1.0 PURPOSE:

The Instructionally Related Activities (IRA) Committee is established to advise the University President regarding the eligibility of activities for Instructionally Related Activities Fee funding and to recommend the level of funding for those activities. The guidelines described in this document establish procedures for this process.

2.0 REFERENCES FOR IRA GUIDELINES:

- Office of the Chancellor Executive Order Number 740, Subject: The California State University Student Fee Policy (April 2000).
- State University Administrative Manual (SUAM) - Business Affairs, Sections 000-3999.
- Education Code, Section 89230.
- Title V, Section 41800.2.

3.0 CSU POLICY:

The Instructionally Related Activities (IRA) Fee is established to provide support for essential educational experiences and activities that aid and supplement the educational mission of the University.

According to E.O. 429, the following procedures shall govern implementation of the Instructionally Related Activities (IRA) Fee:

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 system-wide policy.

Income from the IRA fee as distinguished from other revenues shall not be expended on matters that are tuitional. Thus, such income shall not be used to support faculty positions. 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.

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.

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.

Procedures for the collection and allocation of the IRA fee shall be developed by the Chancellor and issued by coded memorandum.

As indicated above, IRA funds “shall not be expended on matters that are tuitional.” Upon consultation, the Chancellor’s Office has clarified the term ‘tuitional’ as funds that support the basic operation of the university including the instructional program, operation and maintenance of the plant, student services, research, grants and scholarships, and other academic support. Fees charged to students by a campus can supplement the basic funding provided through tuition and the state general fund but may not replace funding sources for those items. Thus, IRA fee funds may not be used for items such as salaries for faculty positions, permanent facilities (on- or off-campus), or similar items. Additionally, the clearly defined one-time nature of all IRA funding awards helps to identify aspects of the university that are tuitional, by discerning whether or not a given aspect requires year-to-year funding to maintain.

4.0 CSU STANISLAUS COMMITTEE STRUCTURE AND DUTIES

The IRA Committee shall advise the University President regarding allocation of the IRA fee revenue.

The IRA Committee will consist of eight voting (8) members

- One (1)-administrator appointed by the University President.
- Four (4) student representatives, selected by Associated Students, Inc.
  - One student representative shall be the ASI President, who shall serve as Chair of the IRA Committee.
- Three (3) faculty representatives, recommended by Academic Senate Committee on Committees.

A quorum necessary to conduct Committee business shall consist of four (4) voting members, the majority of whom must be students.
Recommendations will be considered as approved by the Committee when endorsed by a majority of the voting members present.

The Committee Chair’s responsibilities shall include, but are not limited to, the following:

• Convene the IRA Committee at least once per semester;
• Provide an initial orientation to the members of the IRA Committee;
• Initiate and facilitate the process for campus submission of proposals for both eligibility and funding;
• Submit the IRA Committee’s recommendations to the University President; and
• Ensure that minutes are maintained and a documentary record is kept regarding all IRA matters.

The IRA Committee Administrative Support Assistant’s responsibilities shall include, but are not limited to, the following:

• Work closely with the Committee Chair;
• Attend and schedule all Committee meetings;
• Serve as a liaison between the Committee and the requestors;
• Create Committee agendas as well as take notes; and
• E-mail and receive proposals and memos from requestors.

5.0 CSU SYSTEM DEFINITIONS

According to EP&R 83-58, 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 formal objectives of the IRA fee are listed as follows:

A. To ensure stable and adequate funding for instructionally related activities as defined herein.

[N.B.: the Chancellor’s Office has clarified that the wording on this point pertains to the stability of the IRA fee and funding as a whole, and does not refer to any specific programs or activities that may be supported by IRA funding in any given year. It is important to note that any specific IRA funding award is one-time funding, and is not guaranteed for any specific program or request year-to-year.]

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.

Instructionally Related Activities are those activities and laboratory experiences (defined as any place, situation, set of conditions, or the like, conducive to experimentation, observation, investigation, etc.) that are at least partially sponsored by or related to an academic discipline and that are, in the judgment of the President, integrally related to its formal instructional offerings.
Activities considered essential to a quality educational program and an important instructional experience for any student enrolled in a University academic program may be considered instructionally related.

By CSU System directive, instructionally related activities include, but are not limited to, the categories listed below:

- **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.

- **Radio, television, and film:** costs related to the provision of basic “hands-on” experience not provided by the state. Purchase or rental of films as instructional aids shall not be included.

- **Music and dance performances:** 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.

- **Drama and musical productions:** basic support of theatrical and operatic activities sufficient to permit experience not only in actual performance but in production, direction, set design and other elements considered a part of professional training in those fields.

- **Art exhibits:** support for student art shows given in connection with degree programs.

- **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.

- **Forensics:** activities designed to provide experience in debate, public speaking, and related programs, including travel required for a competitive debate program.

- **Other activities:** activities associated with other instructional areas that are consistent with the purposes included in the above may be added as they are identified and approved by the campus President. Already identified and approved system-wide are Model United Nations activities, and Agricultural judging.

  *Inclusion of a particular activity on the above list or in Education Code Section 89230 does not per se require funding of that activity.*

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 instructionally related and distinct from procedures for determining the level of funding of eligible activities.
It is important to note that all IRA funding awards to eligible entities is considered one-time funding, awarded annually. As such, no rollover of funds from year-to-year is permitted, and programs are cautioned not to rely upon IRA funding for multi-year budgeting.

In order to increase the capacity to fund as many proposals as possible in a year containing a large number of highly qualified proposals, a minimum of 10 percent of IRA funds available for distribution in a given year shall be carried forward into the next year.

6.0 CSU STANISLAUS GUIDELINES FOR DETERMINING ELIGIBILITY AND AWARDS FOR IRA REQUESTS

6.01 Eligibility Criteria

The IRA Committee shall use the following criterion to determine eligibility of an applicant sponsoring unit for funding requests:

- The IRA-recognized unit (department or program) must reside within one or more of the University's official divisions or be listed on the University's roster of officially recognized student organizations.

6.02 Award Selection Criteria

The IRA Committee shall utilize the following criteria to determine whether and to what extent to honor funding requests from eligible applicant sponsoring units:

- As indicated in E.O. 429 and noted in section 3.0, funding shall not be tuitional in nature. Requests that are tuitional in nature (e.g., funding proposed for faculty positions or renovation of facilities) are not eligible for IRA funding.

- IRA funding supports instructionally related activities. The application for funding (for activities, equipment, events, guest artists or speakers, etc.) must address, at least partially, instructionally related outcomes for students.

- IRA funding proposals from specific departments, programs, or activities already receiving funding from campus-wide dedicated student fees may complement but may not duplicate or extend directly activities or programming accomplished via the dedicated student fees.

- The IRA Committee will evaluate the quality of and rate each proposal in terms of clarity of purpose, potential impact, priorities set within the proposed funding, reasonableness of the proposed budget, and proposed strategy for assessment of the desired activity’s impact.

- Among proposals rated equal in quality and in aggregated ratings of clarity of purpose, potential impact, priorities set within the proposed funding,
reasonableness of the proposed budget, and proposed strategy for assessment of desired activity’s, the IRA Committee shall grant priority to proposals designed to be open and accessible to the general student population.

7.0. **CSU STANISLAUS PROCEDURES:**

**Eligibility Determination**

In accordance with Sections 5.0 and 6.01 above, for the purpose of determining eligibility of applicant sponsoring units, notice (non-binding) of intent to request IRA funding must be submitted in writing to the IRA committee chair or designee no later than the first Monday of November for the following academic year. The IRA Committee may grant exceptions to this deadline for compelling reasons. The notice need only address the identity of the proposed sponsoring unit(s), but must contain sufficient specificity to permit an assessment of eligibility by the IRA Committee. Eligibility decisions may be appealed to the IRA Committee within two weeks after notification of such decisions to those who submitted notice of intent.

Once units on campus are determined as eligible for IRA funding, they do not need to resubmit this request, as eligibility has been formally established, unless resubmission is specifically requested by the IRA committee.

**IRA Funding Request Proposals**

IRA funding request proposals must be submitted in writing to the IRA committee chair or designee no later than the census date of spring semester for the following academic year. The Funding Proposal form, along with a sample proposal, can be found on the University Website.

Each IRA-recognized unit may submit only one application per funding year. Those IRA-recognized units applying for funding for multiple activities or courses contained within, (e.g., an academic department) should submit a combined application, with different activities presented as separate sections or categories within the application narrative and proposed budget.

IRA Funding Proposals must contain:

1. A Cover memo listing the applicant sponsoring unit(s), the instructional and other essential elements of the proposed activity, and how these would be supported by IRA funding.

2. A Funding Request Budget Outline for the present application which includes the following additional budget information attached with the outline:
   a) Line item summary budget of all proposed activity costs and expenses. This should include information about all funding sources for the proposed activity or activities, not only proposed IRA funding.
   b) Proposals requesting an *increase* in funds from previous awards must include a statement detailing the reasons for the increase.
c) A detailed summary of program activities, equipment, events, guest artists or speakers, etc. Include in the summary who among the student body might benefit from the proposal the estimated number of students served and non-IRA, non-tuitional funding sources for those activities.

Report on Expenditures and Objectives for Previous Year’s Funding

On the first Monday of November each year, all IRA funding recipients from the previous academic year must submit a mandatory report containing a summary of the previous academic year’s expenditures and a short narrative of program activities explaining how objectives for the funding were met.

Failure to submit this report by the deadline may preclude eligibility for funding for the following year.

• Designated Program Manager:

A Program Manager must be identified in the proposal. The Program Manager must be University faculty or staff, and is responsible for administrative management of funding for the activity or activities proposed, or for supervising personnel leading and managing those activities. The Program Manager must submit the IRA Funding Request, the Report on Expenditures and Objectives for Previous Year’s Funding and act as liaison between the sponsoring unit(s) and the IRA Committee.

The Program Manager shall:
1. Prepare the IRA Funding Request Proposal in consultation with appropriate eligible applicant sponsoring-unit personnel.
2. Submit the signed IRA Funding Request Proposal to the IRA Committee.
3. Appear before the IRA Committee, if requested, to present and discuss the request for funding.
4. Prepare and submit additional material relating to the funding request, as requested by the IRA committee all in accordance with previously-articulated deadlines.
5. Inform and provide a copy of the proposal to the Academic or Administrative Chair or contact person.

The IRA Committee considers it beneficial to have requestors list priorities, especially with large requests, as it may not be possible to grant 100% of all funds for some proposals some years.

• Maintenance of IRA accounts

The Business & Financial Services Office shall maintain the IRA trust fund. Additionally, it shall:
- Maintain revenue/expenditure records for all funded activities.
- Prepare and submit year-end financial statements for all funded activities to the IRA committee and Designated Program Managers.
- Provide additional financial information and services to the IRA Committee as outlined in the Memorandum of Understanding.

8.0 **CHANGES TO GUIDELINES**

The University President may alter extant guidelines only after consultation with the IRA Committee. Proposed changes to the guidelines by the IRA Committee must be endorsed by the majority of the Committee members, with quorum restrictions applicable, before submission of the recommended changes to the University President for approval.

Any new interpretations or Executive Orders issued by the Chancellor’s Office are considered to supersede these procedures.

Mariam Salameh, IRA Chair ____________________________ Date: ____________

Joseph F. Sheley, President ____________________________ Date: ____________