Cal State Fullerton

IRA Information Sessions with Campus Partners

Fall 2024

September 12, 2024

10:00am -12:00 pm

Zoom Session

IRA INFO SESSIONS
objective and format

Objective

1.   You receive value-added information to help ensure your program runs smoothly.

2.   You walk away with resources and a network of contacts you can call if you need support.

3.   After leaving this meeting, you connect with your appropriate team members to develop a plan and put the plan into action.

Format

•   Breakout sessions by topic instead of one long session so you only attend sessions relevant to your program

•   In addition to policy information, sessions include tips, ways to streamline, and ideal/best practices.

•   Each breakout session runs 40 min (last 10 min Q&A). You can add questions to the chat at any time during the presentation and they will be responded to at the end of the session. If time runs out, the questions will be responded to via email or via an FAQs page.

•   Thanks in advance for completing the survey at the end of each session! We use your feedback to make adjustments and improve future info sessions.

INFO SESSION SCHEDULE

ALL SESSIONS WILL BE RECORDED
with slides uploaded to the IRA Website

Budget Clarity
Unlock the power of financial clarity! In this session, you'll delve into the Chart of Accounts, also known as the Chartfield string, and gain an understanding of account, fund, class, and program codes. Discover how these Chartfield strings craft your budget story within OBIEE, CSUF's financial reporting tool. You'll also learn how to efficiently run and interpret revenue and expense reports.

Procurement Pathways
Discover the various methods for procuring goods and services, tailored to meet the unique needs of your program. Learn when to create a Purchase Order, how to obtain IT Authorization, secure a Q Number from E-Business, and effectively use a Procurement Card for seamless transactions.

Streamlined Success
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Efficient Hiring
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Global Journeys
Gain the expertise to navigate study abroad programs effectively. Learn about CSUF's requirements and processes for proposing, coordinating, and leading a department/faculty-led program abroad. Understand how Study Abroad and Global Engagement (SAGE) partners with Risk Management to manage risk, ensure student safety, and follow related university protocols.

Schedule of Events

Welcome Session (All) 10:00 am- 10:30 am

Break (All) 10:30am- 10:35 am

Session 1 (Pre-Assigned) 10:35 am -11:15 am

Break (All) 11:15 am -11:20 am

Session 2 (Participant Choice, 5 Sessions) 11:20 am- 12:00 pm

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You Are Appreciated!

Dave Edwards
Executive Director
Associated Students Inc.

Susan Collins
Associate Director,
Corporate Affairs
Associated Students Inc.

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MEET THE 2024-25 IRA COMMITTEE

All colleges are represented by one student and one faculty member

ADMINISTRATORS

- Natalie Azzouni, Committee Oversight Analyst, Student Affairs
- Alisa Flowers, Chief of Operations, Student Affairs
- Alyssa Adamson, Assistant Vice President of Academic Financial Services, Admin & Finance
- Bonnie Li Victorino, Director of Academic Financial Services, Admin & Finance
- Raymond Juanico, Manager, Resource Planning & Budget, Admin & Finance

STUDENT REPS

- Kasandra Miranda-Verdin, ARTS
- Feyi Adebajo, CBE
- Danielle Alam, CCOM
- Sonal Mogra, ECS
- Brian Walkley, EDU
- Tori Purcell, HHD
- Sedona Escudero, HSS
- Aldrin DeGuzman, NSM
- Brian Rubio, CHAIR

FACULTY REPS

- Randall Goldberg, ARTS
- Zhen (Jay) Yang, CBE
- Micheal McAlexander, CCOM
- Deepak Sharma, ECS
- Aja McKee, EDU
- Deanna Jung, HHD
- Zia Salim, HSS
- Joseph Carlin, NSM

DIVISION REPS

- Sharon Ting, Academic Affairs
- Dawn Macy, Student Affairs
- Raymond Juanico, Admin and Finance
- Linh Tran, President's Office

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THE PURPOSE OF THE IRA FEE

IRA is governed under the CSU Chancellor Office Executive Order 429, which states the procedures in accordance with guidelines adopted by the Board of Trustees. These procedures address the handling of IRA fees and the campus President's delegation authority.

The IRA Fee was established by the California State University system in 1978 to "provide support for essential educational experiences and activities that aid and supplement the fundamental educational mission of the University."
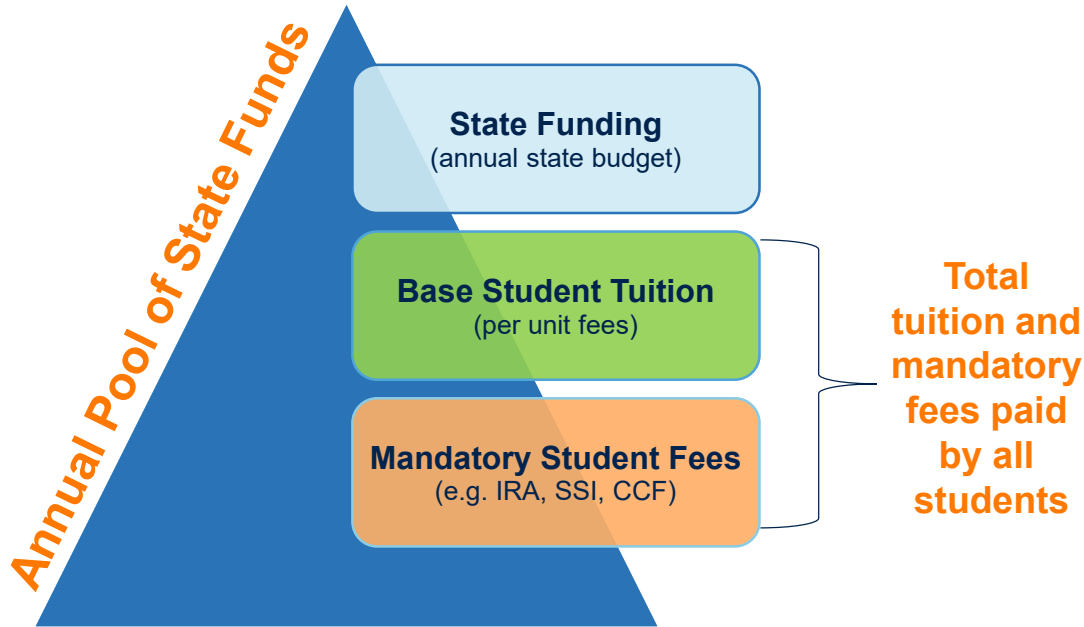
Fall 24 Fee Rate - $45.85

- category II fee
- mandatory fee paid by all students
- established or adjusted by student fee referendum or alternative consultation

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IRA FEE EXPLAINED…
Instructionally Related Activities (IRA): student fees are state funds (not external grants)

Annual Pool of State Funds

State Funding (annual state budget)

Base Student Tuition (per unit fees)

Mandatory Student Fees (e.g. IRA, SSI, CCF)

Total tuition and mandatory fees paid by all students

CSUF | Student Business Services — ADMINISTRATION AND FINANCE

Fall 2024 Registration and Tuition Fees

Student Business Services (GH 180)
(657) 278-2495 or sbs@fullerton.edu

The CSU makes every effort to keep student costs to a minimum. Fees listed in published schedules or student accounts may need to be increased when public funding is inadequate. Therefore, CSU must reserve the right, even after fees are initially charged or initial fee payments are made, to increase or modify any listed fees. All listed fees, other than mandatory systemwide fees, are subject to change without notice, until the date when instruction for a particular semester or quarter has begun. All CSU listed fees should be regarded as estimates that are subject to change upon approval by the Board of Trustees, the Chancellor, or the Presidents, as appropriate. Changes in mandatory systemwide fees will be made in accordance with the requirements of the Working Families Student Fee Transparency and Accountability Act (Sections 66028 - 66028.6 of the Education Code).

	Undergraduate Programs		Credential Programs		Graduate and Other Post-Baccalaureate Programs		Education Doctorate Program	Doctor of Nursing Practice
	0 - 6 Units	7 or More Units	0 - 6 Units	7 or More Units	0 - 6 Units	7 or More Units	All Students	All Students
Tuition Fee	1,764.00	3,042.00	2,049.00	3,531.00	2,208.00	3,804.00	6,273.00	8,094.00
Student Representation Fee	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00

Campus-Based Fees ($692.81)

Student Success Fee	230.54	230.54	230.54	230.54	230.54	230.54	230.54	230.54
Associated Student Body Fee	94.23	94.23	94.23	94.23	94.23	94.23	94.23	94.23
Campus Union Fee	170.66	170.66	170.66	170.66	170.66	170.66	170.66	170.66
Consolidated Course Fee	31.84	31.84	31.84	31.84	31.84	31.84	31.84	31.84
Health Center Fee	101.88	101.88	101.88	101.88	101.88	101.88	101.88	101.88
Health Facilities Fee	3.81	3.81	3.81	3.81	3.81	3.81	3.81	3.81
Instructionally Related Activities Fee	45.85	45.85	45.85	45.85	45.85	45.85	45.85	45.85
Student ID Card Fee	5.09	5.09	5.09	5.09	5.09	5.09	5.09	5.09
TITAN Participation Fee	8.91	8.91	8.91	8.91	8.91	8.91	8.91	8.91
Tuition and Campus-Based Fees	2,458.81	3,736.81	2,743.81	4,225.81	2,902.81	4,498.81	6,967.81	8,788.81

https://sbs.fullerton.edu/documents/2024%20Fall%20Registration%20Fees.pdf

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THE IMPACT
how IRA enriches a student's experience

Participation often involves collaborative projects, community engagement, and close interactions with faculty and peers. These experiences help students develop a stronger sense of belonging, which is crucial for retention and overall well-being.

84% of study abroad alumni felt their studies abroad helped them build valuable skills for the job market. A second study confirms this at 85%.

High-impact practices contribute to both academic and personal growth by pushing students out of their comfort zones and challenging them to apply their knowledge in practical settings. This holistic development supports not only retention but also prepares students for life beyond college.

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THANK YOU IN ADVANCE
you are appreciated!

To faculty leading IRA programs
Thank you for your proposal and for your investment in our students! We also appreciate that you are proactive in sharing complete information with college staff so they can meet objectives and deadlines.

Please pay close attention to average turnaround times for various transactions (e.g. a purchase order with a new vendor can take 5 weeks). Each IRA info session includes turnaround times for transactions.

To staff and others in the college supporting the administrative aspects of running an IRA program
Thank you in advance for making IRA a priority and for everything you do each day that contributes to student and faculty success!

To department chairs, associate deans, and deans
Thank you for creating an environment that encourages innovation and creativity. Your leadership and oversight are appreciated!

IDEAL PRACTICE DURING THE APPLICATION PROCESS
comprehensive review of programs in the college

01
Comprehensive review at department and college levels

02
How many programs and what are the resource requirements?

03
Does the department/ college have sufficient resources?

04
What is my plan? What are my options?
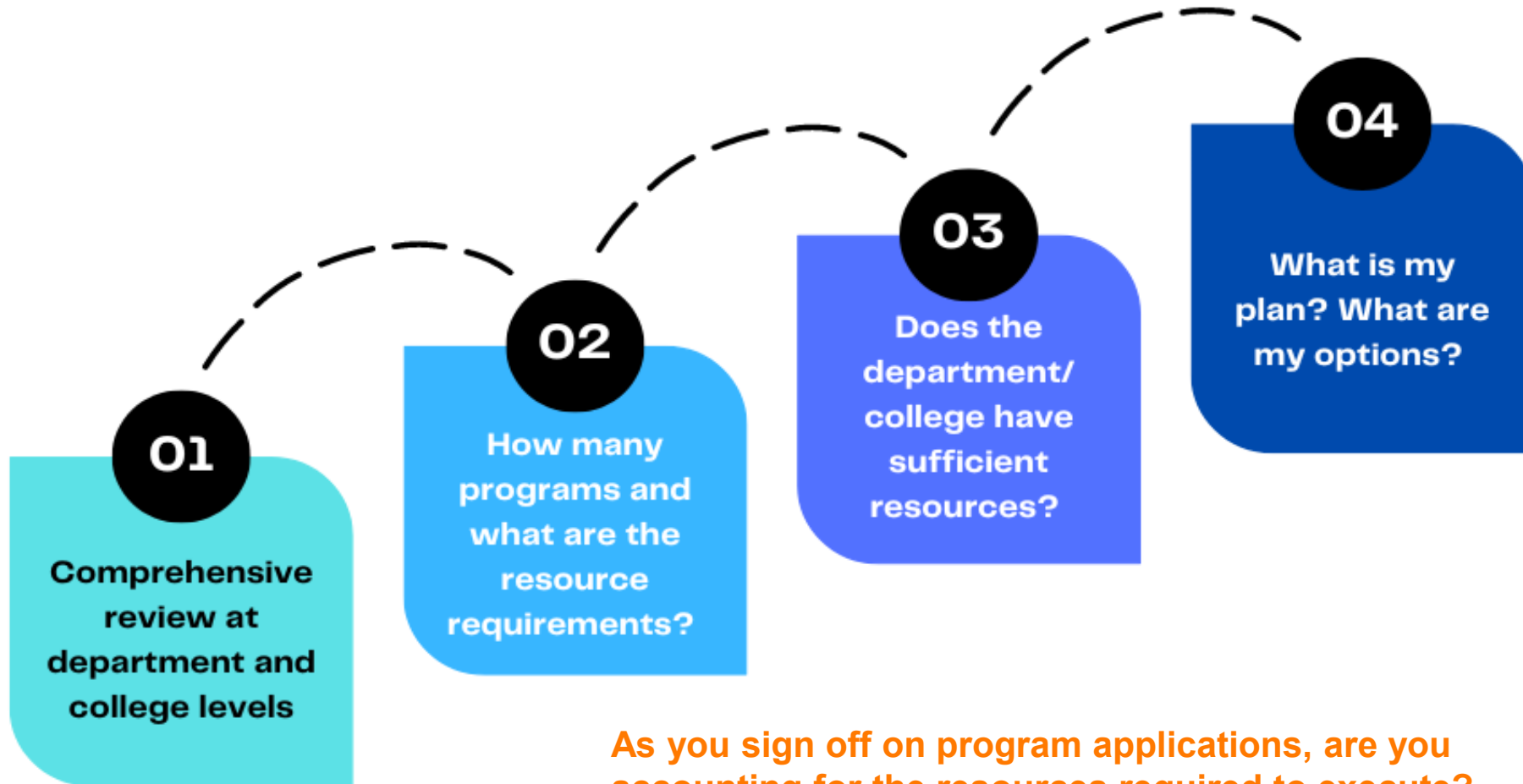
As you sign off on program applications, are you accounting for the resources required to execute?

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IRA Reminders & Timeline

Natalie Azzouni, Committee Oversight Analyst, Student Affairs

Alisa Flowers, Interim Chief of Operations, Student Affairs

IMPORTANT DATES & DEADLINES

- Applications for 2025-26 are now open! Deadline is Sunday **September 22nd**, 11:59pm
- App link: <u>IRA InfoReady Application, 2025-26</u>
  - Funding Orientation must be completed *before* submitting the Application
    - Online orientation through Titan Training Hub (previously ETC)

- Award notices for 25-26 will be sent in Spring 2025 for programs that will receive funding
  - Post-Awards Orientation **must be completed** in order to use funds

- Final Reports due **July 31st 2025** for 2024-25 IRA programs
  - Summary of spent funds & program impact
  - **Must be completed** in order to be considered for future funding
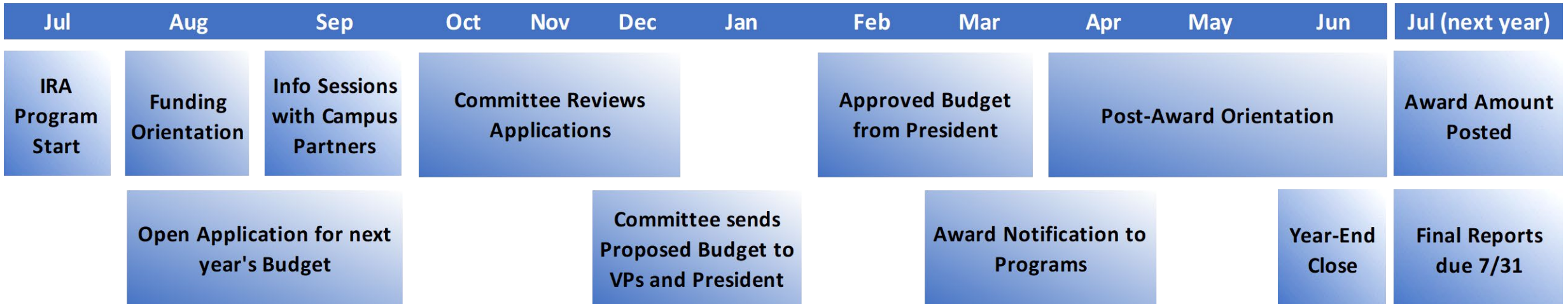
IRA USE OF FUNDS

IRA funds cannot be used for the following:

- Athletics grants

- Purchase or rental of films as instructional aids

- Publications designed primarily to inform or entertain (other than periodic newspaper and laboratory experiences related to journalism and literary training)

- Non-recurring maintenance and repair and capital improvement projects

- Faculty and professional staff salaries and other forms of compensation normally funded through the University's instructional program

- IRA **will not** directly reimburse students for instructionally related activities expenses

- IRA will not reimburse faculty/staff for payments made to vendors for services performed or goods purchased where CSUF is obligated to report such payment to the IRS on form 1099

RESOURCES

IRA Website: https://financialservices.fullerton.edu/ira/

CONTACT

For questions regarding:

- InfoReady Application Process
- Orientations
- Committee meeting information
- Final Reports
- Program changes
- Other IRA questions

Email: IRAFunding@Fullerton.edu

INTERNAL FINANCIAL CONTROLS

Internal financial controls are the systems and processes put in place to ensure that money is handled properly. These controls help make sure that the university's funds are used as intended, that financial records are accurate, and that the risk of fraud or errors is minimized.
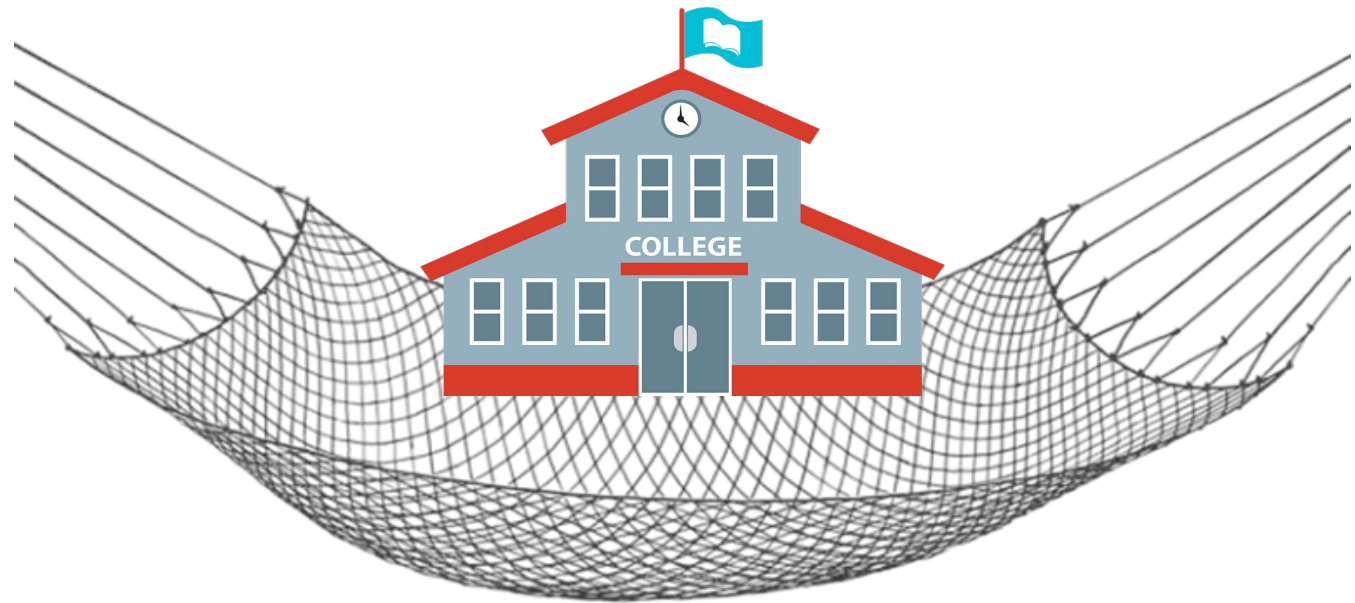
In short, internal financial controls are like a safety net that helps the university manage its money wisely, maintain trust, and avoid financial problems.

INTERNAL FINANCIAL CONTROLS
some best practices

These controls work together to create a system that ensures the financial health and integrity of the university.

- Ensure your college/department is set up with **sufficient oversight** and that all transactions adhere to State, CSU, and CSUF policies and procedures.

- Establish **separation of duties** or different people responsible for different parts of a financial transaction. However, to ensure a comprehensive understanding of budget and expenses, the approving authority should be the **same across all fund types**, including auxiliary and philanthropic accounts.

- **Monitor the budget and review expenditures** by conducting regular (monthly) reviews of budget-to-actuals reports and promptly investigating and following up on any significant differences or questionable expenditures and discrepancies. The standard report utilized at CSUF is the Rev/Expense Summary Report.

- Remain **agile and prepared to pivot**. Be mindful of changes in conditions and your environment that may impact programs.

WHO IS RESPONSIBLE FOR WHAT?
an example and best practice for running IRA financial reports & conducting regular reviews

Reviewer 1

This is often a budget/admin analyst or other staff position

+

Reviewer 2

This is often the Program Lead or a Department Chair

→

Approver/ Decision Maker

The individual with delegation of authority: VP, Dean, Associate Dean, ARM, Designated MPP

Reviewer 1:
runs the report and conducts review; reports any issues or discrepancies to reviewer 2; follows up with the appropriate office at the direction of the approver/decision-maker

Reviewer 2:
conducts a second review; forms a recommendation or action plan to take to the approver/decision-maker (e.g. recommendation to process a budget transfer to clear a deficit)

Approver/Decision Maker:
A final decision is made by the approver or individual with delegation of authority

WHO IS RESPONSIBLE FOR WHAT?
an example and best practice for the review and approval of IRA expenses/transactions

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WHAT TO REVIEW

- Understand the nature or business purpose of the expense, that it is reasonable/necessary, and ensure supporting documentation is complete.

- Ensure the transaction is allowable and complies with all applicable guidelines and policies.

- Verify that the expense/purchase is utilizing the correct funding source.

- Ensure adequate funds are available to cover the expense/purchase and, if a multi-year commitment, that budget plans are fiscally sound and sustainable.

- Approvers ensure reviewers are conducting thorough reviews and have discrepancies corrected prior to the transaction moving to you for approval.

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RESOURCES

CSUF Campus Policies and Procedures

- [Resource Planning and Budget](#)
- [Contracts and Procurement](#)
- [Accounts Payable (travel, check requests, invoices, hospitality)](#)

CSU-Systemwide Policies and Procedures (most applicable)

- [CSU Contracts and Procurement](#)
- [CSU Hospitality Policy](#)
- [CSU Travel and Business Expense Payments](#)

CONTACTS AND SUPPORT

If you have questions or need support, start with your internal administrative support team in your college.

Questions that cannot be addressed within the college or requests for a *program review** should be directed to **IRAfunding@fullerton.edu.**

* a review of the program to identify ways to streamline or improve existing processes

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