

California State University, San Bernardino Instructionally Related Activities (IRA) Guidelines

I. Purpose:

Instructionally Related Activities (IRA) are supplemental activities that enrich the educational experience, University life, and broader community. In the past, the Committee has considered both small and large programs, attempting to distribute the funds in a manner which confers the greatest benefit to the whole University community.

II. IRA Policy and Regulatory Oversight:

- a. Office of the Chancellor Executive Order Number 1102, Subject: The California State University Student Fee Policy (July 2015).
 - i. [LINK](#)
- b. Office of the Chancellor Coded Memo EP&R, 83-58.
- c. CSU Legal Accounting and Reporting Manual, Chapter 12.
- d. California Education Code, Section 89230 ([LINK](#))

III. Background Information

- a. The Instructionally Related Activities Fee is a fee students assess themselves through a referendum election following standard Chancellor's Office procedures.
- b. The IRA fee provides student fee funding for out-of-class experiences that are integral to a quality educational experience, supporting students in an academic program, discipline, or department, and relating to an instructional course. Such activities are deemed essential for providing a quality educational program and constitute a vital and/or enhanced instructional experience for students.

IV. CSUSB IRA Committee Structure and Duties

The Instructionally Related Activities Committee is a student-run campus committee, composed of six students, three faculty and three administrators and is co-chaired by the Vice President of Finance of the Associated Students, Inc., and the AVP for Student Affairs/Dean of Students or designee(s). This committee is established under Executive Order 1102 and demonstrates a commitment to shared governance.

- a. Three (3) Faculty representatives will be appointed through the CSUSB Faculty Senate Committee process and have voting rights.
 - a. Faculty representatives shall be appointed to three (3) year terms of service, and the appointed faculty representatives must not be from the same college.
- b. Five (5) student representatives will be assigned through the committee selection process by the ASI Vice President and the ASI Vice President of Finance, and all student representatives shall have voting rights.
 - a. Student representatives shall be appointed to one (1) year term of service, subject to the appointment (and reappointment) by the ASI Vice President and/or the ASI VP of Finance.
 - b. Among the assigned student representatives, at least one student representative shall be a graduate student (enrolled in a postbaccalaureate

- program), and one student representative shall be based at the Palm Desert Campus.
- i. Any student representative can hold dual representation of graduate students and PDC student interests.
 - c. The ASI VP of Finance will serve as the co-Chair of the IRA Committee and will have voting rights.
 - c. Two (2) administrator representatives will be appointed by the AVP for Student Affairs/Dean of Students and/or designee(s), under consultation with the Vice President for Student Affairs and/or the University President.
 - a. Administrator representatives shall be appointed to one (1) year term of service, subject to the appointment (and reappointment) by the AVP for Student Affairs/Dean of Students or designee(s)
 - b. The AVP for Student Affairs/Dean of Students will serve as the co-Chair of the IRA Committee and will have voting rights.
 - d. The AVP for Student Affairs/Dean of Students shall appoint no more than two Ex-Officio (Non-Voting) members.
 - a. Ex-Officio (Non-Voting) Members will support the administrative functions of the IRA Committee and will aid the committee in policy or regulatory matters, solicitation of annual proposals, receiving and maintaining records, and responding to systemwide or university inquiries.
 - e. The IRA Committee is charged with the responsibility of the fiscal oversight of the IRA fee fund, evaluating proposals, and making recommendations for support and funding allocations to the President's Office, as part of the IRA fiscal activities and the annual IRA proposal process.
 - a. The IRA Committee will provide annual funding proposals to the University President, verifying that all activities meet the regulatory guidelines of IRA and adhere to university fiscal guidelines.
 - f. To approve, discuss, or deny IRA Committee business, a majority vote is required, consisting of at least four (4) students votes.
 - a. Members may participate in meetings via phone or video/web conferencing but may not provide a proxy or designate another member to vote on their behalf.
 - b. At the discretion of the IRA Committee Co-Chairs, virtual votes are allowed for supplemental budget requests, reallocation or budget amendment requests, and/or time sensitive situations.
 - c. If a majority vote is not obtained or if necessary to meet expected timelines, the IRA co-chairs, in consultation with the committee, hold the right to make executive decisions to ensure the IRA process continues without negatively impacting the student experience or IRA operations.
 - g. The responsibilities of the IRA Committee Co-Chairs shall include, but are not limited to, the following:
 - i. Ensure Committee membership is established in Fall semester;
 - ii. Provide an initial orientation to the members of the IRA Committee;
 - 1. Ex-Officio members shall provide support as needed
 - iii. Initiate and facilitate the process for campus submission of proposals for funding;
 - iv. Convene the IRA Committee to review applications;
 - v. Submit the IRA Committee's recommendations to the President;

- vi. Ensure that agendas and minutes are maintained, and a documentary record is kept regarding all IRA matters.
- V. IRA fee funds that are designated to Athletics, Sport Clubs, or Special Events & Guest Services, will be managed by the designated units or divisions. The IRA Committee does not have delegated authority over the management of these funds and fall under the purview of the Division of Finance, Technology, and Operations.

VI. Committee Conflict of Interest Guidelines

- a. Conflict of interest is defined as:
 - i. Faculty members who are members of a department or program that puts forth a submission.
 - ii. Faculty members who are directly involved in a program or project outside their department that puts forth a submission.
 - iii. Students who are employed by or are directly involved in an area that puts forth a submission.
 - iv. A student's declared major does not preclude them from voting on proposals that relate to that academic department.
- b. Rules for Handling Conflicts of Interests:
 - i. Anyone with a conflict must abstain from participation in the discussion about or voting on that particular proposal. It is allowable for the committee to reach out to presiding members who have a conflict of interest, for the purpose of obtaining clarification on proposals, with a majority vote of the committee.
 - ii. Voting is to be based solely on the proposals at hand.
 - iii. Those with conflicts of interests are allowed to stay in the room as the proposal is discussed.
 - iv. A student's declared major does not preclude them from voting on proposals that relate to that academic department.

VII. Generated Project Revenue.

Generated revenues will remain in the possession of the project and be carried over by the project. Such revenues will be reported to the IRA Committee as part of the budget process.

VIII. Definition and Eligibility of IRA Programs

- a. The CA Education Code will define the criteria for IRA funding.
- b. In accordance with the CA Education Code Article 4. Instructionally Related Activities [89230-89230] ([LINK](#)), "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.
- c. 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.
- d. 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.
- 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. Theatre 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 these fields.
- e. Art exhibits: support for student art shows given in connection with degree programs.
- f. Publications: the costs to support and operate basic publication programs including a periodic newspaper and other laboratory experience basic to journalism and literary training. Additional publications designed primarily to inform or entertain shall 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 that are consistent with purposes included in the above may be added as they are identified.

IX. Sponsored by an academic department.

Instructionally related activities must be sponsored by an Academic Dean or Department, and in the judgment of the University President, must be integrally related to the University’s formal instructional offering.

- a. Sponsored is defined as direct or indirect support, including space allocations, personnel support, equipment support, course development, etc.
- b. "Integrally related" refers to an activity that is essential to the theoretical knowledge of a subject, creating a dependent relationship with its function, meaning, or purpose.

X. New Instructionally Related Activities

- a. A majority of the IRA Committee must agree that new programs meet the criteria for instructionally related activities for these programs to be considered for funding.

XI. All students are considered; involves any and all interested students.

XII. IRA Evaluation Criteria.

- a. Benefit of activity
- b. Under the purview of the State of California Education Code and deemed essential by the IRA Committee (under consultation with the University President or designee(s) to a quality educational experience, all IRA activities must:

- a. Be important (instructional) experience for students enrolled in the instructionally related activity, to support student success.
 - b. Integral to the formal instructional offerings of the University
- c. Adheres to established goals,
- d. Each approved activity will be asked to establish goals and outcomes.
- e. Establishes a rigorous and transparent methodology to evaluate the effectiveness of the activity, ensuring accountability by measuring its impact on students' university experience and academic success.
 - a. Findings and assessments will be systematically documented and reported to the governing committee for oversight.
- f. Demonstrates fiscal responsibility by ensuring that all funds are allocated and utilized efficiently, transparently, and in direct support of the intended activities.
 - a. Adheres strictly to IRA guidelines and policies by maintaining accurate financial records and following approved budgeting procedures.
 - b. Regular reviews and reporting mechanisms are implemented to ensure accountability, prevent misuse of funds, and align expenditures with the approved funding allocation.

XIII. Definitions of Ineligible Programs.

Programs and activities not directly aligned with the purpose of IRA are generally ineligible for IRA funding. The IRA fee cannot be used to support activities that are mandatory for course credit. Instead, IRA funding is intended to enhance the classroom experience without affecting course availability or academic requirements. Eligible programs are those that maintain a clear academic connection while operating independently from the classroom setting, possessing their own purpose, identity, and organizational structure (e.g., Humanities Film Series, Intercollegiate Club Sports).

XIV. Fiscal Responsibility.

- a. Funded activities are expected to assume responsibility for the proper management and accounting of allocated funds as follows:
- b. All IRA funding 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.
- c. IRA funding is a student fee-based allocation, and is subject to fluctuations, due to changes in enrollment.
 - a. Each year, the IRAB will create a \$50,000 - \$100,000 reserve to protect against an unanticipated shortfall in enrollment and to provide for unanticipated supplemental requests.
 - b. If funds remain at the end-of-the-year, monies will be retained in the IRA fund, for redistribution for the next academic year or placed in the fund reserves.
 - c. IRA funds are restricted and cannot be reallocated to non-IRA activities.
- d. The Activity Lead is responsible for the overall management of the allocated funds, including collaborating with students to determine how the funds will be used to support the activity.
- e. The Activity Lead must notify the IRA Committee if unforeseen changes in funding needs occur.
- f. The Activity Lead is expected to monitor expenditure on a monthly basis.

- g. The activity must take responsibility for some form of self-help effort, such as fundraising projects, ticket sales, and advertisement revenues, whenever possible. This is important to ensure sustainability and reduce over-reliance on IRA funding.
- h. The Activity Lead must arrange for recognition of the IRA fee financial support in all publicity for events and programs, (example: “This program is supported in part by CSUSB Students through their Instructionally Related Activities Fee”).
- i. Activity Leads are required to submit a mid-year and year-end summative report. It is mandatory that projects stay within their approved budgets.
- j. New IRA activities will require a majority vote by the IRA Committee and approval by the University President or designee(s).

XV. Definition of Budget Line Items.

- a. *Supplies and Services.* Supplies and Services are operating expenses used exclusively by the project and activity.
 - a. Instructionally Related Activities will need to provide an itemized list of the anticipated supplies and services.
 - b. Any purchases made with IRA funds shall remain under the ownership of the activity, and shall not be utilized by non-IRA activities, programs, or projects.
 - c. Examples may include but are not limited to materials that allow students to practice and apply the activity’s learning outcomes, production materials (e.g., costumes, supplies related to set design or theatre/musical productions), materials for student art displays, promotional materials for the IRA activity, and registration fees.
- b. *Travel.* Expenses of student participants including, but not limited to registration fees, transportation, per diems, and lodging costs incurred during project-related trips. IRA funds cannot be used for faculty travel expenses. The sponsoring academic department should fund travel related expenses for affiliated faculty and staff.
 - a. Instructionally related activities will need to provide a justification of any travel related expense, including how participants are selected to participate, and how this expense type directly supports the activity’s objectives, aligns with established goals, and demonstrates necessity and reasonableness of the funding proposal.
- c. *Printing.* Those printing costs are directly related to the project.
 - a. Both campus duplicating and printing off-campus are allowable expense categories.
 - b. If off-campus printing is requested, the IRA Lead must provide a justification of not utilizing Campus Duplicating, and a written right of refusal.
- d. *Equipment.* Equipment items which are used exclusively for the activity. **Equipment which may be used jointly by the project and department or others within the University must be purchased using non-IRA Fee funds.**
- e. *Telephone.* In general, the telephone expenses are to be covered by the sponsoring department, and not a permissible IRA expense. **Exceptions may be allowed by the IRA Committee**
- f. *Temporary Help.* Personnel costs for technical and/or professional help are generally considered to be the responsibility of the University, not the IRA Committee. When special circumstances exist, such costs may be considered as an appropriate IRA budget item.

- a. Additional justification will need to be provided, including the rationale of temporary help (e.g., assessment of the project's operational needs, estimated number of student assistants required, how salary costs were calculated), how the funding proposal was determined, and how this expense type directly supports the activities' goals and objectives.
- b. Examples of special circumstances include wages for guest musicians for musical performances that are outside the scope of the IRA student participants and deemed operationally necessary.
 - i. Anticipated costs should be on an as needed basis, encompassing short-term needs, such as one semester's performance.
- g. *Student Assistants.*
 - a. Funds can be used to pay student assistants (personnel) as long as their work is directly connected to and necessary for carrying out the specific activity being funded. The costs must be justified as essential to the project's operations and not for unrelated tasks.
 - i. Students who are part of the IRA activity should be receiving academic credit.
 - ii. Employment should be offered to support the programmatic aspects of the instructionally related activity and should not be the sole method of activity participation.

XVI. IRA Annual Budget Proposal Process

- a. During each spring term, a campus communication will be sent to open the application process for IRA proposals for the following academic year.
- b. IRA Activity Leads will complete the application and budget form (including full operational costs, sources of revenue, and budget narrative) requiring signature(s) from the Department Chair and/or Dean. All Instructionally Related Activity Leads will then submit the completed proposal to the IRA Committee via the selected submission platform.
- c. Ex-Officio members will manage and track all proposals and will compile the submissions for the IRA Committee review.
- d. IRA Committee will review all IRA submissions, and will utilize the evaluation criteria and established rubric to determine the following:
 - i. Does the Instructionally Related Activity meet the established purpose as stated by the CA Education Code?
 - ii. Does the Instructionally Related Activity meet the established IRA eligibility requirements, as stated in the approved guidelines?
 - a. Is the instructionally related activity eligible to receive IRA funding.
 - iii. The allocated funding per budget line item.
- e. The IRA Committee will forward completed allocation recommendation to the President via the Vice President's Office for Student Affairs. (The memorandum will include the totals for each program with accompanying line-item allocations per expense account category.)
- f. The President acts on the recommendations and will return the memorandum to the Vice President's Office for Student Affairs.

- i. The President and/or designee(s) has final authorization of funding approvals and may request additional information or revisions from the IRA Committee.
- g. The Vice President's Office for Student Affairs will send line-item allocations as approved by the President to the University's Budget Office to process the IRA budget uploads.
- h. IRA ex-officio members will facilitate the dissemination and monitoring of IRA agreement letters and will report to the IRA Committee of questions or concerns that may arise.
- i. The IRA Co-Chair(s) reserves the right to determine IRA allocations, if the IRA Committee does not comply with established deadlines and expectations.
- j. It is the responsibility of the IRA Co-Chair(s) to ensure timely processing of annual awards, to ensure IRA funded activities operate on a consistent basis and support the student experience.
- k. **Unspent IRA Funds:** Any funds not spent will be returned to the IRA Committee/designated IRA fund unallocated. It is the current guideline of the committee that there will be no carryover for any activity. Funds will automatically revert to the IRA Committee unallocated and will be added to the overall fund balance for future allocations.

XVII. Supplemental and Reallocation Budget Requests

Supplemental requests are defined as those requests for support which are made on behalf of an IRA designated activity, requiring funds during the current fiscal year.

- a. Supplemental requests differ from proposals received during the normal annual budget process in the spring preceding the next fiscal (academic) year.
- b. Programs seeking supplemental funding may or may not have received funding in the annual process.
- c. Normally, supplemental requests will not be considered from programs unless circumstances have arisen which could not have been foreseen at the time of the normal annual budget procedure. It is assumed that those programs receiving support during the normal annual budget process will plan a level of activity commensurate with annual funds provided.
- d. Reallocation budget requests may be considered and will require IRA Committee approval through a voting process. Instructionally related activities are instructed not to proceed with any budget changes until written confirmation is received.
 - i. For requests totaling \$1,000 or less, the IRA Committee Co-Chairs may have the authority to approve on the committee's behalf, as deemed appropriate.
- e. College analysts will be required to verify all requests, prior to submissions to the IRA Committee.

XVIII. Fiscal Transparency and Expectations

- a. As a Category II (student based) fee, the IRA Committee will announce funding awards on an annual basis, promoting funded instructionally related activities as student funded activities.
- b. IRA ex-officio members will maintain the IRA website, hosted by the Division of Student Affairs, ensuring annual updates and accurate information.

- c. All Instructionally Related Activities must comply with all established deadlines and expectations will be strictly enforced.
 - i. Failure to comply will result in a revoke of funding for at least one (1) academic year, as approved by a majority committee vote.
 - 1. Established deadlines include, but are not limited to mid-year reports, end of the year summative reports, and campus year-end fiscal deadlines.
 - 2. The IRA Committee reserves the right to determine the ineligibility period, and the IRA Co-Chairs will communicate with the President and/or designee.