



Instructionally Related Activities (IRA) Budget Request Guidelines

The following guidelines are provided to clarify IRA funding criteria and assist you in the preparation of your IRA budget request. Approximately 10% of the IRA budget funds are reserved specifically to support new budget requests. Availability of IRA funds is dependent on student enrollment.

The IRA Advisory Board is commissioned by the Student Fee Advisory Committee (SFAC) to review IRA requests. Ultimately, the IRA Advisory Board will forward recommendations to SFAC for consideration and further endorsement before being advanced to the President for final review and action (see SFSU's Procedures to Implement California State University Student Fee Policy – Executive Order 1102). Fee allocation decisions are guided by procedures and criteria that are viewpoint neutral in nature. Applications and program activities are evaluated based on whether they are essential to a quality educational program and provide important instructional experiences for students enrolled in the respective programs. Applicants can appeal funding decisions within the specified timeframe.

FUNDING PRIORITY

The highest priority for funding is generally given to IRA programs involving students in all facets of their activities. Programs operated by faculty/staff for the benefit of students are generally given lower priority. For example, online journals funded totally or in part from the IRA budget should be produced by students, and the content should include at least 95% student work. Online journals published by faculty/staff for distribution to students will be given lower priority. The names, class standing, and major of those students who contribute their work to a journal must be published as a part of the online journal.

FUNDING RESTRICTIONS & REQUIREMENTS

IRA Budget Request Proposal submissions that do not fully comply with the following guidelines may not be considered for funding.

- Departments are **strongly encouraged** to establish a separate trust account for each IRA program that is expected to remain active from year to year.
- Departments who choose to deposit allocations for multiple IRA programs into a single trust account will be required to submit the following additional information for the IRA Advisory Board's review:
 - Justification for the use of a single Trust Account for IRA funds allocated to multiple programs within the department. Justification should include specific safeguards to be used in the accounting of expenditures for each program sharing the Trust Account;

- A copy of the Trust Account Agreement, which is to be updated in accordance with procedures established by Fiscal Affairs. The Trust Account Agreement must articulate the following:
 - the specific purpose for each IRA program sharing the account;
 - funding sources applicable to each IRA program sharing the account;
 - expense type(s) applicable to each IRA program sharing the account and;
 - describe fund maintenance/disposition of funds specific to each IRA program sharing the account. The aforementioned information may be provided in an addendum to the Trust Account Agreement and must accompany the IRA Budget Request Proposal for each program seeking IRA funding.
- Programs must ensure that expenditures reflected on their Attachment C – Program Activity Report are clearly distinguished and separate from expenditures of the other programs sharing the trust account.
- IRA allocations are expected to be used in their entirety each year. Programs must use a minimum of 80% of a single year’s allocation. Remaining funds may be carried forward for no more than 3 years. IRA funds held in program accounts inappropriately are subject to retrieval by the Student Fee Advisory Committee for redistribution in the next budget cycle.
- Requests for Student Assistant funding must include a description of the specific job duties that give students an extended, hands-on educational experience and follow San Francisco minimum wage requirements. (Clerical work may not be eligible for funding.)
- Effective 2014/2015, print versions of journals will not be funded. Journals need to transition completely to an online format.
- IRA funding may not be used for tuitional purposes (i.e. to support faculty positions, or to pay guest faculty, guest artists, or honoraria).
- IRA funding may not be used to purchase food, except as travel per diem.
- IRA funds may not be used to award cash prizes.
- IRA funds may only be used for approved expenditures that are identified in the IRA Budget Request Proposal. Spending IRA funds on unauthorized expenditures may jeopardize future funding.
- If IRA funds requested to purchase equipment, applicants must include:
 - Justification for equipment need.
 - Justification for how it will contribute toward the success of the program.
 - Explanation regarding why the purchase must be made with IRA funding.
 - A price quote from the vendor; and
 - Storage location, security, and maintenance plans for the equipment.

- Programs submitting budget requests that are significantly larger than allocations in previous years must include an explanation for the increase.
- IRA funds may be used to support travel for individual students in accordance with the [Independent Student Travel Guidelines and Procedures](#). Please note that overlap in IRA funding is prohibited: a student will not be funded for independent travel if the student is eligible to receive funds to attend the same event through another IRA-funded program.
- IRA funds may be used to support faculty travel expenses associated with instructionally related student activities. Such requests will be decided on a case-by-case basis.

REVENUE

Where applicable, IRA funding requestors are encouraged to earn revenue in order to provide additional funding for their programs, and to maximize the distribution of IRA fee funding (see University Executive Directive #89-13 on the "Use of Buildings and Grounds" - Page 4 for guidelines on commercial activities on campus). Revenue projections are to be included in the budget request.

RECALLING OF IRA FUNDS

IRA funded programs are expected to spend their entire allocation in the year for which it is awarded. The Student Fee Advisory Committee, upon the recommendation of the IRA Advisory Board, reserves the right to recall IRA funds allocated to any program. IRA funded programs with no activity in their IRA trust account within the period of time established by the IRA Advisory Board, and programs whose trust account balance exceeds their immediate needs, may be asked to return their account balance to Student Affairs & Enrollment Management. IRA funds that are recalled will be made available for redistribution to active IRA programs based on the recommendation(s) of the IRA Advisory Board.

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