

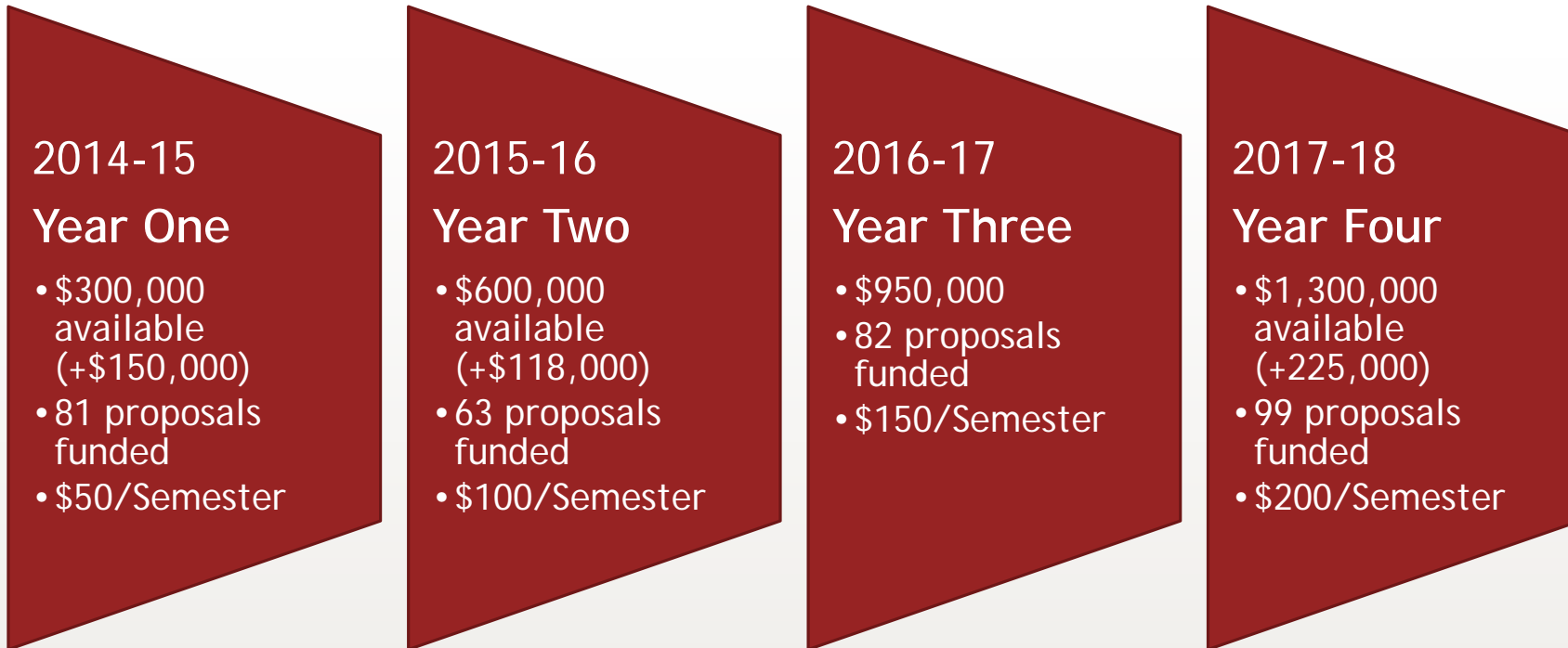
Student Success Fee Academic Related Programs (SSF-ARP)

BUDGET WORKSHOP FOR SSF-ARP AWARDED PROPOSALS



SAN DIEGO STATE
UNIVERSITY

Academically Related Programs



Final Report Due

May 15, 2018 (Tuesday)

SSF Expenditure Managers:

College contact for all awarded proposals. If you need help or have a question that you can't find the answer to online. Reach out to your SSF College Contact.

Evelyn Alroy
Arts & Letters
Analyst
619-594-5812
✉ Email

Christina Pablo
Business
Analyst
619-594-1809
✉ Email

Julie White
Education
Budget Manager
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Engineering
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Analyst
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Resource Manager
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Courtney Ransom
Graduate Studies
Assistant to VP & Dean
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Anna Avendano
Undergraduate Studies
Resource Analyst
619-594-8998
✉ Email

General Questions:

Please contact via email at studentsuccessfee@mail.sdsu.edu



SSF-ARP Proposal Responsibilities

- Must adhere to deadlines and procedures (Dec 1st, 2017- May 15th, 2018)
- Student Contact listed has primary responsibility for the project:
 - Provide upfront and ongoing communication with the college contact to facilitate project expenditures.
 - Report project outcomes upon completion of project via email link.
(Due May 15th, 2018)



Permitted Expenditures

- Supplies and Services
- Communication and Printing
- Travel
 - Food and Lodging (\$110 per day max)
 - Mileage (\$0.535 per mile)
 - Use of Private Vehicles
 - Other Forms of Travel
- Guest Lecturers



Supplies and Services

- Supplies are defined as office and/or project material
- Services are defined as charges for such items as machine maintenance, film copying/cutting, equipment rental, or contracts for specialized services such as music arranging or guarantees.



Communication and Printing

- Communication and printing consists of:
 - Telephone
 - Postage
 - Copying
 - Printing
 - Marketing

Travel

- Travel \$80 \$30
 - Maximum daily travel reimbursement allowance is ~~\$60~~ for lodging and ~~\$20~~ for meals
 - Defined as transportation, registration, meals, etc. when traveling for the University.
 - No food/lodging reimbursement for travel less than 24 hours
 - Travel expenses must be economical (NO 1st class airfare, 5-star hotels, or rented limos)
 - SSF funds may pay transportation expenses for one faculty/staff advisor per trip
 - Other travel costs for the faculty/staff advisor must be paid from alternative funding source
 - CSU Travel Restrictions, CA Assembly Bill 1887 prevents travel to : KS, MS, NC, TN, AL, KY, SD, TX
- Food and Lodging
 - Food receipts are not required to be submitted to Accounts Payable.
 - All lodging receipts are required with a list of the occupants who stayed in the room.



Travel

- Mileage
 - Vehicle mileage reimbursement is not to exceed the cost of a reasonable round trip fare.
 - Mileage reimbursement will be based on the most current IRS rate (\$0.535 per mile)
- Use of Private Vehicles
 - SSF-ARP assumes no responsibility for individuals operating private vehicles./
 - Insurance costs to the individuals are considered to be part of the mileage reimbursement.
 - The State of California form, "Authorization to Use Privately Owned Vehicles on State Business (Std. 261", must be signed by each driver before transporting passengers on an SSF-ARP funded activity.
 - The form certifies that the driver (1) holds a valid CA driver's license, (2) is covered by at least liability insurance and (3) will observe safety standards.



Guest Lecturers

- Guest/Special Lecturers are defined as those given by non-campus speakers. Guest/Special Lecturers are defined as either domestic or foreign based upon their residency status. Payments to non-individuals can also be made using SSF-ARP funds.

Payment Options

- Purchase Orders
- Direct Payments to Vendors for Goods
- Reimbursement to Individual for Goods
- Advance to Individual for Goods
- Guest Lecturers (Domestic & Foreign)
- Pre-Travel (Forms required & Advances)
- Post-Travel (Forms required & Reimbursement)



Purchase Orders

When a Purchase Order is Required

- All services
- Goods over \$4000
- Any item with a hard drive

How to get a Purchase Order Paid

- Department creates a PO through the requisition process
- Supplier submits invoice referencing the PO to Accounts Payable
- Payment is made directly to the supplier once services are completed and/or goods are received.

Due to the unique nature of SSF-ARP and the high degree of student involvement, it is recognized that the normal processes of requisitioning in advance may not always be viable. Therefore, the reimbursement and advance options are available.

Direct Payments to Vendors for Goods

- When a Direct Payment Can Be Used
 - Goods under \$4000
 - Items without a hard drive
- How to get a Direct Payment Paid
 - Department/Student(s) make arrangements with the supplier to direct bill the University for the goods.
 - Supplier submits invoice to the department
 - Department completes the Direct Payment Form, must follow the departmental FAH delegation of authority, attach the invoice to the Direct Payment Form and submit to Accounts Payable for processing.
 - Payment is made directly to the supplier.



Reimbursement to an Individual for Goods

- When a Reimbursement to an Individual can be made
 - When a purchase must be made out of pocket for goods, a reimbursement may be made to that individual
- How to get a Reimbursement to an individual Paid
 - Individual completes the Direct Payment Form with their self as the payee.
 - Approval of the reimbursement must follow the departmental FAH delegation of authority
 - Attach original and itemized receipts to the Direct Payment Form and submit to Accounts Payable for processing
 - Payment is made directly to the individual and mailed to the address listed on the form.

Please see the SSF-ARP Project/Activity Checklist for additional information



Reimbursement to an Individual for Goods

- When a Cash Advance to an individual for Goods can be made
 - When the exact amount needed is unknown
- How to get a Cash Advance to an Individual for Goods
 - Individual completes the Direct Payment Form with their self as the payee and selecting the “Student Non-Travel Advance (SSF/IRA)” as the “Type”
 - Approval of the advance must follow the departmental FAH delegation of authority.
 - Submit to Accounts Payable for processing
 - Payment is made directly to the individual and mailed to the address listed on the form

NOTE: Advances MUST be paid back or receipts must be provided within two weeks of when the funds are received.



Reimbursement to an Individual for Goods

How to Reconcile a Cash Advance to an Individual for Goods

- Attach original and itemized receipts to the SSF-ARP Cash Advance Summary Report and submit to Accounts Payable for processing.
- Any unused funds must be paid back with a check made payable to San Diego State University and attached to the SSF-ARP Cash Advance Summary Report

Guest Lecturer

- How to get a Domestic Guest Lecturer Paid
 - Department or Individual completes the *Guest Lecturer Payment Request Form-Domestic*
 - Payment must be inclusive of all travel costs
 - Approval of the Guest Lecturer form must follow the departmental FAH delegation of authority
 - Copy of the flyer, bulletin or brochure must be attached to the Guest Lecturer form and submitted to Accounts Payable for processing.
- Notes Regarding Domestic Guest Lecturer
 - If the lecturer is a CA nonresident, payment may be subject to CA tax withholding of 7% for accumulative payments over \$1500
 - All Domestic Guest Lecturers payments are reportable income (1099)
 - No payments will be issued until a completed *Supplier Information Form* is on file.



Foreign Guest Lecturer

- How to get a Foreign Guest Lecturer Paid
 - Department or Individual completes the Guest/Special Lecturer Payment Request Form-Domestic
 - Approval of the Guest Lecturer form must follow the departmental FAH delegation of authority
 - Copy of the flyer, bulletin or brochure must be attached to the Guest Lecturer form and submitted to Accounts Payable for processing.
- Notes Regarding Foreign Guest Lecturer
 - All payments to a foreign guest lecturer will be routed to the University Tax Analyst for a tax analysis based on their residency status
 - Payment may be subject to CA tax withholding of 30% or more based on their residency status
 - No payments will be issued until a completed Supplier Information Form and W-8BEN are on file.



Student Pre-Travel

(Forms required & Advances)

- A completed, *SSF-ARP Student Travel Authorization form* must be signed by the Traveler, Program Advisor and the Dean or Designee and submitted to Accounts Payable
- This form will indicate to Accounts Payable if a Travel Advance or Direct Payment is needed
- A completed, signed, and dated Release of Liability form must be kept on file in the department
- A current, signed and completed Authorization to Use Privately Owned Vehicle on State Business form must be on file with the Public Safety office
- A completed, Foreign Travel Insurance form must be completed and submitted to Nancy Demic (619-594-5937) in the office of Risk Management - FOREIGN TRAVEL ONLY
- Office of International Programs (OIP, 619-594-0938) must be advised of the trip and any forms or approvals required by OIP must be completed or obtained - FOREIGN TRAVEL ONLY



Student Post-Travel

(Forms required & Reimbursements)

A completed Travel Expense Claim form must be submitted to Accounts Payable for processing within 60 days of the last date of travel (within two weeks of when an Advance was given)

- Any Direct Payments or Advances must be listed on the form in the appropriate column
- Mileage reimbursement request must be supported by a standard highway mileage guide such as Google Maps
- Original and itemized receipts must be attached to support reimbursement request.

Student Post-Travel

(Forms required & Reimbursements)

A completed Travel Expense Claim form must be submitted to Accounts Payable for processing within 60 days of the last date of travel (within two weeks of when an Advance was given)

- Any Direct Payments or Advances must be listed on the form in the appropriate column
- Mileage reimbursement request must be supported by a standard highway mileage guide such as Google Maps
- Original and itemized receipts must be attached to support reimbursement request.

SSF Funding Restrictions

The following expenditures are **NOT ALLOWED**:

- Food (i.e. refreshments, snacks, appetizers)
- Tutoring
- Giveaways/Incentives (t-shirts, tote bags, gift cards, etc.)
- Direct costs to the educational programs that should be paid by instructional funds
- Expenses directly related to offering a course
- Grant in aid of any kind (i.e. Scholarships, grants, study abroad or stipends)
- Individual research
- Payment to any SDSU student/faculty/staff (unless for student travel/expense reimbursement)
- Consult with your SSF College Contact if you have any questions



SSF Funding Restrictions

Equipment

- Equipment is defined as non-consumable. Purchase of equipment may be considered in exceptional cases and must be included in the approved budget.
- All non-consumable items purchased are considered university property and must be returned to the college when the project is completed.
- SSF-ARP funds will NOT support purchase of equipment that is more appropriately supported via an alternate funding source (i.e. computer lab, research lab, etc.)
- If purchases are made by students, itemized receipts are required for reimbursement for supplies.



Contact Information

General Assistance: Accounts Payable (A/P)

Main Line: 619-594-0894

Email: accountspayable@mail.sdsu.edu

Payment Processing Questions: 619-594-5246

Travel Questions: (Lance Greenzweig & Kathy Echols)

Lance Contact Info: 619-594-4059 / lgreezweig@mail.sdsu.edu

Kathy Contact Info: 619-594-4183 / kechols@mail.sdsu.edu

Candice Cooper (A/P Interim Manager)

Contact Info: 619-594-5289 / ccooper@mail.sdsu.edu



Student Success Fee Website Forms



Student Success Fee

[2017/2018 ARP](#)

[2016/2017 ARP](#)

[2015/2016 ARP](#)

[2014/2015 ARP](#)

[About](#)

[Contacts](#)

[Forms](#)

[Policy and Procedures](#)

[Student Resources](#)

[Tenure Track Funds](#)

[FAQ](#)

[BFA](#) / [Financial Services](#) / [Budget](#) / [Student Success Fee](#)

Student Success Fee

In the Spring of 2014, a new mandatory Student Success Fee (SSF) was approved, effective Fall 2014. A portion of the fee (10%) is dedicated to enhancing student success through expanded Academic Related Programs. The remaining portion of the fee (90%) is used to increase the number of tenure-track faculty lines and course sections.

Academic Related Programs (ARPs) are defined as those activities and programs which extend the formal learning experience in a course or academic program. They provide an opportunity for students to become engaged and involved in their education outside of their academic courses to enrich their overall educational experience. ARPs involve a faculty, staff, or campus administrator in a support role to the students working on specific projects. Examples of ARPs include but are not limited to student colloquia, lecture series, seminars, student projects, student competitions, student forums, student exhibitions, student productions, student performances, and participation at professional conferences.

UPDATES:

- Maximum daily student travel reimbursement allowance is now **\$80** lodging and **\$30** for meals
- CSU Travel Restrictions, [CA Assembly Bill 1887](#) prevents travel to : KS, MS, NC, TN, AL, KY, SD, TX

ANNOUNCEMENTS

[SSF-ARP Awarded Proposals](#)

In total, 99 applications were awarded totalling \$1,525,000 in funding. Awarded proposals now have between December 1, 2017 - May 15, 2018 to complete their projects.

Go to ssfee.sdsu.edu or studentsuccessfee.sdsu.edu

Student Success Fee Website Forms

Student Success Fee

[2017/2018 ARP](#)

[2016/2017 ARP](#)

[2015/2016 ARP](#)

[2014/2015 ARP](#)

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[Tenure Track Funds](#)

[FAQ](#)

[BFA](#) / [Financial Services](#) / [Budget](#) / [Student Success Fee](#) / [Forms](#)

Forms

Policy

- [SSF-ARP Policy and Procedures Manual](#)

Project/Activity

- [Project/Activity Checklist](#)
- [Cash Advance Form](#)
- [Direct Payment Form](#)

Guest Lecturer

- [Guest Lecturer Checklist](#)
- [Guest Lecturer Payment Request Form - Domestic](#)
- [Supplier Information Form](#)
- [Guest Lecturer Payment Request Form - Foreign](#)
- [Foreign National Information Form](#)
- [W-8BEN \(Individual\) - FOREIGN GUEST LECTURER ONLY](#)
- [W-8BEN \(Entity\) - FOREIGN GUEST LECTURER ONLY](#)

Travel

- [Student Travel Checklist](#)
- [Student Travel Authorization Form](#)
- [Release of Liability Form](#)
- [Authorization to Use Privately Owned Vehicles on State Business \(Std. 261\)](#)
- [CSU Use of University and Private Vehicles Policy Guidelines](#)
- [Travel Expense Claim Form](#)
- [Foreign Travel Insurance Form - FOREIGN TRAVEL ONLY](#)
- [Faculty/Staff Advisor Travel Checklist](#)



Questions?

