CSUF students have a long history of assessing themselves an IRA fee that is now $36.65 per semester to support Instructionally Related Activities—more commonly referred to as IRA. This provides funding for educational experiences and activities directly related to courses offered at the University. Associated Students, CSUF, Inc. administers the IRA fee and provides support to faculty, staff, advisors, and students who participate in courses that benefit from this fee. Every year, the IRA Committee accepts funding proposals and submits a proposed budget to the University President under which IRA funds are utilized. This Committee is chaired by the ASI President or designee, and is composed of six students, six faculty/administrators, and three non-voting ex-officio members (ASI staff). The IRA Committee also meets to consider line-item transfer and any other requests.

Every year, the IRA Committee accepts funding proposals in the spring and submits a proposed budget to the University President under which IRA funds are utilized. The IRA Committee also meets in the fall to consider funding requests from contingency and any other requests.

MEETING INFORMATION

The 2017-18 Committee is composed of:

- Manminder "Sunny" Gill, Chair of the IRA Committee
- Student Voting Members
    - Saba Ansari, College of Natural Sciences and Mathematics
    - Shivani Bhaagat, College of the Arts
    - Anisha Chacko, Mihaylo College of Business and Economics
    - Vickie Chew, Mihaylo College of Business and Economics
    - Crystal Martinez, College of Humanities and Social Sciences
    - Dennis Phang, Mihaylo College of Business and Economics
- Faculty/Staff Voting Members
    - Jerry Garcia, Representative for VP of Administration and Finance
    - Morteza Rahmatian, Interim Dean, Mihaylo College of Business and Economics
    - Deanna Leone, Representative for VP of Student Affairs
    - Bob Gass, Faculty Representative, Human Communications
    - April Brannon, Faculty Representative, English
    - Katherine Bono, Child & Adolescent Studies
- Non-Voting Staff Members
    - Dave Edwards, ASI Executive Director
    - Lionel Lawrence, ASI Director of Financial Services
    - Deserita Ohtomo, ASI Finance & Budget Coordinator

IMPORTANT DOCUMENTS AND FORMS

- Check Request Form
- IRA Budget Handbook 2017-18
- IRA Budget Summary 2017-18
- IRA Budget Policy Statements, Procedures, and Guidelines
- 2018-19 Budget Development Timeline
- IRA Rubric for Evaluation and Funding Criteria

IRA BUDGET FUNDING REQUEST PROCESS

MANDATORY IRA ORIENTATION

Prior to submitting an IRA budget proposal, the faculty member responsible for the program must attend a mandatory in-person budget orientation on one of the following dates. **The in-person Budget Orientation is mandatory for both new and continuing/returning programs.**

- October 30, 2017: 9AM-12PM or 1PM-4PM
- November 3, 2017: 9AM-12PM or 1PM-4PM

You are also strongly encouraged to have your budget administrator, administrative assistant or department secretary, who assists in preparing forms and processing financial paperwork, attend the in-person orientation..

Funding Application

Once you have attended the IRA Orientation, you are eligible to request funding using the online submission form that will be emailed to you.

PLEASE REMEMBER

- Carefully read the IRA Funding Criteria Acknowledgement Form before submitting. **Any requests in violation of the Criteria will not be considered by the Committee.**

- You will need to attach a copy of the course syllabus, evidencing that the program, activity, or assignment for which you are seeking funds is a required part of a state funded course.

- Ensure that your application has been completed accurately. **Any applications not filled out completely and accurately will not be considered by the IRA Committee.**

- Proposals are due by 5:00 p.m. on Friday, February 2, 2018. **Late applications will not be accepted.**

Steps After Submitting your Budget Proposal

- Your application, if complete and accurate, will be reviewed by the IRA Committee.
- You will be notified after the budget is approved by the University regarding whether your request was approved or not.
- All award recipients will be **required** to attend the Post-Award Orientation. More information is below.

IF YOUR REQUEST WAS APPROVED, WHAT IS NEXT?

MANDATORY Post-Award Orientation

The mandatory Post-Award orientation is for faculty members to understand the administrative, financial, and risk management requirements of the IRA program. Faculty whose program or course is recommended for funding, but who fail to participate in this orientation will not receive funding. Representatives from different University departments will provide overviews with key resources and contacts that will be necessary for the successful implementation of the IRA program.

Final Report

Starting with the 2017-18 fiscal year, all programs receiving IRA funding are required to submit a Final Report 30 days after the end date of the program (as listed in the funding application). For any IRA programs that do not meet this requirement, they will not be eligible to apply for funding in the next fiscal year. The final report form will be sent to the faculty member in charge of the IRA program with instructions on how to submit and the due date.

FREQUENTLY ASKED QUESTIONS (**Hide All**)

1. What is the criteria for receiving IRA funding?
   The "Criteria for Defining a Program as an Instructionally Related Activity" can be downloaded **HERE**. When making budget decisions, in order to meet budget goals and maintain a healthy level of reserves, the IRA Committee may take into consideration a program's success in the past, utilization of funds, benefit per student, or "best use of funds".
2. What types of programs receive IRA funding?
   Only programs that meet the IRA criteria receive funding. Some of the programs that have been funded in the past include archaeological field experiences, vocal workshops with visiting guest artists, engineering projects, travel to forensics competitions, music workshops and concert productions, newscast productions, publishing a historical journal, Washington, D.C. internships, etc.
3. When will I find out if the IRA Committee has approved my funding request?
   After the Committee has met to deliberate and make funding decisions, you will be contacted by the IRA Administration as to whether or not your program is being funded and the amount of funding awarded. We anticipate this will occur during April 2018.
4. My IRA program will be traveling off campus, but within the United States. Are there specific requirements for travel?
   Any IRA funds used to support travel costs for students, faculty, or staff members must comply with all the requirements as set forth by **University Travel Operations**. See sections that apply to non-employee or employed students, faculty, or staff. These requirements must be fulfilled prior to any travel deposits, advances, or reimbursements being issued. It is critical to review all of these details well in advance of any travel plans in order to allow time to address any questions and accomplish all that is required. You are also strongly encouraged to have the budget administrator, administrative assistant or department secretary who assists in preparing forms and processing paperwork review these requirements as well.
5. My IRA program will be traveling out of the country. Are there specific requirements for foreign travel?
   The University has implemented extensive requirements concerning international travel. Foreign travel will not be allowed without the express authorization to travel from the University President. It is highly recommended that IRA program directors begin planning a minimum of four to six months prior to the planned departure date. Information for University foreign travel requirements can be found **HERE**. Evidence of compliance with these requirements must be provided prior to any advance disbursement or obligation of any funds for travel.
6. What is my responsibility as the faculty member responsible for the program/activity/assignment requesting or receiving IRA funds?
   - Review the Budget Policy Statements, Procedures and Guidelines.
     - Comply with these policies, procedures, and guidelines, as well as with University policies, procedures, and requirements, particularly in hiring, travel (domestic or foreign), and risk management.
   - Exercise good business judgment, use IRA funding conservatively, and model fiscal prudence (e.g., share rides, share rooms, encourage fundraising, etc.).
     - Carefully review the section entitled "Role of the Program Advisor/Faculty". You are also strongly encouraged to have the budget administrator, administrative assistant or department secretary who assists in preparing forms and processing paperwork review these policies, procedures, and guidelines as well.
   - Notify **irafunding@fullerton.edu** if there are any significant changes to your program, so that the committee can convene and approve if appropriate.
7. I was awarded funds to hire students in connection with my IRA program. How do I go about doing that?
   1. Student Task Profiles
      a. All student employees in a job code of 1870, 1868 or 1874 are funded the same way through the general fund. A student task profile is used to override default funding for students. The department time keeper selects the specific task profile

created during rapid time entry (student attendance) to fund the student employee through the IRA account.

   b. A task profile can be requested any time of the year, but it must be requested and setup in advance so that it is available during rapid time entry. The task profile should be requested no later than the 25th of the month for use in the month's student pay period.
   c. When a task profile is selected, funding will distribute to the exact combo code tied to the task profile selected. Task profiles are used to charge to a different department, fund, class or program code only.
2. Chartfield Request Form
   a. The first step to setting up a student task profile is to attain a chartfield class code. Complete the ChartField Request Form on the Administration and Finance webpage. Print, obtain approvals and send form to the Budget Office, CP-300.
   b. Once the chartfield class code is established, you will receive an email confirmation form from DL-Budget@fullerton.edu.
   c. The requested chartfield to use IRA funds will always be:
      i. Department: 10021
      ii. Fund: THERE
      iii. Program Code: 7997
      iv. Account: 601303
      v. Class Code: Indicate this will be used for IRA program and indicate the IRA program number (4-digit IRA program code)
3. Student Task Profile Action Form
   a. The Student Task Profile Form can be found in the Human Resources website under forms then click on Position Management. The form is available on a fillable PDF form.
   b. Once completed and signed, please scan and email to prpm@fullerton.edu.
4. Student Task Profile ID
   a. Once established, the task profile ID will be emailed to the requestor from Juanita Arreola on behalf of Position Management.
   b. Enter this code in Rapid Time Detail Information for each student along with the students' number of hours attributable to the IRA award.
5. Enter Student Task Profile ID in PeopleSoft Rapid Time.

8. How do I process check requests, purchase orders, and travel advance requests?

Check Request Procedures

1. Complete a check request form, available **here**.
2. The ASI Accounting Office processes IRA checks once a week. All check requests to be processed for payment during any given week must be submitted and date-stamped by the ASI Accounting Office by 5:00 PM on Friday of each preceding week. Checks are ready for distribution/pick-up by Friday at 3:00 PM each week. (If a holiday falls on a Friday, check requests must be submitted by Thursday at 5:00 PM for processing the following week. Processed checks will be available on Thursday at 3:00 PM when Friday is a holiday.) It is advisable to have a copy of the check request date-stamped when submitting the original check request. If check requests are dropped off without being date-stamped, the ASI Accounting Office will date-stamp them and the check requests will be processed for payment the following week.
3. When submitting check requests for payment, make certain to attach the original copy of the invoice (along with applicable packing slips) to the back of the check request. If a remittance copy of an invoice is to be included with a check, make a note of this under the "Special Instructions" section of the check request form. When requesting that a letter, memo, order form, etc., be mailed with a check, make a photocopy to remain with the check request when it is filed in the ASI Accounting Office. Supporting documentation should always be provided with check requests. Do not submit statements in place of invoices (checks cannot be written from statements).
4. Supporting documentation must be original. If a copy, fax, or internet print-out of an invoice is provided, the supporting document must be certified as an original document. If in doubt, or if the documentation appears not to be original, please attach appropriate certification(s) to avoid a delay in processing the check request. Copies of itemized

receipts are not valid and will not be reimbursed; the original itemized receipt must be submitted for reimbursement (unless the payment of the receipt is split between two funding sources, in which case a copy of the other payment must be attached to the check request). Credit card receipts not supported by an itemized receipt will not be reimbursed: the itemized receipt is the reimbursing document. Certification forms are available in the ASI Accounting Office, or online **HERE**.

5. If more than one receipt is attached as supporting documentation, the requestor should prepare an adding machine tape or a simple spreadsheet to support the amount requested. If no tape or spreadsheet is attached, the ASI Accounting Staff will request that the submitter of the check request "tape" the receipts. ASI Accounting Staff will review the check request for appropriateness (i.e. complete name, address, phone number, etc.), supporting documentation, applicable purchase orders, etc. If the check request is not complete, the ASI Accounting Staff will not date-stamp and accept the check request.

Travel Request Procedures & Reimbursement Policy

No travel advances will be issued until the requester has complied with the University travel requirements as set forth above. Copies of the travel forms referenced above must be attached to any check request or Travel Authorization Form submitted to the ASI Accounting Office.

Travel advances can only be requested prior to actual travel dates. Expenditures covered under travel advances include: airfare, ground transportation, lodging, meals, mileage, and registration fees. Detailed instructions are also available on the reverse of each hard copy form.

1. Complete the Travel Authorization–Advance Request–Expense Report form in triplicate (the form can be obtained in the ASI Accounting Office, TSU-224, x2404).
2. Submit the first and second copies to the ASI Accounting Office, and the advance will be initiated. The third copy is for the requestor's files.
3. The original will be returned to you with the advance check. The person requesting the check must pick up and sign for the check. Be sure to allow ample processing time for the check.
4. Hold the original copy until travel has been completed, at which time receipts and/or monies are to be returned to the ASI Accounting Office. Receipts and any remaining money must be returned to the ASI Accounting Office within five (5) working days after return from travel.
5. For airline travel, a copy of the passenger's airline ticket must be submitted with the Travel Authorization Form, and the passenger must provide the original boarding pass. Boarding passes (not internet print-outs) are required as evidence that travel occurred.
6. Mileage will be reimbursed at the State Rate, to and from campus. Mileage reimbursement is calculated based on distance to and from campus. Gas receipts are not required.
7. If actual travel expenses exceed the advance amount, it is not necessary to complete a check request for reimbursement; the Travel Authorization form will serve as the check request.
8. No additional advance or travel authorization will be approved if the requestor has any outstanding travel advance.
9. Submit original supporting documentation for all expenses claimed.

CONTACT US

Please contact **irafunding@fullerton.edu** if you have any additional questions. When corresponding or leaving messages, it is very important to reference your program name and program/account code. This will allow us to provide a more accurate and timely response.

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