April 29, 2016

Dr. José L. Cruz, Provost and Vice President of Academic Affairs, and
Dr. Berenecea Johnson Eanes, Vice President for Student Affairs

Dear Dr. Cruz and Dr. Eanes:

On behalf of the Instructionally Related Activity (IRA) Task Force, we respectfully submit the final report related to our review of the IRA Program. The IRA Task Force, composed of a number of faculty members, students, and staff, has met over the past several months in an effort to address the charge provided to us by the two of you at the end of last year. The group worked diligently, with candor and respect for different points of view. The members were thorough and thoughtful.

The Task Force has provided in the attached report background information on the issues surrounding the IRA program, as well as recommendations for improvement. This report, the main conclusions of which can be found in the Executive Summary, has been approved by the entire Task Force and is submitted for your consideration.

As the Co-Chairs of the IRA Task Force, we would like to thank the members of the Task Force for their dedication, thoughtful work, and tireless research, writing, and editing. We were impressed with the amount of time the Task Force members spent prior to each meeting, reviewing the materials carefully, clearly giving a great deal of thought about the charge, and engaging in the type of quality interaction that resulted in the accompanying document. It truly was a collaborative and collegial experience. We would also like to acknowledge the ASI staff members who provided exceptional administrative assistance, Finance and Budget Coordinator Deserita Ohtomo, Director of Financial Services Jeannie Mollenauer and Special Projects Coordinator Justin Lawson.

If you have any questions regarding this report, please do not hesitate to contact us. Thanks again for this opportunity to serve.

Sincerely,

Dr. Robert Castro
Task Force Co-Chair
Associate Professor of Politics, Administration & Justice

Taylor Feher
Task Force Co-Chair
ASI Board of Directors Member (College of Health & Human Development)
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 substantial 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.
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?
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*)

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<thead>
<tr>
<th>Campus</th>
<th>Number of Students</th>
<th>Annual Fee</th>
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</thead>
<tbody>
<tr>
<td>Humboldt</td>
<td>8,485</td>
<td>$674</td>
</tr>
<tr>
<td>Sacramento</td>
<td>29,349</td>
<td>$360</td>
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<tr>
<td>San Diego</td>
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<td>San Jose</td>
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<td>$303(^1)</td>
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<td>$301</td>
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<td>Stanislaus</td>
<td>9,045</td>
<td>$301</td>
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<td>San Luis Obispo</td>
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<td>$300</td>
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<td>Chico</td>
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<td>Bakersfield(^2)</td>
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<td>Dominguez Hills</td>
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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 constraints 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.

<table>
<thead>
<tr>
<th>Grant Categories</th>
<th>Number of Awards</th>
<th>Total Cost per Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>$8,000.00</td>
<td>8</td>
<td>$64,000.00</td>
</tr>
<tr>
<td>$12,000.00</td>
<td>8</td>
<td>$96,000.00</td>
</tr>
<tr>
<td>$20,000.00</td>
<td>8</td>
<td>$160,000.00</td>
</tr>
<tr>
<td>$25,000.00</td>
<td>8</td>
<td>$200,000.00</td>
</tr>
<tr>
<td>$50,000.00</td>
<td>9</td>
<td>$450,000.00</td>
</tr>
<tr>
<td>$60,000.00</td>
<td>4</td>
<td>$240,000.00</td>
</tr>
<tr>
<td>$80,000.00</td>
<td>2</td>
<td>$160,000.00</td>
</tr>
<tr>
<td>$120,000.00</td>
<td>2</td>
<td>$240,000.00</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>49</strong></td>
<td><strong>$1,610,000.00</strong></td>
</tr>
</tbody>
</table>

* 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.
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 dis used 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.
VIII

APPENDICES

- Rubric
- Proposed Changes to Criteria
- Regulatory Framework
# INSTRUCTIONALLY RELATED ACTIVITIES (IRA) EVALUATION RUBRIC

**ASSOCIATED STUDENTS, CALIFORNIA STATE UNIVERSITY FULLERTON, INC.**

**MINIMUM CRITERIA:**
- Required for academic credit
- Course offered in Summer, Fall, Spring, or Intersession
- Active Student Participation
- Does not qualify for/include grants in aid, athletics guarantees, film rentals, faculty salaries, recruitment, or equipment purchases

## TOTAL /40 POINTS

<table>
<thead>
<tr>
<th>SUPERIOR</th>
<th>PROFICIENT</th>
<th>SATISFACTORY</th>
<th>LIMITED OR UNSATISFACTORY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establishes and maintains a clearly stated set of goals and objectives, expresses a clear mission of the activity, aligns with the strategic goals of the university (9-10)</td>
<td>Establishes a set of goals and objectives, expresses a generally clear mission of the activity, aligns with the strategic goals of the university (7-8)</td>
<td>Establishes a set of goals and objectives, expresses parts a larger mission, aligns with the strategic goals of the university (5-6)</td>
<td>Does not establish a clear set of goals and objectives, does not clearly express a mission, does not align with the strategic goals of the university (0-4)</td>
</tr>
</tbody>
</table>

## MISSION AND GOALS /10 POINTS

| Request includes a high proportion of required activity on the part of enrolled students, activity requires deep engagement from the enrolled student (9-10) | Request includes a proportion of required activity on the part of enrolled students, activity requires medium engagement from the enrolled student (7-8) | Request includes little required activity on the part of enrolled students, activity requires engagement from the enrolled student (5-6) | Request includes little or no required activity on the part of enrolled students, activity requires little or no student engagement (Does not qualify for funding) (0-4) |

## STUDENT PARTICIPATION /10 POINTS

| Clear direct and indirect student impact, aligns with university strategic plan to increase high-impact practices, strongly enhances the campus community, clearly states and describes plan for assessment of learning outcomes (9-10) | Some direct and indirect student impact, aligns with university strategic plan to increase high-impact practices, enhances the campus community, states and describes plan for assessment of learning outcomes (7-8) | Little direct and indirect student impact, aligns with university strategic plan to increase high-impact practices, enhances the campus community, states and describes plan for assessment of learning outcomes (5-6) | No direct and indirect student impact, does not align with university strategic plan to increase high-impact practices, does not enhance the campus community, does not state plan for assessment of learning outcomes (0-4) |

## STUDENT IMPACT /10 POINTS

| Exhibits superior financial management, clearly stated how all funds will be utilized, other sources of funding are being utilized and/or sought out (9-10) | Exhibits proficient financial management, clearly stated how nearly all funds will be utilized, other sources of funding are being utilized and/or sought out (7-8) | Exhibits satisfactory financial management, stated how most funds will be utilized, other sources of funding are being utilized and/or sought out (5-6) | Exhibits unsatisfactory financial management, does not state how funds will be utilized, other sources of funding are not being utilized and/or not being sought out (0-4) |

## FINANCIAL MANAGEMENT (New Requests Only) /10 POINTS

| Post award report shows strong fiscal prudence, responsible administration of funds, superior financial management (9-10) | Post award report shows fiscal prudence, responsible administration of funds, proficient financial management (7-8) | Post award report shows fiscal prudence, responsible administration of funds, and satisfactory financial management (5-6) | Post award report does not show fiscal prudence, irresponsible administration of funds, unsatisfactory financial management (0-4) |

## FINANCIAL MANAGEMENT (Returning Requests Only) /10 POINTS
General Criteria Used for Approving All IRA Programs

1. The program shall be a required part of a class for which residential academic credit can be applied towards an undergraduate or graduate degree. The program must be closely related to and/or in support of the classroom study of students.

2. The program must be offered in the Fall, Spring, or Summer terms. Courses must have received final University approval.

3. The program should normally include a high proportion of required participatory activity on the part of enrolled students. By definition, a class which instructs through planned and supervised activities would be eligible, but a class which instructs through lectures, seminars, and individual projects would not be eligible as IRA programs are intended to be experiential, active student participation is required for funding. For example, travel to conferences, exhibitions, concerts, or meetings is fundable only when students are presenting, performing, competing, or otherwise actively engaged.

4. The program must provide information requested about other funding sources available to the program.

5. IRA funds may be used to support domestic and international travel when travel is essential to the central purpose of the proposed program/activity, and student participation is a requirement of the class.

6. IRA funds may not be used for grants-in-aid, athletic guarantees, film rentals, faculty salaries, or recruitment efforts/activities. However, IRA funds may be used to support recruitment activities within the University’s Intercollegiate Athletic Program. With the exception of the Intercollegiate Athletic Program, IRA funds may not be used for equipment purchases. Examples include but are not limited to: GPS, musical instruments, computers (PCs and laptops), oscilloscopes, printers, fax machines, file cabinets, general office equipment, tents, camp stoves, canteens, shelving, sound proofing, compasses, etc.
Regulatory Framework – Instructionally Related Activity (IRA) Fees

In my abbreviated rendition of the regulatory framework, I have remained as faithful as I could to the original language—preserving the substance and spirit of the IRA fee procedural guidelines. In thinking about the depth, scope, and substance of what we fund as well as how we fund—I would urge you to pay particular attention to the written IRA definitions AND IRA activity examples provided—I think the language lays out a clear regulatory “center-of-gravity” for us as we revise our own program but it also leaves (nicely) significant discretion at the campus level. RC

______________________________________________________________________________

5 CCR § 41800.2 Instructionally Related Activity Fee – state policy authorizing the CSU Chancellor to adopt rules and regulations to facilitate IRA fee program system-wide.

CSU Executive Order 290 Coversheet, IRA Fees (dated March 28, 1978) – Details that CSU Executive Order 290 establishes the procedures for the administration of the IRA fee. It also notes that IRA fees may not be used to support grants-in-aid and that campus presidents are responsible for implementing and archiving executive orders.

CSU Executive Order 290, IRA Fees (dated March 28, 1978) – This order lays out rules governing the CSU IRA fee.
1. CSU Chancellor will set up IRA fee for each campus on the request of campus president.
2. IRA fee will be assessed from all regularly enrolled students and waived where student services fees are waived.
3. All IRA fees collected by a campus will be for the exclusive use of that campus and to be used only to support IRA activities (defined by CA Ed. Code 89230 and system-wide policy).
4. IRA fee income shall not be used for tuition matters or to support faculty positions.
5. CSU Chancellor will set the IRA fee upon recommendation by a campus president.
6. Each campus shall form an IRA advisory committee to advise the president on IRA fee level and IRA revenue allocation. The IRA committee composition will consist of an equal number of faculty, students, and administrators. The administrators and faculty will be appointed by the campus president and the student members will be appointed by the Assoc. Student’s president. One of the student representatives shall serve as chair.
7. A student referendum must be called by the advisory committee should the campus want to increase the IRA fee but a fee increase referendum can take place no more than once every three years.
8. Assoc. Students may, at their discretion, support IRA related projects.
9. Extramural athletic insurance costs will be paid out of the IRA campus fee.
10. The CSU Chancellor, on recommendation of the campus president, may reduce the IRA fee if a major change warrants.
CSU Administrative Procedures for IRA (dated March 28, 1978)
I. IRA fee definition: the IRA fee is to provide support for essential educational experiences and activities that aid and supplement the fundamental educational mission of the institution.
   IRA fee objective: to ensure a stable and adequate funding for instructionally related activities.

II. IRA definition: activities and laboratory experiences which are at least partially sponsored by an academic discipline or department. Activities essential to a quality educational program and an important instructional experience. IRA activities include but are not limited to:
   A. Intercollegiate athletics (e.g. equipment, supplies, travel not covered by the state)
   B. Radio, TV, Film (film purchase, rental not covered)
   C. Music and Dance Performance (e.g. recitals, performances)
   D. Drama and Musical Productions (basic support – theatrical, operatic)
   E. Art Exhibits
   F. Publications (entertainment or informational [except journalism] not included)
   G. Forensics (debate, public speaking)
   H. Other Activities consistent with the purposes above.
      (1) Model UN
      (2) Agricultural judging

IRA program additions must include an explanation of how a proposed program falls within the IRA definition and why it is important that the program be included.

CSU Executive Order 429 Cover Sheet, IRA Fees (dated December 30, 1983) – provides notice that Executive Order 429 supersedes Executive Order 290.

CSU Executive Order 429 IRA Fees (dated December 30, 1983) –
5. Removed $10 IRA fee designation.
   Added language requiring each campus to develop and promulgate explicit procedures for evaluating and documenting the eligibility of activities for IRA funding that are consistent with the IRA definition and distinct from procedures determining the level of funding for eligible activities.

CSU Executive Order 1059 Cover Sheet, Utilization of Campus Auxiliary Organizations (dated June 06, 2011) – states that Executive Order 1059 establishes CSU policy for the appropriate utilization of campus auxiliary organizations.
CSU Executive Order 1059 Utilization of Campus Auxiliary Organizations (dated June 06, 2011)

III. Administration of Funds – campus auxiliary organizations may accept or administer campus funds as an agent of the university EXCEPT
(D) (2) “Revenues from campus mandatory fees which include student fees established for a campus and that must be paid to enroll or attend the university.”

Rob Castro
CSUF IRA Committee, Working Chair
Spring 2016
§ 41800.2. Instructionally Related Activities Fee.
5 CA ADC § 41800.2
BARCLAYS OFFICIAL CALIFORNIA CODE OF REGULATIONS

The Chancellor is authorized to establish and adjust an Instructionally Related Activities fee which shall be assessed of all regular students of the California State University. The Chancellor shall adopt such rules and procedures as may be necessary or appropriate to administer the authorization granted herein. The revenues derived from the Instructionally Related Activities fee shall be used for the support of instructionally related activities in the California State University subject to such rules and procedures as the Chancellor shall prescribe.


HISTORY

1. New section filed 2-10-78; effective thirtieth day thereafter (Register 78, No. 6).
2. Amendment filed 9-20-82; effective thirtieth day thereafter (Register 82, No. 39).

This database is current through 1/22/16 Register 2016, No. 4
5 CCR § 41800.2, 5 CA ADC § 41800.2

END OF DOCUMENT
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...
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 repository and index for all executive orders.

Attachments
Executive Order No. 290

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
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
Date: March 28, 1978

To: Presidents

From: A. C. Griffiths
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.

Distribution: Academic Vice Presidents
Administrative Vice Presidents
Deans of Students
Business Managers
Chairs of Senates
Associated Students Presidents
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 experiences 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 explana-
tion 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 infor-
mation 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
INSTRUCTIONALLY RELATED ACTIVITIES

Expenditures (all sources)
Actual  Estimated  Proposed  

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
Proposed Expenditures from the Instructionally Related Activities Fee

Program:

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

Total

Expenditures
Proposed
1978/79
Date: December 30, 1983
To: Presidents
From: W. Ann Reynolds
Chancellor
Subject: Instructionally Related Activities Fee – Executive Order No. 429

I am transmitting to you five copies of Executive Order No. 429 which revises Executive Order No. 290. Executive Order No. 290 implemented action taken by the Board of Trustees at the January 25, 1978 meeting. (See RFIN 1-78-1, part of which is codified in Section 41800.2 of Title 5.) Also enclosed is coded memorandum EP&R 83-58, which with BA 82-38 sets forth the procedures for administration of the fee and hence replaces BA 78-13/EP&R 78-15. Please note that this coded memorandum requires filing of campus procedures by March 1, 1984.

Executive Order 290 required that its provisions and implementing procedures be reviewed by the Chancellor no later than fall 1981, and a report thereon be provided to the Board of Trustees. A committee, which included faculty, student, and administrative representation, was appointed to perform the review.

The committee submitted its report in November 1981, and the report was sent to the Trustees. That review centered on administrative and procedural concerns. A second review phase, also conducted by a broadly representative committee, addressed programmatic issues. The revisions embodied in the attached documents reflect the committee recommendations and remove provisions applicable only to years preceding 1981. The only substantive revision in the Executive Order occurs in paragraph number 7.

As before, funds generated by this fee or from the General Fund appropriation may not be used for any kind of grants-in-aid

Fiscal procedures associated with the IRA fee are described in BA 82-38.
Please address questions concerning this Executive Order or the accompanying coded memorandum to the Chancellor with copies to the Assistant Vice Chancellor, Budget Planning and Administration, and the Assistant Vice Chancellor, Educational Programs and Resources. The campus President is responsible for implementing executive orders where applicable and for maintaining the campus repository and index for all executive orders.

WAR:md

Attachments
Executive Order No. 429

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

Executive Order No.: 429
Title: Instructionally Related Activities Fee
Effective Date: December 30, 1983
Supersedes: Executive Order No. 290

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.

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.

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, a student referendum, called by the advisory committee, shall be held. The referendum shall be advisory to the committee and the campus President. It shall apply to the next budget cycle. An advisory initiative, on the ballot of a duly conducted student election, that addresses a change in the IRA fee level shall be regarded as meeting the requirement for a student referendum.

8. The Associated Students are not 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 considered 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 memorandum.

W. Ann Reynolds, Chancellor

Date: December 30, 1983
Date: December 30, 1983

To: Presidents

From: William E. Vandament
Acting Provost and Vice Chancellor for Academic Affairs

Subject: Administrative Procedures: Instructionally Related Activities Fee

These procedures are issued in accordance with E.O. 429.

I. Objectives

The Instructionally Related Activities Fee was 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 were:

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.

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

*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.
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 by the campus President. Already identified and approved systemwide are:

   (1) Model United Nations activities;

   (2) Agricultural judging.

Each campus shall develop and promulgate explicit procedures for evaluating and documenting the eligibility of activities for IRA fee funding. The procedures shall be consistent with the definition of an IRA and distinct from procedures for determining the level of funding of eligible activities. A copy of the campus procedures for determining eligibility shall be filed with the Assistant Vice Chancellor, Educational Programs and Resources.

III. Fiscal Procedures

Applicable fiscal procedures are described in BA 82-38.

IV. Change in Level of Fee

A request to the Chancellor by the campus President to raise or lower the level of the IRA fee shall be
accompanied by the following information:

A. Budget information in the form given in the attachment. "Proposed" columns shall be included for each year for which a fee change is recommended.

B. Brief statement of the reasons for augmenting or reducing the fee.

C. Report of the campus IRA Fee Advisory Committee recommendation.

D. Information about the advisory referendum (required if the request is to raise the fee level to an amount greater than $10 per academic year):

1. Date(s) held
2. Text of the referendum
3. Number of students eligible to vote
4. Number of students voting
5. Number of voters approving the fee change
6. Number of voters opposing the fee change.
## INSTRUCTIONALLY RELATED ACTIVITIES

<table>
<thead>
<tr>
<th>Program:</th>
<th>Actual (Previous Year)</th>
<th>Estimated (Current Year)</th>
<th>Proposed (Year of Implementation)</th>
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</thead>
<tbody>
<tr>
<td>Intercollegiate athletics</td>
<td></td>
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<tr>
<td>Radio, television, film</td>
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<td>Model U.N.</td>
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<tr>
<td>Agricultural Judging</td>
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<td><strong>Other</strong></td>
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<td><strong>TOTAL</strong></td>
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## Sources of Funds

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<thead>
<tr>
<th>Source:</th>
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<tbody>
<tr>
<td>General Fund</td>
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<tr>
<td>IRA</td>
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<td></td>
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<tr>
<td>Other</td>
<td>(Supplies and Services)</td>
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<td>Associated Student Body</td>
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<td>Program Revenue</td>
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<td>Foundations</td>
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<td></td>
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<tr>
<td>Private</td>
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<tr>
<td><strong>OTHER</strong> (Specify)</td>
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<tr>
<td>IRA Fee</td>
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<tr>
<td><strong>TOTAL</strong></td>
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</table>
Proposed Expenditures from the Instructionally Related Activities Fee

<table>
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<td></td>
</tr>
</tbody>
</table>

TOTAL:  


June 6, 2011

MEMORANDUM

TO: CSU Presidents

FROM: Charles B. Reed
       Chancellor

SUBJECT: Utilization of Campus Auxiliary Organizations – Executive Order 1059

Attached is a copy of Executive Order Number 1059, which establishes the California State University policy for appropriate utilization of campus auxiliary organizations.

This executive order augments and supplements the following executive orders pertaining to auxiliary organizations.

<table>
<thead>
<tr>
<th>No.</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>698</td>
<td>Board of Trustees Policy for the California State University</td>
</tr>
<tr>
<td></td>
<td>Auxiliary Organizations</td>
</tr>
<tr>
<td>731</td>
<td>Designation of Chief Financial Officer</td>
</tr>
<tr>
<td>732</td>
<td>Compilation of Policies and Procedures Pertaining to California</td>
</tr>
<tr>
<td></td>
<td>State University Auxiliary Organizations</td>
</tr>
<tr>
<td>751</td>
<td>Centers, Institutes, and Similar Organizations on Campuses of the</td>
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<tr>
<td></td>
<td>California State University</td>
</tr>
<tr>
<td>849</td>
<td>California State University Insurance Requirements</td>
</tr>
<tr>
<td>1000</td>
<td>Delegation of Fiscal Authority and Responsibility</td>
</tr>
</tbody>
</table>

In accordance with policy of the California State University, the campus president has responsibility for implementing executive orders where applicable and for maintaining the campus repository and index for all executive orders.

If you have questions regarding this executive order, please call Mr. George Ashkar, Assistant Vice Chancellor/Controller, Financial Services at (562) 951-4540If you have questions regarding this executive order, please call Mr. George Ashkar, Assistant Vice Chancellor/Controller, Financial Services at (562) 951-4540.

CBR/lje

Attachment

c: Vice Presidents, Finance/Administration
   Executive Staff, Office of the Chancellor
THE CALIFORNIA STATE UNIVERSITY
Office of the Chancellor
401 Golden Shore
Long Beach, California 90802-4210
562.951.4540

Executive Order: 1059

Effective Date: June 6, 2011

Supersedes: Executive Order No. 1052 and FS 2010-03

Title: Utilization of Campus Auxiliary Organizations

This executive order is issued pursuant to parts d. and h. of section VI of the Standing Orders of the Board of Trustees of The California State University, and the Education Code Sections 89720 et seq., 89756 and 89900 et seq. This executive order establishes the CSU policy for appropriate use of campus auxiliary organizations, superseding E.O. 1052 and FS 2010-03, and augments and supplements all other existing CSU policies pertaining to auxiliary organizations.

I. Campus Oversight of Auxiliary Organizations

A. Campus auxiliary organizations are California nonprofit corporations which are legally separate entities and are organized and operated solely for the benefit of the campus. The separate legal status of auxiliary organizations enables strategies that are important to the campus educational mission and provides capabilities essential to a comprehensive university.

B. Campus auxiliary organizations shall not operate outside the regulation and oversight of the campus.

C. The campus president is responsible and accountable for prudent judgment in the utilization of campus auxiliary organizations, for ensuring the fiscal viability of campus auxiliary organizations, and for compliance with applicable CSU policies.

D. The campus chief financial officer (CFO) shall be the primary responsible campus official in respect to administrative compliance and fiscal oversight of campus auxiliary organizations.

II. Campus Utilization of Auxiliary Organizations

A. The campus, with the approval of the chancellor (or designees), may assign certain functions to campus auxiliary organizations pursuant to the California Code
of Regulations, Title 5, Section 42500. A written agreement on behalf of the Board of Trustees, executed by the chancellor and the auxiliary organization, is required for the performance by an auxiliary organization of any of the functions listed in Section 42500, except for the student government activities of a student body organization.

B. Auxiliary organizations shall not perform any of the functions listed in Section 42500 unless the function has been specifically assigned in the operating agreement with the campus. The campus shall review, at least every five years, the auxiliary organizations to ensure that written operating agreements are current and that auxiliary organization activities are in compliance with those agreements. Confirmation that this review has been conducted will consist of either an updated operating agreement, or a letter from the campus president to the executive vice chancellor/chief financial officer (EVC) certifying that the review has been conducted. As part of these periodic reviews, the president should examine the need for each auxiliary and look at the efficiency of the auxiliary operations and administration.

C. The campus may choose to assign responsibility for an activity or program to an auxiliary organization. When the auxiliary accepts this responsibility it also assumes the associated legal obligations and liabilities, fiscal liabilities, and fiduciary responsibilities. Being accountable and responsible for an activity or program is referred to as ownership. Indications of ownership include:

- Authority and discretion to contract for services or materials required by the activity
- Responsibility for business losses
- Legal liability as an owner or principal entity
- Fiduciary obligations associated with the activity
- Responsibility for establishment of operating and administrative policies
- Primary control or discretion over the expenditure of funds

A determination of ownership of an activity or program is not necessarily tied to:

- Employment of individuals granted signatory authority related to the activity (e.g., person or persons who can sign a letter or other related documents on behalf of a principal entity)
- Ownership of the facility where the activity occurs
- Authority to request an expenditure
- Academic or similar programmatic control over the activity

III. Administration of Funds

A. The EVC may establish additional policy guidance associated with common campus activities to ensure consistent application of the rules regarding placement of funds established in this executive order. Placement refers to ownership of the funds and accounts where funds are deposited. Auxiliary organizations shall ensure that fiscal procedures and management systems are in place, consistent with Section 42401 of Title 5, to ensure effective coordination of auxiliary activities with the campus and in accordance with sound business practices.
B. Employees of the campus with documented delegation of fiscal authority, who may or may not be officers of the auxiliary organization, may request or approve the receipt or disbursement of funds held by a campus auxiliary organization, except those revenues listed in part D, below. The duly authorized chief operating officer of the auxiliary organization, or designees, shall establish documented corporate delegations of fiscal authority and ensure that receipts and disbursements comply with the auxiliary organization fiscal policies and internal controls, and with the written agreement with the university. The auxiliary organization shall retain any legal obligations and liabilities, fiscal liabilities, and fiduciary responsibilities associated with transactions initiated or approved by such campus employees with delegated authority.

C. Auxiliary organizations may accept or administer campus funds as an agent of the university (except those revenues listed in part D below) when specifically authorized in writing by the campus president or his/her designee. Said authorization shall be granted judiciously and only when it is advantageous to the university and supportive of the university mission. The authorization should include the rationale for making this choice and clearly articulate the advantages to the university.

D. The following revenues shall be solely the revenues of the campus and shall be reported in compliance with Executive Order No. 1000: Delegation of Fiscal Authority and Responsibility.

1. Revenues from CSU systemwide mandatory fees which includes student fees established and adjusted by the Board of Trustees and that must be paid to apply to, enroll in, or attend the university, or to pay the full cost of instruction required of some students by state statute.

2. Revenues from campus mandatory fees which include student fees established for a campus and that must be paid to enroll in or attend the university.

3. Revenues from campus student fees directly related to any state-supported course of instruction which includes Miscellaneous Course Fees and fees for materials, services, field trips, and travel.

4. Revenues from fees paid by matriculated CSU students to attend campus self-supported instructional programs for academic credit.

As the custodian of mandatory fees collected on behalf of a student body organization, the campus CFO may only disburse such funds upon the receipt of a request for payment. Other fees, if any, collected on behalf of a student body organization will be similarly administered unless otherwise designated by a student fee referendum.

The campus shall also collect and be the custodian of student body center fees. The campus CFO is responsible for ensuring auxiliary organization expenditures of student center fees comply with the approved purposes of the fees and with Board of Trustees and campus policy.
June 6, 2011

Charles B. Reed Chancellor
EDUCATION CODE
SECTION 89230

89230. "Instructionally related activities" means those activities and laboratory experiences that are at least partially sponsored by an academic discipline or department and that are, in the judgment of the president of a particular campus, with the approval of the trustees, integrally related to its formal instructional offerings.

Activities that 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 activities.

Instructionally related activities include, but are not limited to, all of the following:

(a) Intercollegiate athletics: costs that are necessary for a basic competitive program including equipment and supplies and scheduled travel, not 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 provided by the state. Purchase or rental of films as instructional aids shall not be included.

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(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 that are consistent with purposes included in the above may be added as they are identified.

Pursuant to this section and other provisions of this code, the Chancellor of the California State University shall develop a program of fiscal support and shall consult with the California State Student Association, the Academic Senate, and the Chancellor's Council of Presidents regarding the program.

This section shall not become operative unless funds are appropriated to meet the instructionally related needs of the campuses of the California State University.