



REPORT ON INSTRUCTIONALLY RELATED ACTIVITY (IRA) TASK FORCE

I.

EXECUTIVE SUMMARY

In this report, the IRA Task Force makes recommendations that will improve the CSUF IRA process by making it more effective, efficient, and transparent. The Task Force took special care to ensure that its recommendations align with prevailing campus, CSU, and statewide IRA policies. We also took inspiration from the best IRA practices used by other CSU campuses as well as the practices of similarly situated CSUF committees such as the University Faculty Research Committee. From this analysis we suggest, among other things, strengthening the IRA evaluation criteria by requiring that applicants demonstrate: how their projects align with the university's missions and goals, the impact on students, the level of student participation, as well as explain whether their projects incorporate instructionally proven strategies like research mentorship or other *high impact practices (HIPS)*. Further, applicants will need to fully divulge how they plan to manage IRA funds in a fiscally responsible manner.

To strengthen transparency in the application process, the Task Force has also developed a new funding rubric based on pre-selected award categories from which applicants can select from during the application process. Using a grid in the application, faculty applicants will immediately know the amount of each award in each funding category and the number of awards available per category. Additionally, having predetermined funding categories will help the IRA committee more effectively sort and organize its work. To make the IRA committee's work more efficient, the Task Force recommends that the presentation component of the current review process be discontinued and the frequency of IRA committee meetings be reduced but that the length of the meetings that do take place be increased from a few hours to day-long assessment events.

Moreover, the Task Force recommends that once awarded but before funds are disbursed, awardees attend a mandatory Post Award Process Orientation/Training Meeting so IRA recipients understand CSUF's expectations regarding the administrative, fiscal, and risk management requirements of the IRA program. A key recommendation, intended to protect the integrity of the award process, is that awardees provide a final report to the IRA committee within thirty (30) days their IRA funded program ends. The IRA committee will use this mandatory report to evaluate the awardees' management of IRA funds and assess the quality of student experience. Finally, the IRA Task Force recommends that CSUF review the suitability of the current IRA fee and consider increasing it to ensure the future financial viability of the CSUF IRA award program. It may be the case that legacy recipients (e.g. longstanding repeat awardees) need to be encouraged to find or develop alternate sources of funding other than CSUF's IRA fees.



II.

INTRODUCTION AND TASK FORCE CHARGE

The Instructionally Related Activity (IRA) Task Force was established at the end of 2015 per the recommendation of the Provost and Vice President for Academic Affairs Jose Cruz and the Vice President for Student Affairs Berenecea Johnson Eanes. The IRA Task Force was charged with substantially revising Cal State Fullerton's IRA award's process. IRA funding requests had increased dramatically during the 2016-17 academic year. The IRA Committee had \$1.622 million available to allocate but received more than \$3.4 million in proposal submissions. To address this budget shortfall, the Task Force was entrusted to comprehensively assess and revised the CSUF IRA process and make recommendations toward improving its effectiveness, efficiency and transparency.

At the beginning of the spring semester 2016, Provost and Vice President for Academic Affairs José Cruz and Vice President for Student Affairs Berenecea Johnson Eanes charged the Task Force with examining the current Instructionally Related Activity program.

Specifically, the IRA Task Force was charged to:

- A. Conduct an assessment of the CSU Fullerton IRA process;
- B. Research and review best practices from other CSU campuses;
- C. Research and review the IRA requirements established in California Education Code, CSU Board of Trustee policy, and the CSU Chancellor's Executive Orders;
- D. Analyze and seek opportunities to strengthen compliance with CSU requirements for risk management, budget oversight, and travel approval systems;
- E. Determine, to the degree possible, criteria used for the selection of projects to be funded;
- F. Determine the appropriate organizational structure of the IRA Committee; and
- G. Develop recommendations for improvements and streamlined efficiencies in IRA procedures, policies, and processes.

III.

BACKGROUND

CSUF students have a long history of enjoying a robust IRA program supported by their decision to self-assess an IRA fee that is now \$36 per semester. In 1974 the IRA program was initiated with an infusion of \$2.6 million in State funds. Funding was shifted to the campuses in the fall of 1977 through imposition of a special fee, in the amount of \$5 per semester, on students by Chancellor's Executive Order 290. In spring 1983 there was a failed referendum to increase the fee. A successful referendum in spring 1984 brought the fee to \$10 per semester. In fall 2000, after failed referenda in 1989 and 1990, a successful referendum brought the fee to \$18 and then \$26 per semester. In 2010, the most recent successful referendum brought the fee to its current \$36 per semester and provided that 36% of proceeds would automatically be awarded Athletics.



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The IRA fee provides funding for educational experiences and activities directly related to courses offered at the University. Associated Students, CSUF, Inc. (ASI) administers the IRA fee and provides support to faculty, staff, advisors, and the students who participate in courses that benefit from this fee. Awards are made by an IRA Committee, chaired by the ASI VP of Finance, acting under authority delegated by the ASI President, and comprised of six students, six faculty/administrators, and two non-voting ex-officio members (ASI staff). Every year, the IRA Committee updates its website, provides online orientation and, in the early spring, accepts funding proposals for the following academic year. Proposals are reviewed for minimum criteria, considered for funding based on said criteria, and potentially selected for a budget hearing. Presentations and deliberations take place during March and April with a goal to submit a proposed list of funded projects to the University President before the end of the academic year. Additionally, the IRA Committee considers funding requests for contingency funds from faculty in the fall semester.

The number of programs requesting IRA funding has grown substantially. In 2006, \$1.8 million was awarded to 47 programs. In 2015-16, 113 programs, including 31 new ones, were proposed for a total of \$4.5 million including 10 high impact study away or abroad programs. Revenue from the fees was projected at only \$2.8 million. The IRA Committee confronted difficult decisions in allocating fairly and consistently, honoring the long history of successful programs while giving consideration to new faculty with new proposals. In the first round of cuts proposals were eliminated when proposers missed required online orientation or deadlines or did not meet formal IRA criteria. Special consideration was given to new programs whose faculty had not previously applied for IRA funding at CSUF. There was considerable discussion regarding Miscellaneous Course Fees and their use as some proposals seemed a better fit for that type of funding.

The Committee reviewed 2014-15 enrollment and funding by college to get a sense of proportion and to guide decisions for any increases. The Committee decided to establish consistent award guidelines for student travel, a step that provided a path for logical second round reductions; the committee decided to make an across the board 5% reduction to all proposals to come close to the targeted goal. As a result the proportion of funding among colleges was relatively comparable to the past and new proposals were provided with some initial funding. Total IRA 2015-16 budget among programs was \$3,382,158 with a projected "deficit" or use of reserves of \$624,899. In addition, late in the fall 2015 an additional call for contingency requests awarded an \$116,472 from reserves and contingency primarily due to an increase in enrollment.

The recent 2016-17 call for proposals was answered by 122 programs, including 21 new proposals. The total requested is \$3,465,554. It is estimated that there is \$1.622 million available to award after allocating agreed amounts for Athletics and administration

IV.

TASK FORCE MEMBERSHIP

Voting Members:

- Dr. Robert Castro, Associate Professor of Politics, Administration & Justice – Co-chair
- Taylor Feher, ASI Board of Directors Member (College of Humanities & Social Sciences) – Co-chair
- Kayleigh Bates, ASI Board of Directors Member (College of Health & Human Development)
- John Beisner, Executive Director Risk Management, Environmental Health & Safety
- Dr. Emily Bonney, Associate Professor Liberal Studies and Academic Senate Chair
- Dr. April Brannon, Associate Professor / English Education Coordinator
- Dr. John Breskey, Assistant Professor, Department of Health Science
- Laurinda Fuller, Director of Internal Audit
- Bruce Goodrich, Department of Theatre/Dance Chair
- Annabelle Landry, ASI Chief Governmental Officer
- Rachel Lynch, Budget Manager, Student Affairs Division
- Laura Romine, ASI Vice President of Finance
- Joseph Valencia, ASI Board of Directors Member (College of the Arts)
- Steven Yim, Controller, Division of Administration & Finance

Staff Support:

- Dr. Dave Edwards, ASI Executive Director
- Jeannie Mollenauer, ASI Director, Financial Services
- Deserita Ohtomo, ASI Finance and Budget Coordinator
- Justin Lawson, ASI Special Projects Coordinator

V.

METHODOLOGY

The IRA Task Force who met on a weekly basis for a total of nine weeks from December 2015 through April 2016. At the first meeting the Task Force conducted a review of the CSUF IRA process to establish a list of discussion topics to review as a group. The Task Force chose to schedule one to two discussion topics per meeting to provide time for thoughtful discussion.

In addition to reviewing the current CSUF IRA process the members of the Task Force were each asked to research, review, and discuss best practices from other CSU campuses. The co-chairs synthesized and discussed the IRA requirements established in the California Education Code, CSU Board of Trustees policy, and Chancellor's Executive Orders. Each week the Task Force led discussions on opportunities to strengthen compliance with CSU requirements for risk management, budget oversight, and travel



approval systems. In addition, the Task Force worked to establish criteria that could be used for the selection of projects to be funded, develop the appropriate organizational structure for the IRA Committee, and formulate recommendations for improvements and efficiencies in IRA procedures, policies, and processes.

Data from the other CSU campuses was reviewed during each discussion and many of the recommendations were based on this consideration of the best practices identified at other institutions. At the conclusion of each discussion the group chose to either take action on the topic by providing a set of recommendations or not take action on the topic. The recommendations of the Task Force were then compiled and presented through the distribution of this report.

VI.

ISSUES/DISCUSSIONS

A. Changes to the Application

Background and Issue

The application criteria and questions posed to applicants were reviewed and revised with an eye toward making the application process clearer and more efficient.

Each year, the Chair of the IRA Committee reviews the funding application for updating and improvement. This year, for the first time, the application was offered online (via Wufoo), and several of the questions were revised. The Task Force thoroughly considered additional new questions, including a request for a complete description of the program/course and the provision of means for proposers to submit student testimonials, awards, evidence of prominence or any other supporting information. Additionally, applicants are now given the opportunity to include supplementary information (e.g. student testimonials) to strength their submissions.

Recommendation

The IRA Task Force recommends the inclusion of the following questions:

1. How do the mission and goals of the program/course align with the university's strategic plan to increase high-impact practices (HIPS)?
2. What is the required instructionally related activity on the part of the enrolled students?
3. How does the activity directly and indirectly impact/enrich students' educational experience?
4. How does this program strongly enhance the campus community?
5. How does this program clearly state and describe plans for assessment of learning outcomes?



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6. How do you plan to manage the administration of funds in a fiscally responsible manner?
7. Have you pursued other sources of funding?
8. Are other sources of funding being utilized?
9. What is the total cost to operate this program?
10. What amount is being contributed by the students and faculty?
11. What is the minimum amount of IRA funding required to operate the program or course (or can this program be successful with partial funding from IRA)?

The IRA Task Force also recommends the following changes to the application:

1. Require the Department Chair and Dean to review all applications to determine if they want to fund the program or course and to approve or deny an application based on their determination whether the program meets the Department's or College's strategic goals.
2. Remove the requirement to submit program description in PDF (500-1000 words)
3. Change the budget questions to a yes-no option. If the applicant answers yes, they will be prompted for nested amounts and details that will also be required.
4. Require returning faculty to agree to mentor new faculty to help navigate the IRA process.
5. Require all applications to identify as a new or returning program.
6. Require proposers/applicants for returning programs to state how many years they have received funding for their program.

B. Rubric for Evaluation and Funding Criteria

Background and Issue

Historically the resources generated by the IRA fee, which grew as a result of increases by referendum and healthy enrollment, provided adequate funding for most proposals requested. A formal ranking among programs that met minimum criteria has not been utilized for funding decisions in the past. Circumstances have changed, and the amounts requested now significantly surpass the funds available.

The IRA Task Force examined the funding criteria and principles used previously at CSUF, as well as those utilized at sister CSU campuses. Evaluation rubrics have been used at other campuses, which have allowed faculty members to understand how their proposal might be evaluated. Such rubrics can facilitate the development of stronger proposals and discourage proposals that do not meet the established IRA criteria.



Recommendation

The IRA Task Force recommends the IRA Committee use the attached rubric for evaluating requests with respect to the following topics:

1. Mission and Goals – The proposal establishes and maintains a clearly stated set of goals and objectives, expresses a clear mission for the activity, and aligns with the strategic goals of the university.
2. Student Participation – The proposal includes a high proportion of required activity on the part of enrolled students and the activity requires deep engagement from the enrolled students.
3. Student Impact – The proposal has clear direct and indirect student impact, aligns with the University strategic plan to increase high-impact practices, strongly enhances the campus community, and clearly states and describes plans for assessment of learning outcomes.
4. Financial Management (New Requests) - The proposal exhibits superior financial management, clearly states how all funds will be utilized, clearly states how other sources of funds are being utilized and/or pursued.
5. Financial Management (Returning Requests) – The post award report from the previous year shows strong fiscal prudence, responsible administration of funds and superior financial management.

Given the increased demand for funding and limited resources to adequately fund all requests, the Task Force also recommends that the IRA Committee clearly communicate to all applicants that under the present funding model full funding of their proposals is not guaranteed. Additionally, consideration should be given to fully funding high quality programs or courses in lieu of partially funding all programs. This would highlight the idea that providing full financial support to quality programs would have a greater impact on student success.

C. Committee Structure and Meetings

Background and Issue

The IRA Committee is chaired by the ASI Vice President of Finance, and comprises six students, six faculty/administrators, and three non-voting ex-officio members (ASI staff).

Because of the amount of work and inherent challenges facing the IRA Committee the past few years, the IRA Committee has historically met for several hours on several Fridays in the fall and spring. Recruiting faculty and students to volunteer several Fridays to serve on the IRA Committee has become challenging.

Recommendation

The IRA Task Force has reviewed the current committee structure and recommends the following:

1. The current membership of the committee will remain at six (6) students and six (6) faculty/administrators for a total of twelve (12) members.
2. The following administrators or their designee will serve on the committee: Vice President for Student Affairs, Vice President of Administration and Finance, and a Dean appointed by the Provost and Vice President of Academic Affairs.
3. Faculty and administrators should serve two-year terms to create continuity from year to year.
4. Academic Senate will recommend faculty members to be appointed by the University President.
5. The ASI President will appoint the student members.
6. No proxy representation will be allowed.
7. Faculty who have submitted proposals during a given cycle are not eligible to serve on the committee.
8. The budget hearings/presentations will be eliminated and proposals evaluated purely on the written application.
9. The IRA Committee should follow the example of other CSU campuses and conduct 1 or 2 day-long Friday IRA meetings each semester. The elimination of the presentations would reduce the need for meetings, and the more structured application and evaluation process would enable the IRA Committee to recruit more successfully and be more efficient.

D. Final Reporting

Background and Issue

In the past, the IRA Committee would evaluate returning/legacy programs or courses by only examining if the allocated funds were managed in a financially responsible manner. The Task Force agreed that this method alone was limited and lacked a substantive qualitative review or assessment of the instructionally related student experience at its conclusion.

Recommendation

The IRA Task Force recommends a final report be submitted within thirty (30) days of the end date of the funded program. This report will be mandatory for all recipients of IRA funds and failure to submit a final report will disqualify the applicant from submitting an application for funding in the next calendar year. The IRA Committee will use this final report to assess the administration of funds, evaluate the financial management of the funded request and provide some perspective on the quality of the student experience.



In addition to ensuring the evaluation aligns with the aforementioned rubric criteria, the IRA Task Force recommends the inclusion of the following questions in the guidelines for final reporting:

1. Did the program establish and maintain a clearly stated set of goals and objectives that align with the strategic goals of the university?
2. Did the program establish and maintain student activity and engagement consistent with the requirements of the syllabus?
3. Did the program establish and maintain a high proportion of required activity on the part of the enrolled students?
4. Did the program establish and maintain clear direct and/or indirect student impact that aligns with the university's strategic plan to increase high-impact practices?
5. Did the program strongly enhance the campus community?
6. Did the program conduct effective student assessment and learning outcomes?
7. Did the program maintain superior financial management techniques, specifically managing the funds as intended in the proposal?

E. Post Award Process Orientation/Training Meeting

Background and Issue

At some point in the past, in-person training for effective administration of IRA program awards was replaced by online website and published information. This included a comprehensive list of FAQs with embedded documents and links to University resources. Budget policies and guidelines have been provided in the annual publication of the IRA budget handbook. However, this training often seemed to be inadequate or at a minimum was not effective given the faculty member's focus on the application rather than the administrative requirements which would become important after receiving funds. So to help faculty members understand the administrative, financial, and risk management requirements of the IRA program, the Task Force discussed the concept of a post award/pre-utilization orientation and training.

Recommendation

The IRA Task Force recommends implementing a mandatory post award/pre-utilization orientation and training meeting for all funding recipients. Faculty whose program or course is recommended for funding, but who fail to participate in this Post Award Orientation and Training will not receive funding. Representatives from University departments (Contracts and Procurement, Travel Operations, Risk Management, HRDI, ASI) should provide overviews with key resources and contacts. This meeting would serve as an opportunity to train faculty and budget administrators on how to handle post award administration of programs and courses. Multiple meetings could be scheduled to provide more flexibility for required faculty and budget administrators.

F. Post Award Administration Issues

Background and Issue

Currently more than 100 professors and department budget managers coordinate and administer various IRA programs and courses. The necessary post award support for these programs and courses is significant. For example, each year more than 4,000 students travel internationally and domestically as part of IRA. In just one month, more than 1200 checks or purchase orders are processed for IRA-related expenses. This year that volume is expected to increase by 15%.

For years, ASI has been responsible for and developed staff to provide administrative and accounting support for the IRA program, including the IRA Committee. ASI also provides coordination efforts between the IRA faculty and various administrative departments at CSUF. The need for this support continues to grow as the IRA program and faculty needs increase. There has often been confusion as to ASI's role in supporting the IRA program, some applicants/participants believing that ASI is responsible for IRA program and course activities including approving travel, employment, and contracts. Some faculty/staff members and students even believe the IRA fee is an ASI fee and program.

Post award administration of the IRA fee has the following goals:

- a. Safeguard the proper use of IRA fee;
- b. Ensure the best use of student fees with good judgment and fiscal prudence;
- c. Ensure that original intent of proposal approved by the IRA Committee is upheld;
- d. Coordinate the instructionally related program within the approved budget; and
- e. In coordination with appropriate University departments, ensure compliance with all University policies, procedures, guidelines and requirements (travel, risk management, human resources, contracts and purchases).

Recommendation

The Task Force examined several issues which fall under the heading of Post Award Administration. All of these have great impact on the success of the IRA program, specifically travel, contracts and procurement, student employment, revenue and cash handling, etc. These issues and corresponding recommendations are shared in the following sections. Additionally, a cost assessment should be conducted to ensure that ASI is being compensated for the support it is providing to IRA, and that ASI is providing sufficient support to the IRA program.

1. Travel, International and Domestic

Background and Issue

More and more IRA awards are focused on the high impact practices of study or research away or abroad. IRA program advisors and those who assist them need a clear streamlined way to ensure safe travel in compliance with all University requirements. There is often confusion as to whether the same requirements and University policies apply to travel funded through IRA funds. Last minute requests for travel are one of the most challenging administrative problems confronting post award administration. Sometimes faculty submit requests for travel a few days before the trip and/or never receive prior authorization for travel. There is also confusion as to how IRA travel is defined (i.e., business related vs. non-business related). This has caused concerns about risk management and appropriate use of IRA funds.

Recommendation

All travel, regardless of funding source (including IRA), should follow University policies, procedures and guidelines, including prior approval by the College-delegated authority. University travel requirements, policies and procedures should be thoroughly reviewed and clarified with faculty and appropriate department personnel as part of the Post Award Orientation Training. Tools (e.g., a travel checklist) should be provided to the travelers and department personnel to assist in their understanding of University requirements and ensure timely and proper travel authorization.

2. Contracts and Procurement

Background and Issue

There has been confusion as to which entity (ASI or the university) should enter into a contract for IRA related activities and services. Some faculty have even entered into contracts on their own, independent of the university. While the funding is processed through ASI, the activity is a University activity. The printed IRA guidelines have clarified that any contract or service agreement must be processed directly with University Contracts and Procurement. This does require the use of the University CFS system for requisition and purchase order. Detailed administrative processes are in place to provide for systematic authorization, processing and recharging to the proper IRA program.

Recommendation

It is recommended that the issue of contracts and procurement processes be included the post award orientation and training to familiarize any IRA program or course recipients with these requirements, references and key contacts.



3. Student Employment

Background and Issue

Several IRA funding programs and courses include the employment of students. For student employment tracking purposes, a human resources special task profile is assigned to each IRA program awarded funds.

Recommendation

To ensure that IRA programs and courses with student employees follow proper procedures, the Task Force recommends this topic be included in the comprehensive post award funding orientation and training.

4. Revenue and Cash Handling

Background and Issue

While most IRA funded programs and courses simply rely on the funds provided by the IRA Committee, some others generate revenue from the events associated with their IRA-funded program or course. These could include ticket sales for theater or music performances or payments from participants in the program and course.

Additionally, IRA programs and courses planning major trips coordinate complex travel plans and itineraries, lodging, transportation and meal expenses on behalf of large numbers of faculty, staff, and students. Many participants may pay a portion of the travel expenses and provide this payment in the form of cash or check to the faculty member managing the IRA program or course. There have been concerns that proper cash handling procedures in these situations have not been followed. Careful tracking and reporting to safeguard the proper use of IRA student fees is required.

Recommendation

The Task Force recommends the following:

- a. Revenue generated from any IRA funded program or course should be deposited with the State or returned to the IRA fund.
- b. To eliminate cash handling concerns, all IRA programs or courses that anticipate receiving payments from participants, such as travel expenses, should contact the University Controller's office to set up a process so participant payments can be made directly to



University Cashiering. All cash and checks from IRA participants must be deposited with University Cashiering.

- c. Revenue and cash handling should be reviewed and clarified with faculty and appropriate department personnel as part of the Post Award Orientation Training.
- d. Any revenue generated by the program be managed through University Controller's Office. This is consistent with recent auditor finding and University Controller recommendations.
- e. All funding must be utilized in the year it has been requested. All funds not utilized in the requested year will be forfeited and must be returned back to the IRA fund.

5. General Compliance and Oversight

Background and Issue

There have been IRA programs that utilized philanthropic sources of funds in order to pay for expenses associated with an IRA funded program or course and later requested reimbursement via awarded IRA funds. Additionally, some IRA programs utilize other campus auxiliaries (e.g., ASC) to handle the accounting of these funds, primarily because the academic program already has established accounts in those auxiliaries. This use of alternative funds and subsequent request for reimbursement from IRA, as well as the use of other auxiliary accounting departments, has caused concerns regarding how well these programs or courses are following established policies on procurement, contracts, risk management, etc. Additionally, because ASI, acting as the IRA administrative support, is not engaged until after the program and course are completed, there is no opportunity to guarantee that funds are being used as they were intended by the IRA Committee.

Recommendation

Regardless of the sources of funds, the IRA-funded program or course must follow University and IRA administration and compliance policies, including procurement, accounting, approval, risk management, etc. All administration of funds for IRA-funded programs and courses must be managed by the department designated by the service agreement with the University.

G. Student and Faculty Travel

Background and Issue

Due in part to the strategic emphasis on high impact practices, travel proposals constitute a significant portion of funding applications each year. This year, travel totals 54.7% of the total amount of requested funding. In an effort to mitigate the increase in requests for IRA funding, the



IRA Committee placed limits on travel allotment per student in each IRA-funded program or course. Unfortunately, this action caused undue financial hardship for several travel-reliant, IRA funded programs or courses. In addition, CSUF IRA-funded programs and courses have historically provided funding for travel for students and faculty. Some CSU campuses do not provide IRA funding for international travel; others do not fund faculty travel. Funding for faculty travel is provided from other sources including departmental operating budgets.

Recommendation

The Task Force recommends limiting student and faculty travel expenditures to a maximum of \$500 for in-state travel, \$750 for out-of-state travel, and \$1,500 for international travel.

Additionally, it is recommended that the University students and faculty, at a minimum, cover 50% of the total costs of travel when participating in the IRA program or course in order both to offset expenses, as well as ensure student and faculty investment in the activity.

H. Revisit Amount of the IRA Fee

Background and Issue

The past two years have seen a significant (i.e., more than 50%) increase in requests for IRA funding ranging from \$600,000 to \$1,800,000 in additional proposals. While many of the recommendations in this report will make the IRA program more efficient, the demand on the IRA fund will continue to grow as more faculty develop cutting edge courses and use high impact practices. Beginning in 2017, the IRA fee will be adjusted for inflation based on the HEPI (Higher Ed Price Index). This adjustment should increase the IRA fee somewhere between 2 to 3%, creating a modest \$84,000 in additional revenue.

If the University wishes to continue to fund IRA programs as CSUF historically has, the level of the IRA fee should be examined. Other options could include identifying alternate sources of funding or reconsidering which types of programs the IRA fund should support. Failure to address this important issue will result in persistence of the frustrations proposers experience with the IRA program.



The following table outlines the current level of IRA fees throughout the CSU.

IRA Fees in the CSU
(listed highest to lowest annual fee)

Campus	Number of Students	Annual Fee
Humboldt	8,485	\$674
Sacramento	29,349	\$360
San Diego	33,483	\$360
San Jose	32,713	\$303 ¹
Sonoma	9,290	\$301
Stanislaus	9,045	\$301
San Luis Obispo	20,186	\$300
Chico	17,287	\$278
Fresno	23,179	\$264
Channel Islands	5,879	\$260
San Francisco	29,465	\$236
Bakersfield ²	8,720	\$160
San Bernardino	18,952	\$150
Maritime Academy	1,047	\$130
Los Angeles	24,488	\$123
San Marcos	12,154	\$80
Fullerton	38,128	\$72
Monterey Bay	6,631	\$60
Long Beach	36,809	\$50
Pomona	23,966	\$48
Northridge	40,131	\$30
East Bay	14,823	\$19
Dominguez Hills	14,687	\$10

1. San Jose’s IRA Fee is part of their Student Success, Excellence & Technology Fee (SSETF)
2. Median Fee

Average \$199

Recommendation

As the long-term financial viability of the IRA program is challenged given the University’s focus on high impact practices and the level of its IRA fee when compared to other CSU campuses, the University should consider whether the current IRA Fee meets the demands of this growing program.



I. Distributed Funding Model

Background and Issue

One challenge the IRA committee faces is the subjectivity of the requested amounts. The current funding process allows for requests of any amount which has made it difficult for the IRA committee to evaluate the relative merits of competing requests, a particular problem when budget constrains compelled the IRA committee to prioritize funding. .

Recommendation

In lieu of the current funding model, the IRA Task Force recommends the creation of a distributed funding request system. Applicants for IRA funding would make a request for one of a predetermined number of funding categories at a set values (i.e. \$8,000, \$12,000, \$20,000, 25,000, \$50,000, \$60,000, \$80,000, and \$120,000). Based on the current year revenues the IRA committee would announce a set number of awards available per year in each of the categories. The values of these categories as presented here were selected based on the historical distribution of previous funding requests in the past.

For example, if the current revenues, after deducting administrative fees and the dedicated funding for athletics, totaled \$1,622,773, the IRA committee would provide eight awards at \$8,000, eight awards at \$12,000, eight awards at \$20,000, eight awards at \$25,000, nine awards at \$50,000, four awards at \$60,000, two awards at \$80,000, and two awards at \$120,000 (see table below). In the table, using the revenues and applications from this past cycle, the number of awards in each category has been capped at 40 percent of the total which will allow for full funding of a total of 49 of the 121 total programs. The awards are capped at 40 percent as the 2016-17 revenue is only able to fund 40 percent of the total requests.

Grant Categories	Number of Awards	Total Cost per Category
\$8,000.00	8	\$64,000.00
\$12,000.00	8	\$96,000.00
\$20,000.00	8	\$160,000.00
\$25,000.00	8	\$200,000.00
\$50,000.00	9	\$450,000.00
\$60,000.00	4	\$240,000.00
\$80,000.00	2	\$160,000.00
\$120,000.00	2	\$240,000.00
Totals	49	\$1,610,000.00

* Under the current funding model, 9 programs were fully funded in 2016-17. Under this proposed distributed funding model, 49 programs would be fully funded.



2016-17 Requests (Minus Athletics and Admin)	\$3,465,254.00
2016-17 Available Funds (Minus Athletics and Admin)	\$1,622,773.00

J. Topics that Need Continued Discussion

The following 2 topics were discussed by the Task Force, but warrant further consideration. The Task Force is making no recommendations on these topics.

Existing Versus New Programs

An important principle for the IRA Committee in making funding awards has been encouraging faculty members to submit requests for new IRA proposals to expand the experiences students have in and out of the classroom. At the same time the committee has wanted to continue to support successful programs with repeated awards. As a consequence some recipients appear to have come to rely on annual infusions of funds from the IRA pool of money as became dramatically clear in the 2015-16 cycle when a reduction in the amount awarded to Forensics plunged that program into a crisis. While supporting successful programs is an admirable goal, as has been noted elsewhere in the report, the total amount available is not elastic. Leaving aside the growing problem of whether to provide the partial funding for many or full funding for a few, there is a real concern that soon the IRA program will have committed all its funding to ongoing support of so-called legacy programs and be unable to support new projects.

Defining Instructionally Related Activities

The Task Force discussed at length what types of programs and courses should warrant being defined as instructionally related activities. The original Ed Code was vague on its definition. However, historically, the IRA Committee has more specifically defined these activities as participatory. This creates challenges for some academic departments which have instructional pedagogy that is less participatory than other academic departments (e.g., PoliSci versus Theatre). More clearly defining instructionally related activities may increase the number of proposals from colleges who historically may not have received IRA funding.



VII.

SUMMARY

The IRA Task Force was created to provide recommendations on the policy and procedures of the IRA Committee which is currently faced with a substantial increase in proposals received for 2016-17. During this calendar year the program has \$1.622 million available to allocate, but has received proposals totaling more than \$3.4 million. The IRA Committee expects this trend to continue. The recommendations provided in this report were crafted after an assessment of the CSUF IRA process and best practice research of the other CSU campuses in addition to a review of the California Education Code, the CSU Board of Trustees policy, and the Chancellor's Executive Order. The topics discussed included recommendations for changes to the application process, the creation of a rubric for evaluation, and an analysis of the committee structure. The Task Force also discussed and made recommendations on final reporting, the post award administration process, issues around student and faculty travel, the hiring of student employees, and miscellaneous oversight and administration issues.

A number of issues were discussed but not acted upon including the creation of an alternative funding source for legacy programs, distribution of funds proportionally by college, the eligibility of funding for speaker honorariums, and changes to the length and frequency of meeting times for the IRA Committee meetings. The Task Force also chose not to provide a recommendation on discussions around the creation of a mentorship program for new funding applicants, defining what qualifies as an experiential activity, , and the prioritization of new versus returning requests. This report will be distributed to the IRA Committee for review and implementation of the recommendations provided.



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VIII

APPENDICES

- Rubric
- Proposed Changes to Criteria
- Regulatory Framework