

Annual IRA Budget Workshop and Information Session

Tuesday, February 7, 2023 Thursday, February 9, 2023

Presentation Outline



1. Annual Budget Process & Timeline

Q1

Q2

Q3

Q2



2. IRA Advisor Appointment Form



3. IRA Budget Request Forms

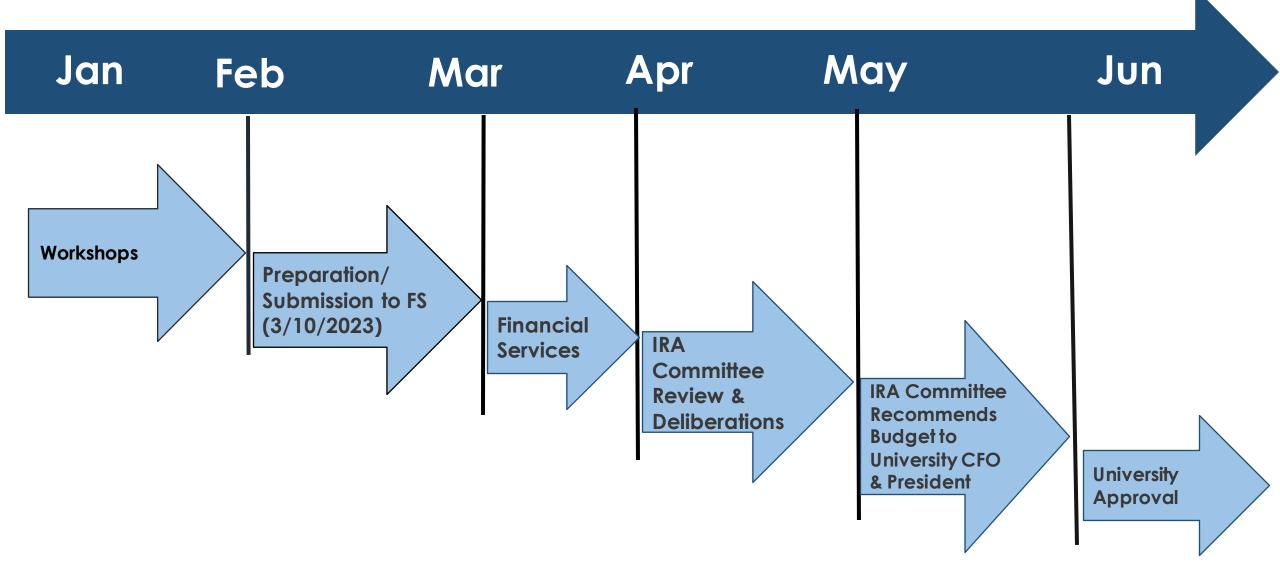




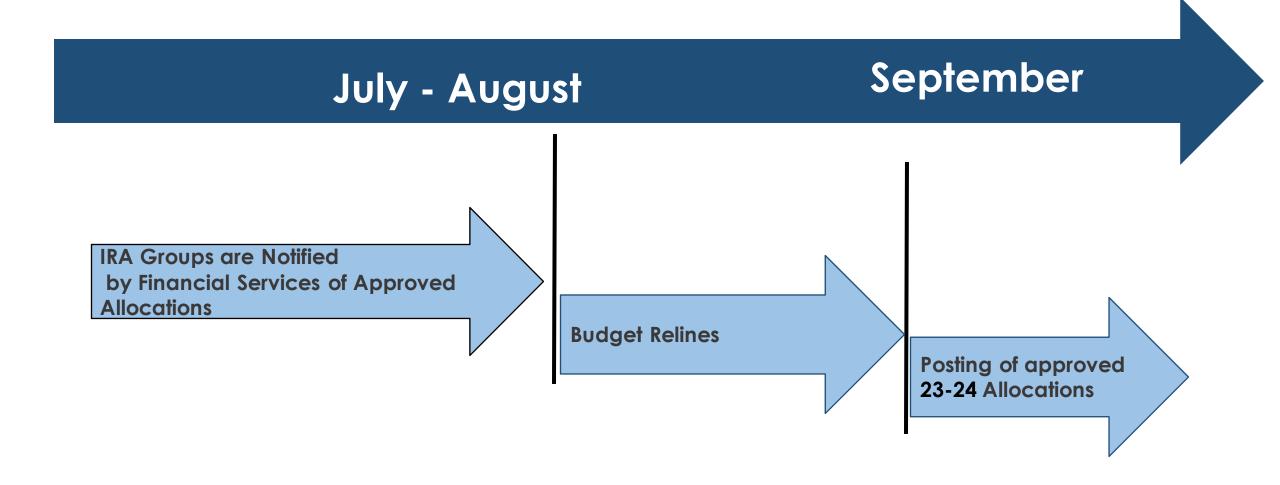
4. IRA Fee Revenue

5. Questions

Budget Process & Timeline



Budget Process & Timeline (Cont.)



IRA Advisor Appt. Form

- Advisor Eligibility Requirements
 - Employee of the University. ASI employees are not eligible to serve as Advisors.
 - Must identify a second advisor if they are on leave of absence during any part of the year.
 - Approved by his/her immediate Supervisor or Department Chair.
 - $\circ~$ Approved by Dean and/or Division Head.

CalPolyPomona



Administered by: Associated Students Incorporated, 3801 West Temple Avenue #35, Pomona, CA 91768

ADVISOR APPOINTMENT

Group Name

Fiscal Year ORIGINAL SIGNATURES MUST BE OBTAINED

| | FIRST ADVISOR A | PPOINTMENT REQ | UEST |
|-------------------------------|-----------------------------|-----------------|---|
| | of organization faculty/sta | | I am familiar with and will al by my Department Chair |
| Advisor Nominee - Print Name) | (Advisor Nominee Signature) | (Title) | (Date) |
| Department / College) | (Office | e Bldg. – Room) | (Office Ext) |
| Email address) | | | |
| SECO | ND ADVISOR APP | POINTMENT REQUE | EST (Optional) |
| | of organization faculty/sta | | I am familiar with and will al by my Department Chair |
| Advisor Nominee – Print Name) | (Advisor Nominee Signature) | (Title) | (Date) |
| Department / College) | (Office | e Bldg. – Room) | (Office Ext) |

(Email address)

DEAN, DEPARTMENT CHAIR / IMMEDIATE SUPERVISOR

I am in agreement with and give my approval for the above faculty/staff appointment. Both signatures are required.

| Department Chair or Head - Print Name) | (Department Chair or Head - Signature) | (Title) | (Date) |
|--|---|---------|--------|
| College Dean or Division Head - Print Name |) (College Dean or Division Head – Signature) | (Title) | (Date) |

Request Form

INSTRUCTIONALLY RELATED ACTIVITIES CALIFORNIA STATE POLYTECHNIC UNIVERSITY, POMONA BUDGET REQUEST FORM CalPoly Annual Budget Request IRA Budgeted Group Reline Request Pomona Mid-Year Budget Request 23-24 Budget Year Current Budget FY 22-23 Budget Budget Difference Academic Dept/ Org INCOME 1 2 3 4 Name Academic Advisor TOTAL INCOME Name EXPENSES Signature 5 6 7 8 9 10 Phone Number/E-mail Address Date 11 12 Authorized Student Signer 13 14 15 16 Signature 17 18 Phone Number/E-mail Address 19 TOTAL EXPENSE BALANCE (Income-Expenses) Authorized Student Signer (Optional) Name Note: Unspent IRA Funding will be centralized & used for next year's allocation. Signature *If applicable please provide any supporting documents and justifications. Phone Number/E-mail Address Date FOR OFFICE USE ONLY Committee Recommendation/ Date Financial Services Review/ Date President Approved Amount/ Date

Line-Item Explanation

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|-------|--|---------------------|--------------------------|-----------------|-------------------------------|-------------------------------|
| | Line Item Explanations 23-24 | • | | | | |
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| _ | 0 | | | - | - | |
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Budget Request Packet

Budget Questionnaire



Instructionally Related Activities **Budget Questionnaire**

| Num | Questions / Request for Additional Info | Responses |
|-----|--|--|
| | Name of Activity/Group: | |
| | Sponsoring Academic Department/Organization: | |
| 1 | Describe your instructionally related activity in o | letail to help the committee understand your budget request. |
| 2 | Describe the learning outcomes for the students | who participate in your instructionally related activity. |
| 3 | How will you assess your instructionally related : | activity? |
| 4 | Describe your assessment of the prior year's activ | vities and the results. |
| 5 | Describe the reasons for your budget and any ch | anges from the final relined budget of the prior year? |
| 6 | What other sources of income are you using to co student fee? | omplement funds provided by the instructionally related activity |
| 7 | What are your plans if you do not receive the ful | l amount requested? |
| 8 | What did we NOT ask you that you would like u | is to know? |
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| 23-24 Image: Mid: Year Budget Current Budget FY 22-23 Budget Difference Academic Dept/Org INCOME - - - - - Name 2 - - - - - - Name 3 - - - - - Name 3 - - - - Name 5 - - - Name 6 - - - Name 7 - - - - Name 8 -< | 23-24 Image: Budget Request Budget Current Budget Pran Difference Academic Dept/Org NCOME | Pomona | 1 | RA Budgeted Group | | Reline Request |
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| Committee Recommendation/ Date | | | | | | Committee Recommendation/ Date |

- 1. IRA Budgeted Group: your organization's name
- 2. <u>Budget Year</u>: FY 2023-24
- 3. <u>Type:</u> Annual Budget Request
- 4. <u>Signatures</u>: Financial Services is accepting electronic signatures/approval. There are three options on how to complete this process.
 - Printed Paperwork manually sign, and scan or take a picture of paperwork. PDF and JPEG files are acceptable.
 - Adobe Sign using Acrobat Use Adobe Acrobat to create your own personalized signature and electronically sign the document.
 - ✓ Type your name Type your name in the signature field. Then email the document to Financial Services at <u>asifs@cpp.edu</u>. Keep reading! When you email the form, copy (cc) two authorized signers on your account. One student authorized signer (other than yourself) and an advisor. Both the authorized signer and advisor can reply to your email with "approved." Financial Services will save the email as proof of approval.

Required

Sponsor Academic Department or Organization Academic Advisor Only one student signature is required

| gairory | | RA Budgeted Group | | Annual Budget Request Reline Request |
|------------------------------------|---------------------------|--------------------------|------------|---|
| CalPoly Pomona | | | | |
| | | 23-24 Budget Year | | Mid-Year Budget Request |
| Budget | Current Budget | FY 22-23 Budget | Difference | Academic Dept/ Org |
| COME | | | | |
| 1 | | | - | Name |
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| | | | | Phone Number/E-mail Address |
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Budget Request Form (Cont.

- Current Budget
 - Numbers from your most recent approved budget reline
- FY 23-24 Budget
 - Budget Request numbers for 23-24
- Difference
 - Auto calculates the differences between Current Budget and FY 23-24 Budget
- For office use only
 - Added: Committee Recommendation & President Approved Amount Lines

Line-Item Explanations

• Description Detail/Explanation

- <u>Line-Item Description</u> Auto populates from Budget Request Form
- <u>Non-IRA Sources of Funds</u> Full disclosure of all other funding sources (i.e., Foundation or state accounts)
- Make sure to include your calculations and assumptions for each line item. i.e. Conference \$ 5,500
 - Airfare \$250 X 10 Students = \$2,500
 - Lodging \$150 X 5 Rooms X 3 Nights = \$2,250
 - Meals \$25 X 3 days X 10 Students = \$750

• Per Student Rate / Number of Students (Expenses)

- Number of Students : Projected attendees
- Expense / number of students i.e., Conference \$5,500 \$5,500 / 10 students = Rate \$550
- Column A FY 23-24 Budget
 - Auto Populates from Budget Request Form
- Column B Non-IRA Budget Request
 - Auto Calculates (A-C)
- Column C- IRA Budget
 - Income Section IRA Budget Allocation
 - <u>Expenses Section</u> to spend IRA Allocation

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|---------|----------------------------------|-------------|----------|-----------------|-------------------------------|--------------|
| | Line Item Explanation | 5 | | | | |
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Instructionally Related Activities Budget Questionnaire

Fiscal Year 23-24

| Num | Questions / Request for Additional Info | Responses |
|-----|--|--|
| | Name of Activity/Group: | |
| | Sponsoring Academic Department/Organization: | |
| 1 | Describe your instructionally related activity in d | letail to help the committee understand your budget request. |
| 2 | Describe the learning outcomes for the students w | who participate in your instructionally related activity. |
| 3 | How will you assess your instructionally related a | activity? |
| 4 | Describe your assessment of the prior year's activ | vities and the results. |
| 5 | Describe the reasons for your budget and any ch | anges from the final relined budget of the prior year? |
| 6 | What other sources of income are you using to co student fee? | omplement funds provided by the instructionally related activity |
| 7 | What are your plans if you do not receive the ful | l amount requested? |
| 8 | What did we NOT ask you that you would like u | is to know? |

- 1. Activity has detailed plans that help the committee understand the budget items
 - 3 There are detailed plans and the connections to the budget items are easy to understand

2 - <u>Plans are lacking detail</u> OR the connections to the budget items are <u>not easy to</u> <u>understand</u>

1 – <u>Plans are lacking detail</u> AND the connections to the budget items are <u>not easy to</u> <u>understand</u>

0 - Details and connection to the budget items are absent or very difficult to understand

- 2. Planned activities are connected to specific student learning outcomes
 - 3 <u>Learning outcomes are well described</u> and the connections between the learning outcomes and the planned activities are easy to understand
 - 2 <u>Learning outcomes are not well described</u> OR the connections between the learning outcomes and the planned activities are not easy to understand
 - 1 <u>Learning outcomes are not well described</u> AND the connections between the learning outcomes and the planned activities are not easy to understand
 - 0 Learning outcome are absent or very difficult to understand
- 3. Activity has appropriate assessment plans for the coming year

3 – A strong assessment plan is provided, including long-term outcomes and assessments beyond the direct performance of students in the activity (e.g. beyond exam scores or participation in event)

- 2 A <u>reasonable assessment plan is provided</u>, but the plan is mostly related to the direct performance of the students in the activity
- 1-Assessment plans are minimal OR assessment plans are not clear
- 0 Assessment plans are absent or very difficult to understand

 Assessment has been completed on recent activities and demonstrates successful achievement oflearning outcomes

- 3 Assessment has been completed with successful achievement of learning outcomes (OR The request is for the first year of this activity; it is not possible to have completed assessment)
- 2 Assessment efforts are underway
- 1 Questionnaire says <u>learning outcomes are achieved</u> but assessment method is not clear or the assessment period is not recent
- 0 Information about assessment results is absent or very difficult to understand
- 5. The reasons for changes from the Current Budget are clear
 - 3 The reasons for <u>each</u> of the changes are clearly described (OR the budget requested matches the Current Budget)
 - 2 The reasons for some of the changes are clearly described
 - 1-Some changes are described but the description is not clear
 - 0 Description of changes to the current budget is absent or very difficult to understand



The committee uses the Rubric to evaluate and score budget proposals.

- 6. IRA funding is complemented by other sources of income that are clearly described
 - 3 Other sources of income are <u>clearly described along with</u> how the<u>y complement</u> IRA funding
 - 2 Other sources are not clearly described OR how they complement IRA funding is not clear
 - 1 Other sources are not clearly described AND how they complement IRA funding is not clear (OR describes why no other sources of income are available/appropriate)
 - 0 Information on other sources of income is absent or very difficult to understand

F. Budget request gives clear explanations for each item and demonstrates careful efforts to obtainaccurate pricing

- The Budget Request Form:
- 3 Provides clear explanations and demonstrates careful efforts on pricing
- 2 Does not provides clear explanations OR does not demonstrate careful efforts on pricing
- 1 Does not provides clear explanations AND does not demonstrate careful efforts on
- pricing
- 0 Explanations about budget items are absent or very difficult to understand

IRA Fee Revenue







• IRA fee per student does not change from year to year

Factors that can that can affect your IRA budget allocation

- 1. **Projected enrollment**
- 2. Possible addition of new IRA groups
- 3. Anticipated increases in funding request for existing groups

IRA Funds

IRA fund prohibits state-funded and state-sponsored travel to these states:

Alabama
 Arizona
 Arkansas
 Florida
 Georgia
 Idaho
 Indiana
 Iowa
 Kansas
 Kentucky
 Louisiana
 Mississippi

13.Montana
14.North Carolina
15. North Dakota
16.Ohio
17.Oklahoma
18.South Carolina
19.South Dakota
20.Tennessee
21.Texas
22.Utah
23.West Virginia

Things to Remember

- Budget Requests are due to <u>Financial Services on March 10, 2023, by 5</u> <u>pm</u>
- > Only requests submitted on the new forms will be accepted
- > All Budget requests must be typed, signed and fully completed
- > No need to budget for carryover (unspent IRA Funding will be centralized & used for next year's allocation)
- > Gray Shaded Cells = not required
- > Green Shaded Cells = Automatic Populated/Calculated
- > Blank Cells= write in required

| | | | Contacts |
|--|---------------------------|--|-----------------------------------|
| | | Lisa Rotunni Executive Director Academic Resources IRA Co-Chair | • <u>lmrotunni@cpp.edu</u> |
| Janette Santana ASI Financial Services Manager | • jksantana@cpp.edu | Aliza Ortega ASI President IRA Co-Chair | • <u>asivicepresident@cpp.edu</u> |
| Arven Ariola Budget Analyst | • <u>acariola@cpp.edu</u> | Ivonne Cabezas Associate Director of ASI Financial Services | • <u>imcabezas@cpp.edu</u> |
| | <u>Microsoft Teams</u> | Video/Telephone Call | |

Please use individual staff email addresses to connect





| Tuesday | 11 a.m. – Noon (Budget Questions) Zoom ID: 719 244 6104 |
|----------|---|
| Thursday | 2 – 3 p.m. (Budget Questions) Zoom ID: 719 244 6104 |
| | |

Email: asifs@cpp.edu