


THE CALIFORNIA STATE UNIVERSITY AND COLLEGES

Office of the Chancellor
400 Golden Shore
Long Beach, California 90802

Date: March 28, 1978

To: Presidents

From: Harry Harmon 
Executive Vice Chancellor

Subject: Instructionally Related Activities Fee --
Executive Order No. 290

I am transmitting to you five copies of Executive Order No. 290 which implements action taken by the Board of Trustees at the January 25, 1978 meeting in RFIN 1-78-1, part of which is codified in Section 41800.2 of Title 5. Also enclosed is letter BA 78-13/EPR 78-15 which sets forth the procedures for administration of the fee.

Legislation now pending would permit administration of the fee revenues through local trust accounts. If this legislation is passed, substantial modification of the fiscal aspects of these procedures may be required. Because it is critical that campuses take prompt action to assure Fall 1978 implementation, the attached procedures are being established without additional review. These procedures are similar to those which have been in place for administering general fund appropriations for instructionally related activities. Your comments and suggestions for improvement would be appreciated as we consider revisions for the future.

Note that the list of designated program areas includes all of those which have been approved to date under provisions of the Education Code. Campuses may not support additional

(More)

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areas until these have been authorized by the Chancellor. We do not believe it is practical to obtain approval of such additions in time for their inclusion in budget development for 1978-79. Therefore, this round of planning should be based upon the current list.

Funds generated by this fee or from the general fund appropriation may not be used for grants-in-aid.

Address questions concerning this Executive Order or the accompanying Procedures to the Chancellor with copies to the Chief, Division of Budget Planning and Administration, and the State University Dean, Educational Programs and Resources. The campus president is responsible for implementing executive orders where applicable and for maintaining the campus respository and index for all executive orders.

HH:mb
Attachments

THE CALIFORNIA STATE UNIVERSITY AND COLLEGES
Office of the Chancellor
400 Golden Shore
Long Beach, California 90802

Executive Order No.: 290
Title: Instructionally Related Activities Fee
Effective Date: March 28, 1978
Supersedes: No Previous Executive Order


This Executive Order is issued pursuant to action of the Board of Trustees in RFIN 1-78-1 part of which is codified in Title 5, *California Administrative Code*, Section 41800.2. The following procedures shall govern implementation of the Instructionally Related Activities fee in accordance with guidelines adopted by the Board of Trustees:

1. Upon a timely request therefor by the campus President, the Chancellor shall establish an Instructionally Related Activities (IRA) fee for the campus effective with the fall term 1978.
2. When so established, the fee shall be assessed of all regularly enrolled students. The fee shall be waived in cases where the Student Services fee is waived.
3. All funds collected by the campus shall be allocated to that campus and used solely for the support of instructionally related activities as defined in Education Code Section 89230 and by systemwide policy.
4. Income from the IRA fee as distinguished from other revenues shall not be expended on matters which are tuitional. Thus such income shall not be used to support faculty positions.
5. The level of the fee shall be established for each campus by the Chancellor upon recommendation of the campus President. Initially, the fee shall not exceed \$10 per academic year and shall not be increased beyond the \$10 level before the fall term 1981.
6. An advisory committee on instructionally related activities shall be formed on each campus to advise the campus President regarding both the level of the fee and allocation of fee revenue. The President shall establish the advisory committee with the number of students equaling the number of faculty and administrators combined. Faculty and administrators shall be appointed by the campus President after appropriate consultation. Student members shall be appointed by the President of the Associated Students according to established campus procedures. The President of the Associated Students or designee, as one of the student representatives, shall serve as Chair. On those campuses lacking an Associated Students' organization, procedures shall be developed by the campus President to provide for elected student representatives to serve on the advisory committee.
7. Should the campus wish to increase the fee beyond \$10 per academic year in or after fall 1981 a student referendum, called by the advisory committee, shall be held. The referendum shall be advisory to the committee and the campus President. Referenda to augment or reduce the fee shall be held no more than once in three years.
8. The Associated Students will no longer be expected to provide support for instructionally related activities on a regular basis. Any contracts between the Associated Students and the

campus concerning such funding should be reconsidered in light of the Instructionally Related Activities fee. It is understood, however, that the Associated Students may, at their discretion, support individual instructionally related projects.

9. When an IRA fee is implemented for a campus, the cost of insurance for extramural athletic activities formerly borne by the Associated Students of that campus (Education Code, Section 32220 et seq.; RFIN 61-3, October 6, 1961) shall be paid from the fee revenue.
10. Should any major change in instructionally related activities programming occur, the Chancellor, upon recommendation of the campus President, may reduce the fee to an appropriate support level.
11. Procedures for the collection and allocation of the IRA fee shall be developed by the Chancellor and issued by coded memoranda.

The provisions of this Executive Order and implementing procedures are to be reviewed by the Chancellor not later than fall 1981, and a report thereon is to be provided to the Board of Trustees.



Glenn S. Dumke, Chancellor

Date: March 28, 1978

THE CALIFORNIA STATE UNIVERSITY AND COLLEGES
Office of the Chancellor
400 Golden Shore
Long Beach, California 90802
(213) 590-5725

Code: BA 78-13
EPR 78-15

Date: March 28, 1978

To: Presidents

D. Dale Hanner
D. Dale Hanner
Vice Chancellor, Business Affairs

From: *Alex C. Sherriff*
Alex C. Sherriff
Vice Chancellor, Academic Affairs

Subject: Administrative Procedures:
Instructionally Related Activities Fee

These procedures are issued in accordance with (SAPEO #2).

I. Objectives

The Instructionally Related Activities Fee is to be established to provide support for essential educational experiences and activities that aid and supplement the fundamental educational mission of the institution.

The objectives of the Fee are:

- A. To ensure stable and adequate funding for instructionally related activities as defined herein.
- B. To reduce the demand on Associated Student Body funds for instructionally related activities so that the Student Body Fee can be used to underwrite authorized programs and services based on student priorities.
- C. To supplement General Fund appropriated instructionally related activity funds.

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II. Definition*

"Instructionally related activities" are those activities and laboratory experiences listed below which are at least partially sponsored by an academic discipline or department and which are, in the judgment of the president, integrally related to its formal instructional offerings.

Activities which are considered to be essential to a quality educational program and an important instructional experience for any student enrolled in the respective program may be considered instructionally related.

Instructionally related activities include, but are not limited to, the following categories. Inclusion of a particular activity on this list or in Education Code Section 89230 does not require a campus to fund that activity:

- A. Intercollegiate athletics: costs which are necessary for a basic competitive program, including equipment and supplies and scheduled travel, not now provided by the state. Athletic grants should not be included.
- B. Radio, television, film: costs related to the provisions of basic "hands-on" experience not now provided by the state. Purchase or rental of films as instructional aids shall not be included.
- C. Music and dance performance: costs to provide experience in individual and group performance, including recitals, before audiences and in settings sufficiently varied to familiarize students with the performance facet of the field.
- D. Drama and musical productions: basic support of theatrical and operatic activities sufficient to permit experience not only in actual

*This definition of instructionally related activities is consistent with that contained in Education Code Section 89230. However, that code section legally applies only to instructionally related activities funds appropriated by the Legislature.

performance but production, direction, set design and other elements considered a part of professional training in these fields.

- E. Art exhibits: support for student art shows given in connection with degree programs.
- F. Publications: the costs to support and operate basic publication programs including a periodic newspaper and other laboratory experience basic to journalism and literary training. Additional publications designed primarily to inform or entertain should not be included.
- G. Forensics: activities designed to provide experience in debate, public speaking, and related programs, including travel required for a competitive debate program.
- H. Other activities: activities associated with other instructional areas which are consistent with purposes included in the above may be added as they are identified and approved. Already identified and approved are:
 - (1) Model United Nations activities;
 - (2) Agricultural judging.

Direct requests for the addition of program areas not listed above to the State University Dean, Educational Programs and Resources. Such requests should include a thorough explanation of how the area meets the established definition of instructionally related activities and why it is considered important that it be added.

III. Establishment of Fee

Submit requests for establishment of the fee to the Chancellor with copies to the Dean, Educational Programs and Resources and Chief, Budget Planning and Administration. Include effective date, amount of fee per term, and the budget information described in Section V. Every effort should be made to submit requests for fall term implementation or changes by May 1.

IV. Financial Management

- A. Fee income will be deposited in the General Fund reimbursements.*

*Legislation is pending which would permit the use of local trust accounts. If that legislation is adopted, these Procedures will be amended accordingly.

- B. Fees collected in excess of expenditures revert to the General Fund at the end of the fiscal year.*
- C. Procedures for preparation and submission of budgets are described in Section V.
- D. Procedures for disbursement are described in Section VI.
- E. Expenditures may be handled by either of the following:
 - 1. Administer and account for funds through the Independent Operations program of the General Fund support budget. (This includes revenue from gate receipts.)
 - 2. Contract with an auxiliary organization (See BA 75-2).

V. Budgeting

Budgets should be prepared using actual expenditures for the previous years and estimated expenditures for the current year from all sources of IRA funding. The budget information provided to the Chancellor's Office must support the initial proposed fee level or any proposed future fee change. The format to be followed in submitting 1978/79 IRA budget information is provided on two forms identified as Attachment A and Attachment B.

The 1978/79 Governor's Budget will not be adjusted to reflect the new fee and related expenditures. However, in subsequent cycles provision will be made for their inclusion in campus submissions. The format will be set forth in budget note pages.

Implementation of the 1978/79 budget (fall 1978) will be handled administratively via the normal Request for Allocation Order process. Specific instructions will be issued prior to September.

*Legislation is pending which would permit the use of trust funds. If that legislation is adopted, these Procedures will be amended accordingly.

VI. Guidelines for Accounting**A. Expenditures Through the General Fund**

Expenditures for fee-supported Instructionally Related Activities should be recorded as General Fund expenditures in the Independent Operation Program under a new subprogram (fourth digit - code 7) entitled Instructionally Related Activities. When the expenditure is handled through the General Fund, the detail of all such activity will be recorded in the new subprogram. To facilitate retrieval and identification of costs, all currently assigned discipline codes may be used in this subprogram. Three examples of this coding would be as follows:

Football	01-7-7-6-7206-001-000
Contract	01-7-7-6-4998-005-000
Accounting Office	01-7-7-3-8211-080-000

Full-time/full-year employees will be assigned to serialized positions in independent operations in separate reporting units established for that purpose. All salaries and wages paid for temporary help and student assistants will be paid from blankets established for that purpose. The budget function and class code (Items 5.B. and 5.C on Form 607) should be 791.

New discipline codes such as Intercollegiate Athletics-7200, etc., should use unassigned reporting units as identified by the individual campus with the restriction that the reporting unit fall within the same budget function as the discipline code being used.

If an activity is contemplated for which a discipline code is not currently identified in the "Yellow Book," a written request for assignment of a discipline code should be made to this office.

B. Reimbursements

Fees collected should be deposited as General Fund Reimbursements. Budget Allotment Code 202 will be used to identify the IRA reimbursement.

C. Expenditures Through a Contract with an
Auxiliary Organization

1. The total of the contract will be recorded as Services from Other Funds or Agencies BA 005, under discipline code 4998.
2. When IRA Funds are expended through an auxiliary organization, the contract must contain the conditions and terms stipulated in BA 75-2.

DDH:ACS/mb
Attachments A & B

BA 78-13
EPR 78-17

ATTACHMENT A

INSTRUCTIONALLY RELATED ACTIVITIES

<u>Expenditures (all sources)</u>		
<u>Actual</u>	<u>Estimated</u>	<u>Proposed</u>
<u>1976/77</u>	<u>1977/78</u>	<u>1978/79</u>

Program:

Intercollegiate athletics
Radio, television, film
Music and dance performance
Drama and musical productions
Art exhibits
Publications
Forensics
Model U.N.
Agricultural Judging

TOTAL _____

SOURCE OF FUNDS

Source:

General Fund
 IRA
 Other (Supplies and Services
Associated Student Body
Program Revenue
Foundations
Private
Other (Specify)
IRA Fee

TOTAL _____

