regular and ongoing RAAC and SFAC meetings, give student representatives full access to information, correct any reporting or allocation problems found, and maintain ongoing public accountability going forward.

## Source Documents


California Education Code section 89712 - Student Success Fees
https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC§ionNum=89712

California State University, Los Angeles Student Fees
https://calstate.policystat.com/policy/18336631/latest/

CSU Executive Order 1102 - California State University Student Fee Policy (effective July 22, 2015; rev. Aug. 27, 2015) https://budget.sdsu.edu/_resources/files/eo1102.pdf

CSU Student Tuition and Fee Policy
https://calstate.policystat.com/policy/16681992/latest/

CSU About Student Success Fees
https://www.calstate.edu/apply/paying-for-college/csu-costs/student-success-fees/Pages/about.aspx

Cal State LA Administrative Procedure 204 - Student Fee Policy
https://www.calstatela.edu/sites/default/files/ap204.pdf

Cal State LA Administrative Procedure 205 - Student Success Fee
https://www.calstatela.edu/sites/default/files/ap205.pdf

Cal State LA Administrative Procedure 212 - University Resource Allocation Plan
https://www.calstatela.edu/sites/default/files/ap212_0.pdf

Cal State LA Student Success Fee public Page
https://www.calstatela.edu/budget/student-success-fee

Cal State LA 2026-27 Academic Senate Committee Membership List (RAAC membership)
https://www.calstatela.edu/academicsenate/handbook/ch2d#allocate

Cal State LA FY 2024-25 Student Success Fee - Vital Technologies allocation/funding proposal
https://www.calstatela.edu/sites/default/files/2024-25%20SSF%20Vital%20Technologies.pdf

Cal State LA FY 2024-25 Student Success Fee Year-End Report
https://www.calstatela.edu/sites/default/files/Student%20Success%20Fee%20FY%2024-25%20Year%20End%20Report.pdf

Cal State LA FY 2019-20 Vital Technologies proposal packet
https://www.calstatela.edu/sites/default/files/vital_technologies_2019-20.pdf

Cal State LA FY 2023-24 Student Success Fee Year-End Report
https://www.calstatela.edu/sites/default/files/Student%20Success%20Fee%20FY%2023-24%20Year%20End%20Report.pdf

Cal State LA FY 2025-26 Student Success Fee - Vital Technologies proposal
https://www.calstatela.edu/sites/default/files/2025-26%20SSF%20Vital%20Technologies.pdf