HUMBOLDT STATE UNIVERSITY

INSTRUCTIONALLY RELATED ACTIVITIES

2019-20

Budget, Policies, and Procedures
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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.

(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.

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.

(Amended by Stats. 2001, Ch. 734, Sec. 69. Effective October 11, 2001. Section is conditionally operative by its own provisions.)
Category II fees are campus mandatory fees that must be paid to enroll in or attend the university.

- HSU has the 3rd highest campus mandatory fees in the CSU system
  - HSU had the 2nd highest back in 2012-13, in recent years has had the 5th highest – climbed to third highest after recent increases to Student Body Center Fee and Health Fees
- HSU has the highest IRA Fee
- HSU has the 2nd highest Health Services Fee and Health Facilities Fee
- HSU has the 3rd highest Materials, Services, and Facilities (MSF) Fee
- HSU does not have a Student Success Fee – 12 CSU campuses do, although HSU’s MSF Fee does have some similarities
- The only built in annual fee increases are for the Health Services Fee and Health Facilities Fee, which increase by MMI (Milliman Medical Index – inflationary index specific to healthcare), and the MSF Fee, which increases by HEPI (Higher Education Price Index - inflationary index specific to higher education). The increases must be justified to maintain services.

**HSU Tuition and Fee Information:** [https://www2.humboldt.edu/financialservices/node/44](https://www2.humboldt.edu/financialservices/node/44)

**CSU System Fee Rates:** [https://www2.calstate.edu/attend/paying-for-college/csu-costs/tuition-and-fees/campus-mandatory-fees](https://www2.calstate.edu/attend/paying-for-college/csu-costs/tuition-and-fees/campus-mandatory-fees)

**CSU System Fee Policy Information:** [http://www.calstate.edu/budget/student-fees/fee-policy/](http://www.calstate.edu/budget/student-fees/fee-policy/)
The IRA Fee provides funding for Intercollegiate Athletics, the Humboldt Energy Independence Fund (HEIF), the IRA Committee and the Jack Pass.

- Intercollegiate Athletics uses this funding, along with donations, ticket sales, concessions, etc., to cover sports program costs.
- HEIF funds are used for student-driven projects to help reduce the environmental impact of HSU's energy use.
- The IRA Committee is a committee of the University Senate that provides funding for a variety of instructionally related student activities and programs.
- The Jack Pass allows students to ride on public transportation by simply showing their current student ID card.

![2019-20 IRA Fee Rate Distribution: $674](image)

![2019-20 IRA Fee Budget: $4,271,000](image)

Athletics IRA Fee Detail:

- The IRA Fee supports approximately 75% of Athletics operating costs (e.g. personnel costs, team travel, equipment).
- The Admin department consists of Athletics’ administrative costs (e.g. director, public information, marketing, admin support, and centrally managed costs that support all sports such as trainers, equipment managers, conference fees).

![2019-20 IRA Fee Rate Distribution by Sport](image)

![2019-20 IRA Expenditure Budget Distribution by Sport](image)

The Materials, Services, and Facilities (MSF) fee supports supplemental instruction material above the basic classroom level to enhance learning experience for students. The MSF Fee is distributed to the three academic colleges, with 50%
allocated to the College of Natural Resources and Sciences (CNRS), 25% to the College of Arts, Humanities, and Social Sciences (CAHSS), and 25% to the College of Professional Studies.

A few examples of activities supported by this fee: field trips under $50, the CNRS core facility, the Marine Lab, and previously charged course fees (e.g. lab fees, art supplies).

![Pie chart showing 2019-20 MSF Fee Rate Distribution: $348]

![Pie chart showing 2019-20 MSF Fee Budget: $2,189,000]

The Health Services Fee, also referred to as the Student Health Fee, supports the operation of on-campus student health and counseling services. This service is available and provided for all students even if they have private health insurance. The annual fee rate for the Student Health Fee in 2019-20 is $666, reflecting the second year of an approved fee increase after an alternate consultation process and a Student Fee Advisory Committee (SFAC) recommendation in spring 2018 to increase the fee over the two years. The charts on the right reflects the current percent distribution of the overall Health and Wellbeing Services budget between Student Medical Services, Counseling and Psychological Services, and Health Education. In addition, Health and Wellbeing Services received $1,218,149 in support in the 2019-20 budget from the University’s Operating Fund.

The Health Facilities Fee provides funds for the repair and maintenance of the University Health Center building and equipment. The current fee is $66 per year, reflecting an approved fee increase after an alternate consultation process and a Student Fee Advisory Committee (SFAC) recommendation in spring 2018 to increase the fee over the next four years. Of the $426,000 this fee generates, a portion covers system/state overhead costs and the remaining revenue supports facility related maintenance and repairs.

The Student Body Association Fee is budgeted in the Associated Students auxiliary organization. These resources are used to provide services and activities for HSU students. The annual fee rate is $117, which generates approximately $752,000. 100% of the fee supports AS related activities.
The Student Body Center Fee, also referred to as the Campus Union Fee, is used to manage the student center and to make debt service payments on the bond that covered the construction costs of the campus union and recreation center buildings. The annual Student Body Center Fee is $246, reflecting an approved fee increase after a student referendum and Student Fee Advisory Committee (SFAC) recommendation in spring 2019 to increase the fee over the next two years. There is no exact split for this fee - after debt service and system/state overhead charges are covered, the remaining balance is distributed to the University Center (UC) to support the Campus Union and other student related activities.
Instructionally Related Activities (IRA) Fee

Subject: Reserve Policy

Purpose: To provide a guideline for the expenditure and annual review of the IRA Reserve fund level for adequacy.

New/Revised: May 4, 2009

I. Fund Designation

The IRA Reserve is the “savings account” for IRA Programs to be used to address contingencies, emergencies, budgetary impacts such as an unanticipated shortfall in projected enrollment, and other non-routine expenditures.

Appropriations to Reserves – Excess student fee revenues and unspent budget allocation.

The IRA Committee shall review all requests for expenditures. Approval by a majority of the IRA Committee shall be required for approval and recommendation to the University President.

Allocations from the IRA reserves shall also require approval of the University President.

II. IRA Reserve Balance

It is the intention that IRA fees be expended in the year in which they are collected and that large reserves are not accumulated. It is the goal of the IRA Committee that the balance in the IRA reserve should be approximately 10% of the total projected budget amount available for allocation. Annually, at the first meeting of the fiscal year, the IRA Committee shall review its reserve policy and funding levels for adequacy and determine what action, if any, needs to occur.

NOTE: The current balance in the IRA trust account is approximately $300,000. No more than 30% of the IRA Reserve shall be expended within a single year to meet the 10% goal. It is projected that it could take up to 5 years to spend the reserve down to meet this goal. This requirement may be amended by a two-thirds (2/3) majority of the IRA Committee.

May 4, 2009
TO: President Rossbacher, Vice President Dawes and Interim Vice President Brumfield

FROM: Jazmin Sandoval, 2018-19 Associated Students (AS) President

DATE: May 2, 2019

Re: Instructionally Related Activities (IRA) Recommended Budget for 2019-20

Enclosed for your approval is the 2019-20 Instructionally Related Activities (IRA) budget as recommended by the IRA Committee.

This budget is based on our current student fee structure which is $64 per student annually ($32 per semester). Also included in the budget is an allocation from the IRA Reserve amount of $80,127. The June 30, 2019, projected reserve balance is $267,090; the IRA Committee is intentionally spending it down, per the current IRA Reserve Policy. Based on an annualized headcount projection of 7,021 fee-paying students, the total IRA budget for the year is $521,127.

<table>
<thead>
<tr>
<th>Total Revenue Available</th>
<th>$521,127</th>
</tr>
</thead>
<tbody>
<tr>
<td>total request for 2019-20</td>
<td>$606,562</td>
</tr>
<tr>
<td>Projected reserves</td>
<td>$267,090</td>
</tr>
<tr>
<td>Projected Fee Revenue</td>
<td>$441,000</td>
</tr>
<tr>
<td>Reserves available (30%)</td>
<td>$80,127</td>
</tr>
</tbody>
</table>

Due to declining enrollment, the IRA Committee was not able to fund everything at the levels they would have liked. Difficult decisions had to be made and there was much discussion regarding the purpose of IRA funds. The IRA Committee has a few suggestions regarding 2020-2021 allocations:

- Better define ‘instruction’
- Discontinue IRA funding to programs that are not instructionally related
- Better promote the IRA application process so more programs take the opportunity to request funds, leading to a more fair, equitable opportunity across campus
- Reevaluate IRA funding for Sports Clubs and Athletics, per the Student Fee Task Force recommendations
- Evaluate whether or not voting members be allowed to submit funding proposals

The IRA Committee also emphasized that while they value and support funding for areas like Oh SNAP!, Marching Lumberjacks, Sports Clubs, agreed that IRA is not the most appropriate funding source for these programs. The committee allocated funding to these areas for
2019-20, but the committee is recommending it be the final year of IRA funding for programs that do not directly support instruction.

We look forward to your approval of the Associated Students 2019-20 budget. If you have any questions, please contact Jenessa Lund, AS Executive Director, Jenessa.Lund@humboldt.edu or x5410.

Sincerely,

Jazmin Sandoval
2018-19 Associated Students President

cc: Jenessa Lund, AS Executive Director

Recommend Approval:

Wayne Brumfield 5-8-2019
Interim Vice President of Student Affairs

Doug Dawes 5/13/19
Vice President of Administrative Affairs

Approved:

Lisa Rossbacher 5.13.19
President

* Please see attached memo.
## 2019-2020 IRA Committee Budget

<table>
<thead>
<tr>
<th>Program / Activity</th>
<th>18-19 Approved Budget</th>
<th>19-20 Requested Budget</th>
<th>REVISED 19-20 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Art Galleries</td>
<td>$22,422</td>
<td>$33,028</td>
<td>$22,620</td>
</tr>
<tr>
<td>Broadcast Workshop</td>
<td>$1,500</td>
<td>$1,500</td>
<td>$1,500</td>
</tr>
<tr>
<td>CCAT</td>
<td>$2,700</td>
<td>$3,100</td>
<td>$3,100</td>
</tr>
<tr>
<td>CHECK-IT (aka Campus Sexual Assault Prevention Program)</td>
<td>$11,876</td>
<td>$11,876</td>
<td>$11,876</td>
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<tr>
<td>El Leñador</td>
<td>$8,100</td>
<td>$9,500</td>
<td>$9,500</td>
</tr>
<tr>
<td>Enhancing Hands-On Learning</td>
<td>0</td>
<td>$5,400</td>
<td>$5,400</td>
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<tr>
<td>Forensics (Intercollegiate Speech and Debate)</td>
<td>$26,513</td>
<td>$34,648</td>
<td>$34,648</td>
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<td>Forestry Conclave</td>
<td>$25,971</td>
<td>$28,726</td>
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<td>IRA Admin Contract</td>
<td>$28,860</td>
<td>$26,460</td>
<td>$24,420</td>
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<td>KRFH Radio Workshop</td>
<td>$9,000</td>
<td>$10,000</td>
<td>$10,000</td>
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<tr>
<td>Leadership in Volunteer Organizations (YES)</td>
<td>$5,208</td>
<td>$6,610</td>
<td>$0</td>
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<tr>
<td>Lumberjack Newspaper</td>
<td>$25,600</td>
<td>$27,000</td>
<td>$25,600</td>
</tr>
<tr>
<td>Marching Lumberjacks</td>
<td>$12,440</td>
<td>$21,550</td>
<td>$7,440</td>
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<tr>
<td>Master Diver</td>
<td>$8,963</td>
<td>$8,963</td>
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<tr>
<td>Mathematical Contest in Modeling</td>
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<td>$600</td>
<td>0</td>
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<td>Mid - Pacific Conference</td>
<td>$4,410</td>
<td>$4,410</td>
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<tr>
<td>Model United Nations</td>
<td>$19,320</td>
<td>$24,150</td>
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<td>Modern Hispanic Theater Workshop</td>
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<tr>
<td>Moot Court</td>
<td>$4,320</td>
<td>$3,940</td>
<td>0</td>
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<tr>
<td>Music</td>
<td>$96,694</td>
<td>$50,276</td>
<td>$75,000</td>
</tr>
<tr>
<td>Oh SNAP! Student Food Programs</td>
<td>$20,000</td>
<td>$20,000</td>
<td>$20,000</td>
</tr>
<tr>
<td>Osprey</td>
<td>$8,400</td>
<td>$10,000</td>
<td>$10,000</td>
</tr>
<tr>
<td>Outdoor Leadership</td>
<td>$12,983</td>
<td>$14,295</td>
<td>$12,983</td>
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<tr>
<td>Range Plant Identification Team</td>
<td>$4,914</td>
<td>$5,774</td>
<td>$5,774</td>
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<tr>
<td>SAF Quiz Bowl</td>
<td>$3,000</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Scientific Diving</td>
<td>$8,963</td>
<td>$8,963</td>
<td>$8,963</td>
</tr>
<tr>
<td>SDRC Psycho Educational Evaluation Clinic (aka Hidden Disabilities Eligibility)</td>
<td>0</td>
<td>$3,200</td>
<td>0</td>
</tr>
<tr>
<td>Social Identity Lab/Class Data Collection</td>
<td>0</td>
<td>$1,000</td>
<td>0</td>
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<tr>
<td>Social Work Legislative Advocacy Days</td>
<td>$6,676</td>
<td>$9,880</td>
<td>$6,676</td>
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<tr>
<td>Solar Decathlon (aka Race to Zero)</td>
<td>$3,400</td>
<td>$3,400</td>
<td>$3,400</td>
</tr>
<tr>
<td>Sport Clubs</td>
<td>$53,500</td>
<td>$53,500</td>
<td>$47,280</td>
</tr>
<tr>
<td>Textbooks on Reserve</td>
<td>$7,500</td>
<td>$7,500</td>
<td>0</td>
</tr>
<tr>
<td>The World 'The way we saw it'</td>
<td>$2,220</td>
<td>$2,220</td>
<td>0</td>
</tr>
<tr>
<td>Theatre, Film &amp; Dance</td>
<td>$89,720</td>
<td>$89,620</td>
<td>$84,830</td>
</tr>
<tr>
<td>Toyon Literary Magazine</td>
<td>$3,600</td>
<td>$3,600</td>
<td>$3,600</td>
</tr>
<tr>
<td>TV News Workshop</td>
<td>$2,500</td>
<td>$2,500</td>
<td>$2,500</td>
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<tr>
<td>Unallocated</td>
<td>0</td>
<td>$10,000</td>
<td>0</td>
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<tr>
<td>Wildlife Conclave</td>
<td>$20,817</td>
<td>$16,973</td>
<td>$16,973</td>
</tr>
</tbody>
</table>

**Total Revenue Available**: $562,090  
**Projected Reserves for 7-1-20**: $124,557  

### May 2019

- **Total Revenue Available**: $521,127  
  - **Projected reserves**: $267,090  
  - **Projected Fee Revenue**: $441,000  
  - **Reserves available (30%)**: $80,127

### August 2019

- **Total Revenue Available**: $476,811  
  - **Reserves as of 7-1-19**: $232,704  
  - **Projected Fee Revenue**: $407,000  
  - **Reserves available (30%)**: $69,811  

**Projected Reserves for 7-1-20**: $124,557

- $108,147
I approve the recommended budget for Instructionally Related Activities in 2019-20, as indicated by my signature on the attached document. In approving this, I would also like to note three issues of concern.

1) In several cases, the proposed budget indicates a plan for next year to abruptly cut off funding for activities and programs that have been funded by IRA fees for many years. Unless the IRA Committee has determined that the activity has no merit and should be discontinued, I strongly encourage the Committee to work collaboratively with the University to plan a smooth (and probably multi-year) transition to other funding sources that have been identified as more appropriate. If the IRA Committee were to suddenly stop funding programs, the University may not be in a position to take over support for them. Coordinated advanced planning will be critical in determining the best ways to support students.

2) The IRA Committee's plan to "better define 'instruction'" needs to be broad conversation with many perspectives included. I encourage the Committee to ensure that, when this conversation happens, the voices at the table are broadly inclusive.

3) A number of members of the University community have expressed their concern about the voting members of the IRA Committee who submit – and advocate openly for – funding requests for their own programs. This appears to be a conflict of interest, and the question has been raised about the fairness of the process. The high correlation between serving on the IRA Committee and successful requests for funding raises issues of appearance,
and perhaps of substance as well. I encourage the IRA Committee to consider this question in future planning and budgeting.

Please keep this memo with the budget planning materials so that these issues are part of the discussions in developing recommendations for 2020-21.

Thank you for your thoughtful work and stewardship of IRA fee revenue on behalf of the students of Humboldt State University.
<table>
<thead>
<tr>
<th>Program Name</th>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
<th>Account # -- Line Item Name</th>
<th>2018-19 Budget</th>
<th>2019-20 Request</th>
<th>2019-20 Approved Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Art Galleries</strong></td>
<td>TO140</td>
<td>D20023</td>
<td>P0054</td>
<td>660003 - SUPPLIES AND SERVICES</td>
<td>$22,422</td>
<td>$33,028</td>
<td>$22,620</td>
</tr>
<tr>
<td><strong>BUDGET LANGUAGE:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Funds for supplies and services for student-produced exhibitions, including shipping, transportation, exhibit rental fees, materials, production and graphic services.</td>
<td></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td><strong>Broadcast News</strong></td>
<td>TO140</td>
<td>D20026</td>
<td>P0063</td>
<td>660003 - SUPPLIES AND SERVICES</td>
<td>$1,500</td>
<td>$1,500</td>
<td>$1,500</td>
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<tr>
<td><strong>BUDGET LANGUAGE:</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Funds for supplies and services for course productions.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>CCAT</strong></td>
<td>TO140</td>
<td>D40004</td>
<td>P5106</td>
<td>660003 - SUPPLIES AND SERVICES</td>
<td>$2,700</td>
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<td>$3,100</td>
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<td><strong>BUDGET LANGUAGE:</strong></td>
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<tr>
<td>Funds for supplies and services for course projects ($1600 for ENST123 = 4 classes @$200 each; $1500 for ENGR305 = up to six groups for one semester)</td>
<td></td>
<td></td>
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<tr>
<td><strong>CHECK IT</strong></td>
<td>TO140</td>
<td>D40067</td>
<td>P0114</td>
<td>660003 - SUPPLIES AND SERVICES</td>
<td>$11,876</td>
<td>$11,876</td>
<td>$11,876</td>
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<tr>
<td><strong>BUDGET LANGUAGE:</strong></td>
<td></td>
<td></td>
<td></td>
<td>660017 - ADVERTISING &amp; PROMO PUBLICATION</td>
<td>$4,876</td>
<td></td>
<td>$7,000</td>
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<tr>
<td>Funds will be used to promote and provide outreach for the CHECK IT campaign as it relates to course projects.</td>
<td></td>
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<td></td>
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<tr>
<td><strong>El Leñador</strong></td>
<td>TO140</td>
<td>D20026</td>
<td>P0108</td>
<td>660802 - PUBLICATIONS</td>
<td>$8,100</td>
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<td><strong>BUDGET LANGUAGE:</strong></td>
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</tr>
<tr>
<td>Funds to be used toward the printing costs of the course publication (~$950/issue x 10 issues).</td>
<td></td>
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<tr>
<td><strong>Enhancing Hands-On Learning</strong></td>
<td>TO140</td>
<td>D20062</td>
<td>P0243</td>
<td>660003 - SUPPLIES AND SERVICES</td>
<td>$ -</td>
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<tr>
<td><strong>BUDGET LANGUAGE:</strong></td>
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<td>Funds cover a one-year subscription of Money.net.</td>
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<td>Funds to be used toward per diem ($13,853) and transportation ($13,184) for 8 or 16 students (depending on the event) to participate in debate tournaments in CA, OR and WA. Training and Professional Development funds cover tournament registration fees ($7,611). If fewer students participate each tournament, funds will be reduced proportionately.</td>
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**Budget Language:**

**CA Competition (SLO)**

Funds to be used toward per diem ($3,364) and transportation ($2,700) for 24 students to participate in the Fall Forestry Conclave in CA. If fewer students participate, funds will be reduced proportionately.

**West Region Competition (Flagstaff, AZ)**

Funds to be used toward per diem ($14,400) and transportation ($8,262) for 24 students to participate in the Western Regional Forestry Conclave. If fewer students participate, funds will be reduced proportionately.

**TOTAL $25,971**

**Budget Language:**

Funds for course productions including music system maintenance, supplies, and copyright fees/dues ($8,000); and program guides, flyers, posters and promotional items ($1,000).

**TOTAL $10,000**

**Budget Language:**

Funds to be used toward the printing costs of the course publication (~ 28 issues x 16-20 pages each).

**Funds to be used toward per diem ($14,400) and transportation ($8,262) for 24 students to participate in the Western Regional Forestry Conclave. If fewer students participate, funds will be reduced proportionately.**

**Budget Language:**

Funds to be used toward travel expenses (not to exceed per diem) for the Marching Lumberjacks to participate in parades and festivals across CA, as well as an away basketball game. Program no longer a class; received an exception April, 2017. The IRA Committee declared that 2019-2020 will be the final year for non-course related activities to receive IRA funding.

**Budget Language:**

Funds to be used toward per diem and transportation for 24-32 students to travel to Two Harbors, CA, for training. If fewer students participate, funds will be reduced proportionately.

**Budget Language:**

Funds to be used toward per diem ($2,510) and registration fees ($1,900) for 15 students to participate in the competition in Berkeley, CA. If fewer students participate, funds will be reduced proportionately.
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<thead>
<tr>
<th>Program Name</th>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
<th>Account # -- Line Item Name</th>
<th>2018-19 Budget</th>
<th>2019-20 Request</th>
<th>2019-20 Approved Budget</th>
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<td>Funds to be used toward two Model United Nations events: <strong>Far West</strong> (held in San Francisco) per diem ($6,464) and transportation/parking ($1,710) for 32 students to participate; <strong>New York</strong> per diem ($3,360) and transportation ($3,266) for 8 students to participate. Training and Professional Development cover registration for both events (FW = $3,240 and NY = $1,280). If fewer students participate, funds will be reduced proportionately.</td>
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<td>Workshop</td>
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<td>Funds to be used for supplies, services and publicity associated with the course's culminating performance.</td>
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**BUDGET LANGUAGE:**
After the requests were submitted and before the final budget was approved, the Music Department informed the IRA Committee that the choir tour was reduced (on 4-18-19) and would not require as much funding for 2019-20 (reducing that request from $18,785 to $3100).
<table>
<thead>
<tr>
<th>Program Name</th>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
<th>Account # -- Line Item Name</th>
<th>2018-19 Budget</th>
<th>2019-20 Request</th>
<th>2019-20 Approved Budget</th>
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<td>Oh Snap! Campus Food Security</td>
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<td>$20,000</td>
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<tr>
<td>These funds are to be used to purchase food for the HSU Food Security Program Food Cupboard. The committee recommends these funds are allocated from another source in the future as this request is outside of the current IRA funding guidelines. Due to the high need for students, the IRA Committee voted to issue an exception and allocate funding for food for students in 2019-20.</td>
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</table>

| Osprey                        | TO140 | D20026| P0056    |                             | $8,400         | $10,000         | $10,000                  |
| BUDGET LANGUAGE:              |       |       |          |                             | $8,400         | $10,000         | $10,000                  |
| Funds to be used toward the printing costs of the course publication (~3000 copies x 2 issues). |

| Outdoor Leadership Assistantship | TO140 | D20064| P0403    |                             | $12,983        | $14,295         | $12,983                  |
| BUDGET LANGUAGE:                |       |       |          |                             | $12,983        | $14,295         | $12,983                  |
| Funds to be used toward outdoor expedition training as associated with the course. Travel funds include per diem and transportation; supplies and services include maps, SPOT and satellite phone subscription. |

| Solar Decathlon (aka Race to 2) | TO140 | D20045| P0112    |                             | $3,400         | $3,400          | $3,400                   |
| BUDGET LANGUAGE:                |       |       |          |                             | $3,400         | $3,400          | $3,400                   |
| Funds to be used for per diem ($1,400) and transportation ($2,000) for four students to travel to Golden, CO, to participate in a national low-energy building design competition. If fewer students participate, funds will be reduced proportionately. |

| Range Plant ID Team            | TO140 | D20047| P0067    |                             | $4,914         | $5,774          | $5,774                   |
| BUDGET LANGUAGE:               |       |       |          |                             | $4,914         | $5,774          | $5,774                   |
| Funds to be used toward per diem ($2,175) and transportation ($3,180) for 8 students to participate on the Range Plant ID Team and URM Exam competitions in Denver, CO. Training and Professional Development funds go toward registration fees. If fewer students participate, funds will be reduced proportionately. |

| Scientific Diving/Reef Check   | TO140 | D20064| P0400    |                             | $8,963         | $8,963          | $8,963                   |
| BUDGET LANGUAGE:               |       |       |          |                             | $8,963         | $8,963          | $8,963                   |
| Funds to be used toward per diem and transportation for 24-32 students to travel to Two Harbors, CA, for training. If fewer students |

<p>| Social Work Advocacy Days      | TO140 | D20038| P0395    |                             | $6,676         | $9,880          | $6,676                   |
| BUDGET LANGUAGE:               |       |       |          |                             | $6,676         | $9,880          | $6,676                   |
| Funds to be used toward per diem ($2,025) and transportation ($2,200) for 25 students to travel to Sacramento, CA. Training and Professional Development funds cover the NASW registration fees. If fewer students participate, funds will be reduced proportionately. |</p>
<table>
<thead>
<tr>
<th>Program Name</th>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
<th>Account # -- Line Item Name</th>
<th>2018-19 Budget</th>
<th>2019-20 Request</th>
<th>2019-20 Approved Budget</th>
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<td></td>
<td>Travel funds to go toward 15 sport clubs traveling over two semesters. Training and Professional Development funds cover league and tournament dues/fees. Program no longer a class; received an exception October 2012.</td>
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<td>26 Theatre, Film and Dance</td>
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<td>Humboldt International Film Festival (HIFF)</td>
<td>TO140</td>
<td>D20031</td>
<td>P5112</td>
<td>660017 - ADVERTISING &amp; PROMO PUBLICATION</td>
<td>$2,500</td>
<td>$2,000</td>
<td>$1,893</td>
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<td>BUDGET LANGUAGE:</td>
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<tr>
<td>27 Toyon</td>
<td>TO140</td>
<td>D20024</td>
<td>P0074</td>
<td>660802 - PUBLICATIONS</td>
<td>$3,600</td>
<td>$3,600</td>
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<tr>
<td>28 Wildlife Conclave</td>
<td>TO140</td>
<td>D20057</td>
<td>P0068</td>
<td>606002 - TRAVEL OUT OF STATE</td>
<td>$20,817</td>
<td>$16,973</td>
<td>$16,973</td>
</tr>
<tr>
<td>National Wildlife Society - Reno, NV (Fall 2019)</td>
<td></td>
<td></td>
<td></td>
<td>660009 - TRAINING AND PROF DEVELOPMENT</td>
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<td>Regional Wildlife Society - SLO (Spring 2020)</td>
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<td>606001 - TRAVEL IN STATE</td>
<td>$5,108</td>
<td></td>
<td>$5,108</td>
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<td>660009 - TRAINING AND PROF DEVELOPMENT</td>
<td></td>
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<td>$750</td>
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<td></td>
<td></td>
<td>660003 - SUPPLIES AND SERVICES</td>
<td></td>
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<td>$600</td>
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<td>BUDGET LANGUAGE:</td>
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<td>Funds to be used toward travel for 15 students to participate in the Annual Wildlife Quizbowl (8 nights) in Reno, NV, and the Western Wildlife Students' Conclave in SLO (7 nights). AWQ per diem ($4,100) and transportation ($1,615); WWSC per diem ($3,200) and transportation ($1,908). Training and Professional Development funds cover the registration fees (AWQ = $4,800; WWSC = $750). If fewer students participate, funds will be reduced proportionately.</td>
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16
BUDGET LANGUAGE:
INSTRUCTIONALLY RELATED ACTIVITIES
FUNDING GUIDELINES

The I.R.A. fee was established to provide support for essential educational experiences and activities that aid and supplement the fundamental educational mission of the institution.

Activities eligible for I.R.A. funding are limited to those which:

1. Are discipline / departmentally-based and sponsored.
2. Are integrally related to its formal instructional offerings.
3. Are intensive, structured activities.
4. Reflect active rather than passive student involvement.
5. Are considered to be essential to a quality educational program and an important instructional experience.
6. Demonstrate skills derived from intensive coursework involvement.

The guidelines presented will therefore exclude funding of the following:

- Instructional activities such as field trips, student research projects, course offerings solely tailored to meet I.R.A. requirements, etc.

GENERAL REQUIREMENTS

1. Students must be regularly matriculated, currently enrolled in any H.S.U. course to receive I.R.A. funds. Non-Students will not be funded.
2. Activities (competition and production) to be considered for I.R.A. funding should be the result of a class or classes that are structured with the specific objectives of creating the activity. Exceptions to the course requirement may be made at the discretion of the I.R.A. Committee and approved by the H.S.U. President.
3. National or regional competitions that are contingent on qualifying are not funded in the initial budget process. Funding requests for these additional activities may be submitted to the Associated Students Business Office upon qualifying. The I.R.A. Committee will review these requests at the end of each semester.
4. Activity must occur during the fiscal year for which the funds were allocated. Activities that occur outside of the fiscal year will not be funded.
5. No salaries or wages will be funded.
6. Only actual participation in an activity will be funded.
7. No equipment will be purchased with I.R.A. funds. Definition of equipment: Items over $500 or which last over 2 years.
8. Per Diem: I.R.A. per diem will fund up to $70 for each night away. There is no split identified for per diem. This is the full amount for food and lodging. Faculty will not be funded for per diem trips.
9. Travel: I.R.A. does not have its own travel policy. All I.R.A. trips must follow the H.S.U. Field Trip Policy and use Concur. Your H.S.U. Department Coordinator is responsible for generating the trip requests. Once generated, field trip waiver forms will be created in
your students’ Student Center. They must “sign” the waiver prior to departing on the trip(s).

It is expected that I.R.A. programs will request funds for the most reasonable and economical form of transportation. If the I.R.A. program uses a more expensive form of transportation, it will be reimbursed at the amount required for a less expensive mode of travel.

Vehicles: I.R.A. will fund the rental vehicles and reimbursement for actual gas purchases supported by receipts. You are expected to refuel gas tanks prior to returning rental vehicles to Plant Operations. The vendor usually charges more for fuel. Personal vehicles will only be reimbursed for actual gas expenses supported by receipts and/or not to exceed $.14/ mile.

Bus Driver Program Information: The use of any University bus or 15-passenger van includes a driver provided by Plant Operations. This amount will be included in the chargeback/invoice from Plant Operations and is an allowable I.R.A. expense. Contact Plant Operations for driver hourly rate and mileage rate information.

Occasionally I.R.A. programs may need to hire or charter vehicles from private companies. In these situations, the I.R.A. program has the flexibility to hire vehicles where cost may exceed that of state transportation.

**EVALUATION CRITERIA**

1. Educational benefits of the program
2. Identification of student learning outcomes for participants
3. Benefits to student community
4. Number of students benefiting indirectly
5. Number of students participating
6. Overall cultural value to the University
7. Overall educational value to the University
8. Importance to the University as a whole
9. Ratio of past and current student participants to the program cost
10. Costs in comparison to comparable programs at H.S.U.
11. Willingness to attempt to generate income to help support the activity
12. Appropriateness of I.R.A. Fee support as opposed to General Fund support
13. Maximization of program revenue
14. Other sources of funding received by the program area
15. Innovation and new ideas
16. Continuity
17. Cost/benefit ratio
DEFINITIONS

TRANSPORTATION:
1. Car rental, bus / driver rental, charter bus, train, gas
2. Airline tickets
4. Parking, tolls

PER DIEM:
1. $70 per student per night out for food and lodging - There is no split identified for per diem.
   Maximum amount per student per trip is $1,100.

SUPPLIES AND SERVICES:
1. Supplies that support the I.R.A. activity and whose useful life is limited primarily to the activity itself (i.e. sheet music, film, production, programs, costumes, props).
2. Printing of brochures, programs, publications, posters, announcements, newspaper.
3. Applicable individual fees required in order to participate in an I.R.A. event/program (i.e. individual insurance premiums, individual fees).
4. No equipment will be purchased with I.R.A. funds. Definition of equipment: Items over $500 or which last over 2 years.

REGISTRATION:
1. Conference, Conclave, Competition, Team, School fees.

PUBLICITY:
1. Photocopying, costs for designing and printing brochures, posters, flyers, forms, and other materials related to the specific promotion of the class activity.
The Associated Students of H.S.U. is the campus agency designated with the responsibility for handling financial and accounting transactions for Instructionally Related Activities fee based programs. That responsibility requires following accounting standards and acceptable business practices that will hold up through an audit of the organization’s records. Providing proper documentation for all transactions made through the Associated Students is a standard that cannot be compromised.

All groups that receive funds from the Instructionally Related Activities fee are responsible for maintaining a record keeping system. It is your responsibility to verify your records with Oracle Business Intelligence (OBI). If there is a discrepancy, contact the A.S. Business Office at x3771 as soon as possible.

In order to submit Payment Requests, etc., the faculty/staff advisor MUST have a current "Signature Authority Form" on file. Account balance and transactions can be reviewed in OBI. If a Budget Administrator is added or deleted, the "Signature Authority Form" must be updated. "Signature Authority Forms" are available here: https://www.humboldt.edu/forms/node/537.

**EXPENDITURES**

**GENERAL GUIDELINES**

In compliance with the Chancellor’s Office and generally accepted accounting practices, documentation of transactions is required to support all "Payment Requests" (See page 24). The following guidelines are established to clarify this requirement as it applies to I.R.A.

*It is important that you read and understand the budget language for your I.R.A. program.* All requests for expenditures must adhere to your program’s approved I.R.A. Budget Language. Expenditure of I.R.A. funds requires that there are sufficient funds in your account, and that the payment request is properly completed. Checks will not be available as scheduled if the Payment Requests are not properly completed. The A.S. Business Office will attempt to notify you of any errors. Checks will be available any time after Tuesday or Thursday after 3pm. The process may take a few days to complete.

If you have any questions regarding expenditures, do not hesitate to call the A.S. Business Office at x3771.
ACCEPTABLE DOCUMENTATION

1. Vendor invoices which detail the merchandise purchased or services rendered
2. Signed and dated contracts on business letterhead specifically stating services rendered
3. Detailed receipts which describe purchase or services rendered and reflect amount paid
4. For personal car fuel reimbursement ($0.14/mile), a Google map indicating trip mileage
5. On-line purchases must have a shipping confirmation as part of documentation.
6. For conference or event registration fees, a memo from the sponsoring organization can be accepted, in lieu of an itemized receipt, if it contains all of the following:
   a. on letterhead of sponsoring organization
   b. amount of fees received
   c. name and date of event for which the fees were paid
   d. name of person (if applicable) paying the fees
   e. signature, printed name and phone number of person receiving the fees

UNACCEPTABLE DOCUMENTATION

1. Vendor’s monthly statement - it only shows a summary of all the invoice numbers. It is not acceptable because (1) it does not provide information on items purchased or services rendered; (2) it is difficult to determine if some or all of the invoices have been previously paid.
2. Canceled checks, copies of canceled checks, personal checks
3. Credit card slips - not acceptable because detail is not shown on items purchased
4. Personal note/memo stating services rendered or items purchased
5. Order forms
6. Purchase Orders
7. Any documents that do not clearly reflect amount paid, item purchased or describe services rendered
8. Copies of receipts or copies of invoices - to ensure that original receipt or invoice has not been previously paid
9. Packing Slips
10. Prepaid gasoline receipts – not acceptable because detail is not shown on items purchased
SALES OR ‘USE’ TAX

Per California state law, purchases made from out-of-state retailers are subject to ‘use’ tax and must be reported. The use tax rate for Arcata is 8.5% (and varies by county) of the purchase price including handling charges. This differs from California sales tax which is 7.25%. Anything purchased from a State that does not have sales tax must include this 8.5% use tax. While the H.S.U. Accounts Payable office will calculate this tax, deduct it from your I.R.A. account, and remit it to the state, it is important that you deduct this tax in your program ledgers.

PAYMENT REQUEST

An example of a "Payment Request" is included in the examples section. Forms are available on the H.S.U. website: https://www.humboldt.edu/forms/node/594

PAYMENT REQUEST REQUIREMENTS

1. All Payment Requests must be submitted with proper receipts or original invoices to the A.S. Business Office in order to be processed (See “Reimbursement Requirements” below if the payment request is to reimburse an individual).
2. When paying a vendor, a separate payment request is needed for each invoice.
3. All Payment requests must include an address for the payee. Payment requests without an address will not be processed. Please list an off campus address.
4. Payee Data Record STD 204 - The Internal Revenue Service requires that payment for certain services (i.e. rent, speeches, graphic services, donations, etc.) to individuals or an unincorporated business be reported on an annual basis. The individuals/businesses which receive payment for services rendered are required to fill out a Payee Data Record STD 204 before their checks can be released. Payee Data Record STD 204 are available online at http://www.humboldt.edu/forms/node/134
5. See the TRAVEL section for additional details on travel expenditures.
6. Payment requests must be signed by the Budget Administrator as the “Approved Project Signer” before payment will be issued. The supervisor of the program director must sign the “One Up” signature space on the form. (For example, the department chair, dean or director.)
7. It is recommended you retain a copy of the payment request for your records.
8. Checks may be picked up at the H.S.U. Cashier’s Office (SBS Building, 2nd floor) or mailed. Please indicate on Payment request if the check is to be mailed or picked up. Checks not picked up after two weeks will be mailed to the address given on the Payment request.
REIMBURSEMENT REQUIREMENTS

1. Requests for payment or a reimbursement to a Program Director and/or Budget Administrator require a “One-Up Signature” for expenditure of any funds. The supervisor of the program director must sign the “One Up” signature space on the form. (For example, the department chair, dean or director.)

2. Requests for reimbursement to an individual must be processed with original supporting documentation attached.

3. The documentation must clearly describe the nature of the expenditure. In other words, non-itemized receipts with just a total of the expense are not allowable documentation.

4. Original supporting documentation must be in the form of an invoice or receipt. Photocopied or faxed invoices/receipts will not be processed for payment.

IMPORTANT NOTE! Please note that there have been changes to the format in which receipts need to be turned in:

1. One receipt amount per line on a payment request.
2. For scanning purposes, receipts must be submitted in a ready-to-scan format. Receipts must be taped in a single layer to a separate sheet(s) of paper. Do not staple receipts or sheet to payment request. Please do not overlap the receipts.
3. Personal items and/or other non-reimbursable items may not be listed on the receipts.

NOTE: Reimbursement payment requests may contain multiple receipts. For payment requests to vendors, however, only process one invoice per payment request. Example: Three invoices from ACE Hardware require three separate Payment requests.

ACCEPTABLE DOCUMENTATION

1. Vendor invoices which detail the merchandise purchased or services rendered
2. Signed and dated contracts on business letterhead specifically stating services rendered
3. Detailed receipts which describe purchase or services rendered and reflect amount paid
4. For personal car fuel reimbursement ($0.14/mile), a Google map indicating trip mileage
5. On-line purchases must have a shipping confirmation as part of documentation
6. For conference or event registration fees, a memo from the sponsoring organization can be accepted, in lieu of an itemized receipt, if it contains all of the following:
   a. on letterhead of sponsoring organization
   b. amount of fees received
   c. name and date of event for which the fees were paid
   d. name of person (if applicable) paying the fees
   e. signature, printed name and phone number of person receiving the fees
UNACCEPTABLE DOCUMENTATION

1. Vendor’s monthly statement - it only shows a summary of all the invoice numbers. It is not acceptable because (1) it does not provide information on items purchased or services rendered; (2) it is difficult to determine if some or all of the invoices have been previously paid.
2. Canceled checks, copies of canceled checks, personal checks
3. Credit card slips - not acceptable because detail is not shown on items purchased
4. Personal note/memo stating services rendered or items purchased
5. Order forms or purchase orders
6. Any documents that do not clearly reflect amount paid, item purchased or describe services rendered
7. Copies of receipts or copies of invoices - to ensure that original receipt or invoice has not been previously paid
8. Packing Slips

I.R.A. FUND DEPOSIT

Deposits are to be delivered to the H.S.U. Cashier’s Office (SBS, 2nd Floor).

Return of I.R.A. Funds, use:

<table>
<thead>
<tr>
<th>Account</th>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chartfield</td>
<td>250002</td>
<td>ZM002</td>
<td>DXXXXX</td>
</tr>
</tbody>
</table>

I.R.A. Funds Misc. Revenue, use:

<table>
<thead>
<tr>
<th>Account</th>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chartfield</td>
<td>250002</td>
<td>ZM002</td>
<td>DXXXXX</td>
</tr>
</tbody>
</table>

If you do not know the department and program number, contact your Department Budget Administrator.
PURCHASES

1. All purchases must be pre-approved by the I.R.A. Committee via the budget approval process (which occurs each spring). Budget language in the I.R.A. Manual will provide some details of which expenditures were approved. Contact the A.S. Business Office (x3771) if you are uncertain whether a specific purchase is allowable.

2. When possible, use a ProCard to make purchases. If you do not have a ProCard, the A.S. Business Office Coordinator has a ProCard solely for TO140. Contact them at x3771 to coordinate the payment.

3. If you use your own ProCard for TO140 purchases, be sure to obtain the A.S. Executive Director's signature each month when reconciling your ProCard.

4. There must be sufficient funds in your account in order to be covered by TO140.

TRAVEL

All I.R.A. trips must comply with all requirements as set forth by the H.S.U. Field Trip Policy and use Concur. **I.R.A. does have two exceptions:** (1) personal vehicle fuel reimbursement rate is $.14/mile; and student per diem (food/lodging) is $70/night.

Travel requirements must be fulfilled prior to any travel advances or reimbursements being issued. Your H.S.U. Department Coordinator can assist you with generating the trip request(s) using Concur.

The most current forms needed for travel are available on the H.S.U. Forms Page.

**Concur Notes:**

1. Indicate in the travel request how many students are planning to travel. When creating the expense report, upload the list of students (and their IDs) who traveled (using the I.R.A. Student Travel Verification Form attached - or something similar). Reimbursement amount may be adjusted if fewer students travel.

2. If cash was distributed to the students, upload the form they signed acknowledging they received that specific amount from the travel leader.

3. Separate the faculty travel from the student travel by using the TO140 chartfield for only the student travel.

If you have any questions regarding this information, please contact Procurement and Risk Management at (707) 826-3312 or the A.S. Business office at (707) 826-3771.
I.R.A. TRAVEL REIMBURSEMENT REQUIREMENTS

I.R.A. programs that travel must seek approval via Concur and then submit the expense report with proper documentation post travel.

**Per diem** is an allotment for meals and lodging for each student who travels. I.R.A. per diem will fund up to **$70 for each night away**.

- There is no split identified for per diem.
- This is the full amount allowable for food and lodging.
- No receipts are required; however, they must sign the roster acknowledging they received a specific amount of cash from the travel leader, if applicable.
- Faculty and coaches will not be funded for per diem on trips.

To determine the total that you may request as an advance, or that will be reimbursed through a Payment Request, multiply $70/Night X Number of Students X Number of Nights.

**Example:**

| Number of Student in Travel Party – 12 (twelve) |
| Leave H.S.U. – 6am Wednesday |
| Return H.S.U. – 9pm Saturday |

(Three nights are spent on this trip – Wednesday, Thursday, and Friday)

Total Per Diem Allowed: 12 students x 3 nights x $70 = 2,520

Requests for per diem greater than this calculation will not be accepted.

Requests for travel reimbursement must be as approved by the Instructionally Related Activities Committee budget language.

Important note regarding air travel: Original airline boarding passes and a detailed itinerary must be submitted with a Payment Request.
INSTRUCTIONALLY RELATED ACTIVITIES
STUDENT TRAVEL VERIFICATION FORM

DATE: _______________  NAME OF PROGRAM: ________________________________

ACCOUNT NUMBER: __________________________________

We the undersigned acknowledge we have received or are eligible to receive $ ____ Per Diem for food and/or lodging (or the equivalent of up to $70.00 per night per diem) for the Instructionally Related Activities event described below:

Event: ________________________________________________________________

Destination: ____________________________________________________________

Departure Date: _____________ Time: ______  Return Date: _____________ Time: ______

PLEASE PRINT LEGIBLE

****The above section must be completed in its entirety for the signature section to be valid****

<table>
<thead>
<tr>
<th>NAME</th>
<th>SIGNATURE</th>
<th>STUDENT ID #</th>
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</table>

For further information regarding per diem, please contact the Associated Students Business Office at 826-3771

**ATTACH ADDITIONAL SHEETS IF NECESSARY**

OFFICE USE ONLY

ACCOUNT NUMBER: ___________________________  Number of Students Verified: ________

REVIEWED BY: ______________________________
**STATE OF CALIFORNIA  HUMBOLDT STATE UNIVERSITY**

**PAYEE DATA RECORD**

**INSTRUCTIONS:** Complete all information on this form. Sign, date, and return to the State agency (department/office) address shown at the bottom of this page. Prompt return of this **fully completed** form will prevent delays when processing payments. Information provided in this form will be used by State agencies to prepare Information Returns (1099). See reverse side for more information and Privacy Statement.

**NOTE:** Governmental entities, federal, State, and local (including school districts), are not required to submit this form.

---

### 1. PAYEE'S LEGAL BUSINESS NAME

**Type or Print**

**SOLE PROPRIETOR** - ENTER NAME AS SHOWN ON SSN (Last, First, M.I.)

**E-MAIL ADDRESS**

**REMITTANCE ADDRESS**

**BUSINESS ADDRESS**

**CITY, STATE, ZIP CODE**

**CITY, STATE, ZIP CODE**

---

**Note:** Payment will not be processed if Sections 3 & 4 are incomplete.

### 3. ENTER FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN):

- **PARTNERSHIP**
- **CORPORATION:**
  - **MEDICAL** (e.g., dentistry, psychotherapy, chiropractic, etc.)
  - **LEGAL** (e.g., attorney services)
  - **EXEMPT** (nonprofit)
  - **ALL OTHERS**

**PLEASE CHECK ALL APPLICABLE**

- Equipment/Supplies
- Rent
- Attorney Fees
- Interest
- Travel reimburse
- Royalties
- Legal Settlement
- Other Income
- Medical Services
- Non-Med Services

### 4. PAYEE RESIDENCY STATUS

- California resident - Qualified to do business in California or maintains a permanent place of business in California.
- California nonresident (see reverse side) - Payments to nonresidents for services may be subject to State income.
- Tax withholding: No services performed in California.
- Copy of Franchise Tax Board waiver of State withholding attached.

- I am A US Citizen
- I Am NOT a US Citizen and I DO NOT have a Permanent Resident Alien Green Card
- Tax Exempt by Tax Treaty
- Country of Residency: [ ]

### 5. CERTIFICATION

**Certification:** My business is certified by the State of California’s Office of Small Business Certification and Resources (OSBCR) as:

- Disabled Veteran Owned Business (51% ownership and 10% service-related disability)
- Small Business
- Cert #

**Preferred Method of Payment**

- Credit Card
- Check
- EFT / ACH - Attach voided check or deposit information on company letterhead.

**I hereby certify under penalty of perjury that the information provided on this document is true and correct. Should my residency status change, I will promptly notify the State agency below.**

**AUTHORIZED PAYEE REPRESENTATIVE’S NAME**

**TITLE**

**SIGNATURE**

**DATE**

**TELEPHONE**

**Please return completed form to:**

Humboldt State University, Accounts Payable
1 Harpst Street  Arcata, CA  95521

Email: accounts payable@humboldt.edu  Tel: (707) 826-3512  Fax: (707)826-3312
### Requirement to Complete Payee Data Record, STD. 204

A completed Payee Data Record, STD. 204, is required for payments to all non-governmental entities and will be kept on file at each State agency. Since each State agency with which you do business must have a separate STD. 204 on file, it is possible for a payee to receive this form from various State agencies.

Payees who do not wish to complete the STD. 204 may elect to not do business with the State. If the payee does not complete the STD. 204 and the required payee data is not otherwise provided, payment may be reduced for federal backup withholding and nonresident State income tax withholding. Amounts reported on Information Returns (1099) are in accordance with the Internal Revenue Code and the California Revenue and Taxation Code.

### Are you a California resident or nonresident?

A corporation will be defined as a "resident" if it has a permanent place of business in California or is qualified through the Secretary of State to do business in California.

A partnership is considered a resident partnership if it has a permanent place of business in California. An estate is a resident if the decedent was a California resident at time of death. A trust is a resident if at least one trustee is a California resident.

For individuals and sole proprietors, the term "resident" includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for a temporary or transitory purpose. Generally, an individual who comes to California for a purpose that will extend over a long or indefinite period will be considered a resident. However, an individual who comes to perform a particular contract of short duration will be considered a nonresident.

Payments to all nonresidents may be subject to withholding. Nonresident payees performing services in California or receiving rent, lease, or royalty payments from property (real or personal) located in California will have 7% of their total payments withheld for State income taxes. However, no withholding is required if total payments to the payee are $1,500 or less for the calendar year.

For information on Nonresident Withholding, contact the Franchise Tax Board at the numbers listed below:

- Withholding Services and Compliance Section: 1-888-792-4900
- For hearing impaired with TDD, call: 1-800-822-6268
- Website: [www.ftb.ca.gov](http://www.ftb.ca.gov)
- E-mail address: wscs.gen@ftb.ca.gov

### Certification

If applicable, please include the Certification Number associated with the type of business.

### Select preferred method of payment.

### Provide the name, title, signature, and telephone number of the individual completing this form. Provide the date the form was completed.

### This section must be completed by the State agency requesting the STD. 204.

### Privacy Statement

Section 7(b) of the Privacy Act of 1974 (Public Law 93-579) requires that any federal, State, or local governmental agency, which requests an individual to disclose their social security account number, shall inform that individual whether that disclosure is mandatory or voluntary, by which statutory or other authority such number is solicited, and what uses will be made of it.

It is mandatory to furnish the information requested. Federal law requires that payment for which the requested information is not provided is subject to federal backup withholding and State law imposes noncompliance penalties of up to $20,000.

You have the right to access records containing your personal information, such as your SSN. To exercise that right, please contact the business services unit or the accounts payable unit of the State agency(ies) with which you transact that business.

All questions should be referred to the requesting State agency listed on the bottom front of this form.
PAYMENT REQUEST FORM
Send Original form to Accounts Payable

□ Check this box to PICK UP CHECK at the CASHIER’S office at the SBS BUILDING, 2nd floor.
Give complete address information for all payments.

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<td>Employee □ Must use campus address</td>
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A Payee Data Form (Form 204) must be completed by the vendor if not currently on file

Date: ____________________________
Payable to: ____________________________ HSU ID: ____________________________
Address: ____________________________ Phone #: ____________________________
Department: ____________________________ Contact: ____________________________ Ext: ____________________________
Total Amount: ____________________________ Project Name: ____________________________

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Explanation: ____________________________

I hereby certify upon my knowledge that the budgeted funds are available for this expenditure, and that this expenditure is in keeping with the designated purpose of this account. By checking the HMSPF box, I further certify that, in the case of payroll advances, this pay period was calculated as above. In the case of travel, I certify that duplicate payment through other accounts has not and will not occur; I certify funds are from non-state sources and within the travel rules allowed by the funder. In the case of grants/contracts, I certify these expenditures took place within the period of performance.

Department Certification/Approved Project Signer

"One Up" Signature (if needed)

Print Name

Print Name

FOR ACCOUNTS PAYABLE USE ONLY

Last Updated: April 14, 2017
Humboldt State Cashier's Receipting Instruction
Return of IRA Funds

Receipt to: 

Please receipt: ______________________ (total amount) into the following accounts:

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Prepared by: ___________________ Department: ___________________ Date: ___________________

Approved by: ___________________ Business Unit: ___________ HMCMC ___________ HMASB ___________ HMADV

Humboldt State Cashier's Receipting Instruction
IRA Funds-Misc Revenue

Receipt to: 

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Prepared by: ___________________ Department: ___________________ Date: ___________________

Approved by: ___________________ Business Unit: ___________________
Introduction

The Task Force on Student Fees was created by the Associated Students and President Rossbacher in spring 2018 with the charge to “Examine mandatory student fees at Humboldt State University, determine whether they are serving the current needs of students, and make recommendations for any future changes.”

At the beginning, the Task Force agreed that its goals were to 1) ensure the student fees are meeting student needs and 2) keep mandatory fees as low as possible to ensure affordability. The group acknowledged that fee increases have been suppressed (or non-existent) for a number of years, although HSU had the fifth highest campus mandatory fees in the California State University. HSU has made a conscious decision to keep student costs as low as possible, but the real costs of services and materials have increased significantly, as have the needs of students. This situation has created a bottleneck, and to maintain the current services, fees need to increase – in some cases, significantly. In addition, student fees have been used to fund salaries and benefits for student and staff employees; as these costs have increased, the fee structure has not included any provision to cover these increases. Thus, the work of this Task Force is particularly timely.

For background, the University Budget Office prepared a summary of Humboldt State’s Mandatory Fees, and this document, dated February 9, 2018, is attached as Appendix A. In addition, to provide context for the Task Force’s discussions, Appendix B is a summary of the 2017-18 tuition and fees for all campuses in the California State University and Appendix C is a 10-year history of HSU’s student fees.

The Task Force (whose membership is listed below) met from February 9 to May 7, 2018. The group began by gathering information and developing a shared understanding of the current student fees, their history, their purpose, and how the funds are spent. The group then discussed the purpose and value of the fees. The group worked to identify a path forward, develop recommendations, and prepare a report. Although not every member was able to attend every meeting, this report represents the major points of the Task Force’s discussions.
Membership of the Task Force

<table>
<thead>
<tr>
<th>Student members:</th>
<th>Faculty members:</th>
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<tbody>
<tr>
<td>Elijah Chandler, Chair, Student Diversity Committee, 2017-18</td>
<td>Dr. Julie Alderson, Professor of Art and Chair of the University Senate, 2017-18</td>
</tr>
<tr>
<td>Flinn Crosby, Member, University Resources and Planning Committee, 2017-18</td>
<td>Dr. Dale Oliver, Professor of Mathematics and Chair of the University Senate Integrated Curriculum Committee, 2017-18</td>
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<tr>
<td>Courtney Getter, Member, Intercollegiate Athletic Advisory Committee and student athlete (rowing), 2017-18</td>
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<tr>
<td>Joey Mularky, President, Associated Students, 2017-18</td>
<td>Advisors/Resource people:</td>
</tr>
<tr>
<td>Casey Park, Chair, University Center Board, 2017-18</td>
<td>Amber Blakeslee, Budget Officer</td>
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<tr>
<td>Kassandra Rice, Administrative Vice President, Associated Students, 2017-18</td>
<td>Dr. W. Wayne Brumfield, Interim Vice President of Student Affairs</td>
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<td>Jenessa Lund, Executive Director, Associated Students</td>
</tr>
<tr>
<td>Convenor:</td>
<td>Kate Stroup, Administrative Support, Student Affairs</td>
</tr>
<tr>
<td>President Lisa Rossbacher</td>
<td>Sandy Wieckowski, Manager, Student Financial Services</td>
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Overview of Category II Student Fees (Campus Mandatory Fees)

The focus of the Task Force is Category II Student Fees, which are mandatory campus fees that must be paid to enroll in or attend the university every semester. At HSU, Category II Student Fees include (as defined by the CSU):

- Health Services Fee: charged to all students for access to campus-based health services;
- Health Facilities Fee: charged to support a health-center facility;
• Materials, Services, and Facilities (MSF) Fee: charged to all students to cover various services, facilities, or materials that are made available to all students as part of the overall instructional experience;

• Instructionally Related Activities Fee (IRA) (CA Ed Code 89721/89230): charged to all students for instructionally related activities as authorized by the CSU Board of Trustees. As defined by the California Education Code, “Instructionally related activities mean 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”;

• Student Body Center Fee (Campus Union Fee): charged to all students to support the University Center (Student Union) facility;

• Student Body Association Fee (Education Code 89300): charged to all students and controlled by the Associated Students (AS). As defined by the California Education Code, “A student body organization may be established at any state university under the supervision of the university officials for the purpose of providing essential activities closely related to, but not normally included as a part of, the regular instructional program of the university."

In addition to the fees listed above, HSU has two mandatory Category II Fees that are charged once before a student’s first semester: Humboldt Orientation Program (HOP) Fee and ID Card Fee. The Task Force did not include these fees in their discussions.

**Assessment of Mandatory Fees**

**Health Services Fee (a.k.a. Student Health Fee or Health Operations Fee)**

In 2017-18, HSU had the second highest Health Services Fee in the CSU ($436 per year). This fee, along with the Materials, Services, and Facilities (MSF) Fee, was established with the understanding that it could be adjusted annually by the Higher Education Price Index (HEPI). The rationale for why HSU’s costs for health services are relatively high are articulated here: [https://wellbeing.humboldt.edu/healthier-together/cost-factors](https://wellbeing.humboldt.edu/healthier-together/cost-factors).

The Health Services Fee supports the operation of on-campus student health and psychological counseling services. These services are available for all students. The revenues from this source were estimated at $3.6 million in 2017-18. In addition, Student Health and Wellbeing Services received $733,000 in state funds in 2017-18.

Humboldt State has particular challenges providing both medical and psychological services in the region. About 20% of students have Kaiser insurance, whose closest location is about four hours away. About 30% of students are covered with a smaller regional insurance company that is “out of network” in Humboldt County, and about 30% have coverage by Partnership/Medical that is county-specific and must be transferred to be usable. The other 20% of students
who have Blue Cross/Blue Shield/United or similar coverage often have difficulty finding a healthcare provider in the area who will accept them as patients. All of these factors create a heightened demand for the services that are provided to students on campus.

In 2017-18, Student Health and Wellbeing Services determined that additional funding was needed to meet the students’ needs. The Student Fee Advisory Committee (SFAC) undertook an alternative consultation process to measure student support for a fee increase, from the current $218 per semester to $319 per semester, with a report and recommendation for the increase submitted on April 25, 2018. The projected benefits of this fee increase include enhancements in the areas of health services, counseling, health education, and food security. Some examples of what the new fee will make possible include the following:

- Shorter wait times, with more psychiatrists, mental health therapists, doctors, nurses, and other medical providers;
- Sustaining and expanding sexualized violence prevention programs like CHECK IT as temporary federal grant funding ends;
- Student employment opportunities (more than 50 students total with increases);
- 24/7 Plan B and other medication access through discreetly accessible vending machines;
- Advancement of convenient technology like 24/7 emotional support via text, on-line scheduling, and birth-control prescription renewals by phone;
- More availability and quicker scheduling of birth control implants, removals, STI screenings, and other lab work;
- Advertising and other activities to support recruiting diverse candidate pools for new hires and increasing training for staff, particularly in meeting the needs of underrepresented and marginalized communities;
- More Oh SNAP! Student Food Pantry and farm-stand services for students; and
- Expanded no-cost holistic health workshops for all students in yoga, mindfulness, meditation, cooking, and massage.

**Health Facilities Fee**

The Health Facilities Fee supports the repair and maintenance of the University Health Center building and equipment. Currently, students pay $6 per year in this category, and about a third of the total $47,000 generated annually supports mandated CSU and state overhead costs. The remaining revenue funds maintenance and repairs for the existing building.

In 2017-18, the Student Fee Advisory Committee undertook an alternative consultation process to increase this fee to either an initial proposal of $156 per year to support a new health center facility (in combination with a new building project) or $110 per year to repair and maintain the existing structure. Following the alternative consultation process, a report and recommendation were completed on April 25, 2018. The projected impact of this increase would include either repairing the existing facility and the required space for more staff or building a new facility. As currently envisioned, additional new construction would include
adding more medical and psychological counseling services, expanding basic needs services, and providing hundreds of new residence spaces for students. As HSU works to identify new options for affordable student housing, this new facility would combine housing, dining, and health services. The increased Health Facilities Fee would contribute significantly to this project. The Student Fee Advisory Committee also recommended that the health operations fee should increase annually by the Milliman Medical Index.

In response to the shortage of timely and affordable healthcare for students, this Task Force on Student Fees recognizes the need for improved health services, which requires additional resources. However, we also recognize that increases to fees must be considered carefully. Humboldt’s wellbeing site regarding the Health Operations and Facilities fees offers proposed solutions: [https://wellbeing.humboldt.edu/healthier-together/solutions](https://wellbeing.humboldt.edu/healthier-together/solutions).

**Materials, Services, and Facilities Fee (MSF)**

The Materials, Services, and Facilities (MSF) Fee was approved in July 2010 to replace all Category III miscellaneous course fees, except for course fees for field trips or travel over $50. The purpose of this fee is to support supplemental instructional materials, beyond the basic classroom, to enhance learning for students. Along with the Health Services Fee, the MSF Fee can be increased annually by the Higher Education Price Index (HEPI), if this is justified. The 2017-18 fee per student is $328, with an estimated revenue of approximately $2.5 million.

The Task Force expressed concern about the challenge of distinguishing between the purpose of the IRA fee and that of the MSF. In addition, although HSU does not have a Student Success Fee, the MSF is used in some similar ways to what a Student Success Fee would support. Students on the Task Force indicated particular concern about the absence of student input in how the MSF funds are spent.

The MSF Fee currently supports a number of staff positions; consequently, as the costs of salaries and benefits have increased, the number of other activities that can be supported by these funds has diminished. A related concern is that the fee, when it was originally established, was allocated to the academic colleges with 50% to Natural Resources & Sciences, 25% to Arts, Humanities & Social Sciences, and 25% to Professional Studies. The Task Force questioned whether this distribution needs to be reassessed.

**Instructionally Related Activities (IRA) Fee**

In 2017-18, HSU students pay $674 in IRA fees, the highest in the California State University System. The fee was originally established “to provide support for essential educational experiences and activities that aid and supplement the fundamental educational mission of the institution.” [https://associatedstudents.humboldt.edu/sites/default/files/ira_guidelines.pdf](https://associatedstudents.humboldt.edu/sites/default/files/ira_guidelines.pdf). The distribution of these fees is illustrated in Appendix A.
Over the last several years, a decrease in enrollment at HSU has reduced the funds available from student fees. For the IRA fees, the smaller number of students paying fees has meant reductions in support for many of the activities and groups that have traditionally been funded – and which, in many cases, have come to depend upon IRA Fee support.

The Task Force discussed each of the allocations of the IRA fee separately, as described below:

**Jack Pass**

The Jack Pass, as part of the IRA Fee, enables students to ride on public transportation in the region during the academic year by displaying a current student ID card. The Jack Pass constitutes $58 of the IRA Fee (the 2017-18 revenue for this fund was estimated at $451,000).

**Humboldt Energy Independence Fund (HEIF)**

The HEIF is a student-determined fee of $27 per year that the students voted to assess themselves in order to support energy-saving projects (the 2017-18 revenue for this fund was estimated at $209,000). One of the challenges of implementing this effort has been the lack of continuity in student involvement. The process of developing proposals and receiving approval and funding is long enough that, by the time a project is ready to move forward, the originator may have moved on to other initiatives or graduated.

One result of the existing process is that a significant fund balance has grown to $1.2 million, of which only about half is earmarked for current projects. HEIF is partnering with the Office of Sustainability to more actively manage this program to ensure that the funded projects are implemented in a timely way.

The Task Force also noted the general lack of awareness about HEIF-funded projects. Examples of completed projects include lights in the Redwood Bowl, hydration stations across campus, and energy-producing solar panels on the Music Building.

The Task Force believes that the purpose of HEIF is strongly connected to HSU’s mission and that the work should continue.

**IRA funds distributed by the IRA Committee**

Each student pays $64 per year toward the IRA Fee that is allocated by the IRA Committee (the 2017-18 revenue for this fund was estimated at $499,000).

The Task Force’s understanding is that allocations of the IRA fee from the committee must be connected to a specific course offering. This raised the question of what happens when the related course is eliminated, even if the activity is not. The Marching Lumberjacks were cited as an example of this concern; and there are other existing instances. In recent years,
additional exceptions have been made to support activities not directly tied to courses, such as Oh SNAP!, resulting in overlap with other student fee resources and less clarity about when IRA funds can or should be requested and approved.

The students on the Task Force noted that, each year, the politics and agendas surrounding IRA funding requests change. They raised the question of equity of allocations, given that the distribution among colleges is not equal. They also wondered about the patterns of department and program dependency on these funds. Additionally, they suggested that a lack of coordination among the various fees and funding sources may leave some worthy programs unfunded, while others may be funded from multiple sources.

**Intercollegiate Athletics**

IRA fees represent about 80% of the budget to support Intercollegiate Athletics (an estimated total of $4.1 million in 2017-18); the rest comes from donations, sponsorships, marketing, ticket sales, concessions, and other revenue sources. In an effort to minimize deep cuts to the University’s General Fund budget in 2007-08, the IRA Fee was significantly increased to support Athletics. Details of the expenditure budgets within Athletics are included in Appendix A.

IRA funds for Intercollegiate Athletics are used for personnel costs, team travel, equipment, and other operating costs. These funds cannot be used for student aid, which is supported primarily by donors. A growing challenge is that coaches and staff are included in collective bargaining agreements that are negotiated at the CSU’s system level; as salaries and benefits increase, HSU Athletics is required to cover these higher costs. As expenses have grown over the last few years, the IRA Fee and fundraising efforts have become insufficient to fund operating costs in Athletics. The decline in enrollment and resulting decrease in student fees has exacerbated this shortfall. This situation resulted in deficit in Athletics of $900,000 in 2017-18 and a projected deficit of $1.2 million in 2018-19 – if nothing changed.

The Task Force discussed the benefits to student-athletes of participating in Intercollegiate Athletics, which include scholarship support, priority registration for student athletes, building community, strong relationships with coaches, and academic support from tutors and required study halls. Student-athletes provide a link to the community, such as when the soccer teams work with local school groups, and Intercollegiate Athletics increasingly provides opportunities for leadership development for team members. The Task Force members also noted the value to other students of school spirit and free on-campus entertainment, although not all students realize that they have access to athletic events for free. They also commented on the fact that most students do not realize how much of their IRA Fee supports Athletics, and they questioned the logic and equity of having student fees subsidizing sporting events for the larger (off-campus) community. Annually, each student pays $525 in IRA Fees that go to support Athletics. There was concern expressed regarding the relative value of student fee investment in Athletics.
The Task Force members also noted that club sports have very limited budgets, with less than optimal equipment and inequities among sports. They suggested that any assessment of Intercollegiate Athletics should include consideration of club sports as well.

**Student Body Center Fee (a.k.a., University Center Fee or Campus Union Fee)**

This fee supports the University Center and related activities that serve students. The current fee is $185 per year, which is one of the lowest in the CSU (2017-18 revenue for this fee was estimated at $1.45 million). About one-third of the fee covers debt service for the University Center and Student Recreation Center buildings. The remainder supports Center Activities, Center Arts, and the operations of the University Center and Student Recreation Center. Students on the Task Force observed a general lack of student awareness about the purpose of the University Center Fee and a lack of clarity about how these funds are actually used.

The Task Force members discussed the value of the programs offered by Center Arts. Benefits include entertainment that is provided on campus and in safe spaces. The student members of the Task Force noted that performances scheduled by Center Arts sometimes appear to be serving the external community, rather than students, although they were aware that the revenues from these performances generate revenue that then supports student-driven entertainment. The infrastructure provided by Center Arts is also integral in supporting AS Presents, as well as providing employment opportunities for students.

A proposal to increase this fee in 2018-19 appeared as a referendum on the Associated Students ballot in April 2018 (http://www2.humboldt.edu/uc/feeinfo). The proposal would have increased the fee by $130 over a three-year period, to a total of $315 in 2021. Part of the justification for the increased fee was the need to increase funding for student employees as California’s minimum wage increases by $1 annually for the next four years.

The proposed fee increase was not approved in the student referendum, with 67% of the students who voted not supporting the increase. The University Center is working to clarify the impact of continuing with the same fee level and will develop next steps in summer and fall 2018.

**Student Body Association Fee (a.k.a., Associated Student Body Fee or Student Association Fee)**

The Student Body Association Fee is part of the Associated Students auxiliary organization. The fee is currently $117 annually (2017-18 revenue for this fee was estimated at $920,000); all of these funds support AS-related activities.

The Task Force noted the confusion surrounding the multiple names by which this fee is known. (See recommendations for the proposal to standardize the fee terminology.) This fee is used to help fund a variety of student programs, including the Women’s Resource Center.
Recommendations

Overall recommendations

1. The Task Force recommends that student fee assessments like the one undertaken by this group should be done on a regular cycle (perhaps every three years). The Task Force found value in having an open and frank discussion about the mandatory student fees, and the group recommends that this continue on a regular schedule. The members noted that the University did not get into our current situation in one year, and they acknowledged that aligning the fees with current student needs will also be a multi-year process. This Task Force also recommends that the managers or recipients of the various fees make presentations to student groups, including future task forces, to explain and give examples of how the fees are used and how these expenditures benefit students.

2. Many of the services provided by mandatory fees have costs that regularly increase. The Task Force recommends that all mandatory fees be allowed to increase annually up to the amount of the Higher Education Price Index (HEPI); the exception would be the Health Operations Fee and Health Facilities Fee, which could increase by the Milliman Medical Index to reflect the unique costs associated with health care. This should not be an automatic increase, but one that can be authorized, with appropriate justification, and without a referendum or alternative consultation. Currently, only the Health Services Fee and the MSF Fee have the potential for annual increases, based on the HEPI; only the MSF Fee requires a justification before it is adjusted. The University Budget Office, in consultation with the respective areas, will provide an analysis and justification to the Student Fee Advisory Committee as early as possible in the spring semester; SFAC will then forward its recommendation about applying the HEPI/MMI increases in the next fiscal year to the President.

3. The Task Force recommends that future fee increases should be considered with sensitivity to the impact on student finances. In general, no more than a 5% total increase to Category II fees is a reasonable guideline for the immediate future. We recognize that the recommended fee increases for 2018-19 total more than this amount, as this is an unusual year with a necessary recalibration of multiple fees.

4. As the University moves toward an integrated budgeting model, the Task Force recommends a more integrated decision-making process so that everyone understands the purposes of each fee. The goal is to minimize or eliminate multiple funding requests for a specific need being submitted to different sources. The Integrated Assessment, Planning, and Budget Group has already begun this discussion.
5. The Task Force identified a strong need for more and better communication about student fees to all students. Working with Student Financial Services, this report and fee information will be posted on the student portal, Canvas, and to other places where students will be able to find the information easily. The Task Force recommends that the Student Fee Advisory Committee develop a strong communication plan to ensure that students have information about the use of their fees. The Task Force discussed, but did not come to agreement, on the question of whether student bills should explicitly state how fees are expended. In the absence of an agreement, the Task Force advocates for more transparency and other ways of communicating to students how their fees are being spent.

Specific fee recommendations

Health Services Fee (a.k.a. Student Health Fee or Health Operations Fee)

1. Following an alternative consultation process in spring 2018, the Student Fee Advisory Committee recommended increasing the Health Operations fee by an additional $93 spread over multiple years. Humboldt’s wellbeing site provides details about the Health Services and Facilities fees with proposed solutions: https://wellbeing.humboldt.edu/healthier-together/solutions. The Health Services Fee should increase annually by the Milliman Medical Index (MMI). The Task Force supports the outcomes of the alternative consultation process, as recommended by the Student Fee Advisory Committee, to increase the Health Services Fee in order to increase services to students.

Health Facilities Fee (a.k.a., Health Facility Fee)

1. In April 2018, the Student Fee Advisory Committee (SFAC) recommended increasing the Health Facilities Fee, which will provide funding to repair and maintain existing space and could help fund new space in a future building that incorporates student housing, dining services, and basic-needs support. The SFAC concluded that the majority of the cost increase should be borne by the students who will benefit most directly, so they recommended implementing the increase gradually. The SFAC recommended that a $55 per semester increase should be spread over several years. The Health Facilities Fee should increase annually by the Milliman Medical Index. This fee specifically should be evaluated in the 2020-21 academic year to assure alignment with student needs and the proposed facility project’s progress.

2. The Task Force recommends that any MMI increase for the Health Services Fee or Health Facilities Fee must be justified by Student Health and Wellbeing Services and recommended by the Vice President of Student Affairs to the SFAC, which will then make a recommendation to the President for approval.

Materials, Services, and Facilities Fee
1. The Task Force recommends that the University review the use of MSF funds to assess their alignment with the authorized use of these funds in Executive Order 1050. Recognizing that the colleges and academic departments depend on these funds to support some of their academic programs, any uses that need to be modified will likely require a multi-year implementation plan.

2. The Task Force recommends that the allocation methodology for the MSF Fees be re-assessed to determine whether the 50%-25%-25% distribution to colleges continues to make sense with the current curriculum and enrollment distribution. A principled approach to addressing this distribution needs to be created.

3. The Task Force recommends that the Division of Academic Affairs develop a process that will involve students who are interested in participating in the discussion of how the MSF fees are utilized. In part, this process change will help ensure that the funds are being used in alignment with the original intent of the fee.

**Instructionally Related Activities Fee**

**Instructionally Related Activities Fee designated for IRA Committee**

1. The Task Force recommends that the IRA Committee discuss and clarify criteria for IRA funding prior to calling for proposals for 2019-20. The Task Force recommends that the Student Fee Advisory Committee honor currently funded programs that have been “grandfathered” in as eligible for funding without an associated credit-bearing course, but does not support adding new exceptions.

**Instructionally Related Activities Fee designated for Humboldt Energy Independence Fund (HEIF)**

1. The Task Force recommends continuation of the Humboldt Energy Independence Fund (HEIF), based on its creation by students and its alignment with the goals and values of the University. Questions were raised about what seems to be a relatively high fund balance, but additional information from the HEIF Committee clarified that these funds support higher-cost activities when those proposals come forward. Some of the fund balance is also a matter of timing, and many of the funds have already been committed.

2. The Task Force recommends that the HEIF Committee find additional ways of communicating with students about the fee, how it is used, and the campus-wide benefits of these energy-saving projects, in order to both increase awareness and to emphasize the benefits of this fund.

**Instructionally Related Activities Fee designated for Athletics**
1. The Task Force recommends that the University develop a multi-year plan to start shifting the salaries and benefits of coaches and staff to the state, as state funds are available, so that funding for increases could be provided from state allocations rather than having to be met entirely by student fees. This transition would clearly need to be implemented over multiple years.

2. The Task Force recommends that the University sponsor a town hall meeting in the fall semester 2018 to engage students in assessing the role of Athletics, both intercollegiate and intramural, in the life of the University. This meeting and its facilitation will need to be planned carefully to ensure that the conversation is both candid and inclusive.

3. The Task Force recommends that, when fee support for Intercollegiate Athletics is considered, other types of athletic opportunities in which student athletes can participate should also be considered, including clubs, intramural sports, and community leagues.

Student Body Center Fee (a.k.a., University Center Fee or Campus Union Fee)

1. The Task Force recommends that the University Center create a more detailed report on revenues, how these funds are used, and current reserve levels. How these funds are used is not clear, and accountability to students about how these funds are spent should be a high priority. A general lack of understanding of how the fees are currently used may have contributed to the lack of support for the University Center’s proposal for a fee increase in 2018-19. The proposal to increase the University Center Fee by $130 over the next three years was not endorsed in the referendum in spring 2018. The proposal, if approved, would have increased this fee by $35 per semester in fall 2018, $15 per semester in fall 2019, and $15 per semester in fall 2020, and then adjusted by HEPI after that time. In the absence of an approved fee increase, the University Center budget will need to be revised for 2018-19.

Student Body Association Fee (a.k.a., Associated Student Body Fee or Student Association Fee)

1. The Task Force recommends that the Student Fee Advisory Committee establish a single name for the fee and use it consistently.

2. The Task Force recommends developing a structure for clear communication among the student groups making decisions about fee funding, to ensure that funds are being used to maximum benefit. This communication should probably come from the Student Fee Advisory Committee.
3. The Task Force recommends that Associated Students consider ways to transfer their collective experience and knowledge from year to year, so that student leaders do not have to “reinvent the wheel” every year. Although the Task Force was focused on information about student fees, this goal makes sense in other areas of student government as well.

**Student Success Fee**

1. The Task Force recommends that Humboldt State should *not* propose the creation of a Student Success Fee. The MSF Fee already covers some of the uses that would be appropriate for a Student Success Fee, and the Task Force felt that adding this new fee could overlap with the goals of the MSF Fee and would decrease the affordability of education at HSU.

**Next steps**

The Task Force is committed to sharing this report as widely as possible – especially, although not exclusively, to students. This information will be shared with the Associated Students (AS) and the Student Fee Advisory Committee (SFAC) and via the AS website. The report will also be provided to the University Senate, the University Resources and Planning Committee (URPC), the University Center, and the senior leadership of the University. In fall 2018, AS, SFAC, and the Budget Office will partner to engage the University community more broadly to continue forward progress on Task Force recommendations.

Respectfully submitted,

Task Force on Student Fees

*10 May 2018*

**Relevant links**

- [Student Fee Advisory Committee](#)
- [Student Financial Services-Tuition and Fees](#)
Category II fees are campus mandatory fees that must be paid to enroll in or attend the university.

- HSU has the 5th highest campus mandatory fees in the CSU system
  - HSU had the 2nd highest back in 2012-13 – there has been a conscious effort to keep fee increases to a minimum in recent years
- HSU has the highest IRA Fee
- HSU has the 2nd highest Health Services Fee
- HSU has the 3rd highest Materials, Services, and Facilities (MSF) Fee
- HSU does not have a Student Success Fee – 12 CSU campuses do, although HSU’s MSF Fee does have some similarities
- The only built in annual fee increases are for the Health Services Fee, which increases by HEPI (Higher Education Price Index – inflationary index specific to higher education), and the MSF Fee, which also increases by HEPI if an increase is justified to maintain services. The five-year average HEPI is about 2%.

HSU Tuition and Fee Information: https://www2.humboldt.edu/financialservices/node/44
CSU System Fee Rates: http://www.calstate.edu/budget/student-fees/fee-rates/
CSU System Fee Policy Information: http://www.calstate.edu/budget/student-fees/fee-policy/
The IRA Fee provides funding for Intercollegiate Athletics, the Humboldt Energy Independence Fund (HEIF), the IRA Committee and the Jack Pass.

- Intercollegiate Athletics uses this funding, along with donations, ticket sales, concessions, etc., to cover sports program costs.
- HEIF funds are used for student-driven projects to help reduce the environmental impact of HSU’s energy use.
- The IRA Committee is a committee of the University Senate that provides funding for a variety of instructionally related student activities and programs.
- The Jack Pass allows students to ride on public transportation by simply showing their current student ID card.

Athletics IRA Fee Detail:

- The IRA Fee supports approximately 80% of Athletics operating costs (e.g. personnel costs, team travel, equipment).
- The Admin department consists of Athletics’ administrative costs (e.g. director, public information, marketing, admin support, and centrally managed costs that support all sports such as trainers, equipment managers, conference fees).
The Materials, Services, and Facilities (MSF) fee supports supplemental instruction material above the basic classroom level to enhance learning experience for students. The MSF Fee is distributed to the three academic colleges, with 50% allocated to the College of Natural Resources and Sciences (CNRS), 25% to the College of Arts, Humanities, and Social Sciences (CAHSS), and 25% to the College of Professional Studies.

A few examples of activities supported by this fee: field trips under $50, the CNRS core facility, the Marine Lab, and previously charged course fees (e.g. lab fees, art supplies).

The Health Services Fee, also referred to as the Student Health Fee, supports the operation of on-campus student health and counseling services. This service is available and provided for all students even if they have private health insurance. The annual fee rate for the Student Health Fee in 2017-18 was $436. The charts on the right reflect the current percent distribution of the overall Health and Wellbeing Services budget between Student Medical Services, Counseling and Psychological Services, and Health Education. In addition, Health and Wellbeing Services received $733,000 in support in the 2017-18 budget from the University’s Operating Fund.

The Health Facilities Fee provides funds for the repair and maintenance of the University Health Center building and equipment. The current fee is $6 per year. Of the $47,000 this fee generates, about 1/3 of the fee covers system/state overhead costs and the remaining revenue supports facility related maintenance and repairs.

The Student Body Association Fee is budgeted in the Associated Students auxiliary organization. These resources are used to provide services and activities for HSU students. The annual fee rate is $117, which generates approximately $920,000. 100% of the fee supports AS related activities.
The Student Body Center Fee, also referred to as the Campus Union Fee, is used to manage the student center and to make debt service payments on the bond that covered the construction costs of the campus union and recreation center buildings. The annual Student Body Center Fee is $185. There is no exact split for this fee - after debt service and system/state overhead charges are covered, the remaining balance is distributed to the University Center (UC) to support the Campus Union and other student related activities.
Appendix B.

2017-18 CSU tuition and fee rates

<table>
<thead>
<tr>
<th>2017-18 California State University Tuition and Fee Rates</th>
<th>Undergraduate Tuition*</th>
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<tbody>
<tr>
<td></td>
<td>Up to 6 units</td>
<td>Above 6 units</td>
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<tr>
<td>Bakersfield</td>
<td>$5,310</td>
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<tr>
<td>Channel Islands</td>
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<td>Chico</td>
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<tr>
<td>East Bay</td>
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<tr>
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<td>Long Beach</td>
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<td>Los Angeles</td>
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<td>Maritime</td>
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<td>Monterey Bay</td>
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<td>Sacramento</td>
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<td>San Bernardino</td>
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<td>Stanislaus</td>
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<tr>
<td>Average</td>
<td>$5,310</td>
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Average Campus Mandatory Fees $1,475

<table>
<thead>
<tr>
<th>Tuition Type</th>
<th>Amount</th>
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<tr>
<td>Professional Program Tuition*</td>
<td>$3,364</td>
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<tr>
<td>Graduate Per Credit Tuition*</td>
<td>$4,164</td>
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<tr>
<td>Education Doctorate Tuition*</td>
<td>$11,833</td>
</tr>
<tr>
<td>Nursing Practice Doctorate Tuition*</td>
<td>$15,270</td>
</tr>
<tr>
<td>Physical Therapy Doctorate Tuition*</td>
<td>$17,198</td>
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</table>

Graduate Business Professional* $180/quarter unit, $270/semester unit in addition to graduate tuition and non-resident tuition if applicable. $264/quarter unit, $396/semester unit in addition to applicable tuition rates.

*The campus mandatory fees are paid in addition to the above tuition rates.
### HSU Category II Fee History

**Date:** March 8, 2018

<table>
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<tr>
<th></th>
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<tbody>
<tr>
<td>Health Services*</td>
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<td>$794</td>
<td>$534</td>
<td>$388</td>
<td>$336</td>
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<td>Student Success</td>
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<td>Student Association</td>
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<td>Student Center [Campus Union]</td>
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<td>$ Change from Prior Year</td>
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<td>$581</td>
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<td>$74</td>
<td>$371</td>
<td>$575</td>
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<tr>
<td>% Change from Prior Year</td>
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<td>35%</td>
<td>3%</td>
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<td>1%</td>
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<td>1%</td>
<td>21%</td>
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*Health and MSO include annual 4% increase (MSO must be justified)

**2018-19 proposed amounts are not final and are subject to change. Listed for discussion purposes only**

<table>
<thead>
<tr>
<th>System Average</th>
<th>802</th>
<th>885</th>
<th>538</th>
<th>1045</th>
<th>1163</th>
<th>1214</th>
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<td>System Ave $ Change from Prior Year</td>
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<td>$187</td>
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<td>$73</td>
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<tr>
<td>System Ave % Change from Prior Year</td>
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<td>8%</td>
<td>11%</td>
<td>9%</td>
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<td>6%</td>
<td>4%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**CHANCE COMPARISONS**

- HSU 10 Yr Average Annual % Change (10-09 to 17-18) 4%
- System 10 Yr Average Annual % Change (09-09 to 17-18) 4%
- HSU 5 Yr Average Annual % Change (12-14 to 17-18) 1%
- System 5 Yr Average Annual % Change (12-14 to 17-18) 1%
October 10, 2012

TO:  Dr. Rollin C. Richmond, President

FROM:  Joan Tyson, Associated Students General Manager

RE:  Instructionally Related Activities (IRA) Committee Recommendations

Members of the IRA Committee made the following recommendations at their October 5, 2012 meeting. The Committee approved a proposal to amend existing IRA Guidelines as it pertains to course related general requirements and Sports Clubs eligibility for continued funding. According to current guidelines, in order for the Instructionally Related Activity (competition and production) to be considered for IRA funding it must be the result of a class or classes that are structured with the specific objectives of creating the activity. Due to the limited scope of these guidelines, some of the currently funded IRA programs will no longer be able to fulfill the requirements for IRA funding. In addition, due to the recent loss of support by the College of Professional Studies, Sports Clubs no longer meets the guidelines. Sports Clubs is now a program under the division of Enrollment Management & Student Affairs.

Proposed Revisions:

1. Activities (competition and production) to be considered for IRA funding must be the result of a class or classes that are structured with the specific objectives of creating the activity. Exceptions to the course requirement may be made at the discretion of the IRA Committee and approved by the President.

2. Allow Sports Clubs to continue to be eligible to apply for IRA funding based on the approved 1998 student fee referendum. Following the outcome of this referendum, Sports Clubs was included in the budget process and obtained support to be funded by the Instructionally Related Activities fee.

Your approval of these recommendations is also necessary.

Recommend Approval:  Approved:

Peg Blake  date  Rollin Richmond  date
Vice President Enrollment Mgt. & Student Affairs  President

ASSOCIATED STUDENTS  •  HSU  •  ARCATA, CA 95521-8299  •  (707) 826-3771
OFFICE OF THE GENERAL MANAGER