SAN DIEGO STATE UNIVERSITY

Subject:	**Student Success Fee Academic Related Programs (SSF ARP) Policy and Procedures**

Department Name:	All

Supersedes:	Student Success Fee Academic Related Programs (SSF ARP) (11/7/2022)
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Approved by:	Joshua Uhlich, Director of Procure-to-Pay Joshua Uhlich (Jan 14, 2026 16:22:48 PST)

What are Student Success Fee Academic Related Programs (SSF ARP)?

SDSU implemented a Category II Student Success Fee effective in fall 2014 for the purpose of hiring additional tenure-track faculty and providing funds for enhancing student success through expanded academic related programs beyond what can be supported by state funding or existing student fees. The fees get updated by the bursar's office per semester for the academic year. The semester and summer fee will increase based on the Higher Education Price Index (HEPI) inflationary factor annually.

Ten (10) percent of the Student Success Fee revenues will support Academic Related Programs. Academic Related Programs are defined as those activities and programs which are an extension of 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. Academic Related Programs are at least partially sponsored by an academic discipline or department and are integrally related to the formal instructional offerings of the campus.

How are the funds accounted for?

There is a process for students to submit proposals to be funded from SSF ARP funds. This process is jointly managed by Student Affairs and Campus Diversity and the Campus Fee Advisory Committee (CFAC).

Student Affairs and Campus Diversity (SACD) will create an activity code for each college and IV campus to allocate budget and track expenses. SACD will provide the Budget and Finance Office a list of the SSF ARP allocations, by college, upon final approval by CFAC. The SSF ARP funds will be allocated to each college activity in Oracle fund 1018 and endeavor 80XX with the last two digits designating the fiscal year of the allocation. For example, for fiscal year 2025/26**,** the endeavor value is 8025. The Budget and Finance Office will process the budget for SSF ARP Fund 1018 based upon the allocations provided by SACD.

Who processes the funds and approves the SSF ARP Expenditures?

SSF ARP fund 1018 will be added to the Fiscal Approval Hierarchy (FAH) for the Division of Student Affairs and Campus Diversity with an allocation for a given fiscal year. The specific endeavor value assigned to each fiscal year MUST be used for both budget and expenditure of SSF ARP funds. Expenditures will be processed through routine established processes, e.g. requisitions, special guest lecturer forms, etc. Approval authority will be as established on the SACD Divisional FAH.

The Division of Student Affairs and Campus Diversity is responsible for expending SSF ARP funds consistent with the approved proposal and funds are not available for reallocation to other programs. Any changes to the purpose/proposal authorized, or changes to the project budget greater than $250 after initial approval, must be approved by the Associate Vice President for Finance and Operations, Student Affairs and Campus Diversity. Unused funds will be returned to SACD upon completion of the program and once all program

expenditures are finalized. SACD will reallocate these unused funds during the next proposal funding process.

When can I start spending my SSF ARP funds?

Requisitions and expenditures can be processed as soon as the allocated budgets are posted. All expenditure activity including requisitions, guest lecturer payments and check requests, must be processed within the annually published year-end guidelines (available on the Year-End Central website).

What do I do if I want to transfer funds from one SSF ARP account to another?

Budgets are posted by college based on approved SSF ARP proposals. The Division of Student Affairs and Campus Diversity is responsible for ensuring that each of the approved programs does not over-spend its allocation.

When will the disbursement be processed and where is the check sent?

Disbursements are processed through Accounts Payable via their routine cycles. Payment terms for suppliers are net 30. Payments to individuals may be disbursed via electronic funds transfer. The Employee Direct Deposit Authorization Form on the Accounts Payable website may be used for both employee and student reimbursement and may be submitted along with the invoice or check request. Payments not issued via EFT will be sent to the address on file in the Accounts Payable Supplier database. For employees, it is their address of record in the PeopleSoft HCM system.

What types of expenditures are NOT permitted?

- Entertainment, including food, gifts, awards, incentives, hospitality table, clothing (unless used as a team identifier)
- No fundraising is permitted.
- Department recruitment costs when a candidate is asked to give a lecture
- Direct costs to the educational program that should be paid by instructional funds
- Expenses directly related to offering a course
- Equipment
  - Equipment is defined as non-consumable. Purchase of equipment that is integrally related to the Academic Related Program may be considered in exceptional cases and must be included in the approved budget for the SSF ARP project.
  - All equipment purchased with SSF ARP funds is University property and must be accounted for according to the University asset management policy.
- Per diem costs for Program Advisor travel
- No SDSU faculty, staff or students are permitted to be paid as guest/special lecturers or otherwise using SSF ARP funds, with the exception of student travel reimbursement
- Grant in Aid of any kind, i.e. Scholarships, Grants, Study Abroad or Stipends

What types of expenditures are permitted?

Supplies and Services: Supplies are defined as consumable office materials, e.g., scissors, staples, paper, etc. and they must be shipped to SDSU, not to an off campus address. Services are charges for such items as machine maintenance, film/negative copying/cutting, equipment rental, or specialized services such as music arranging or guarantees

Communication and Printing: Communications and printing consists of marketing, postage, copying and printing costs.

Team Identifier: If the project budget allows for a team identifier, such as a polo, there is a limit of $40 per person for such items.

Travel: All travel must be in compliance with the CSU Travel Policy.

Travel is defined as transportation, registration, meals, etc. when traveling. Currently, the IRA/SSF ARP student travel allowance for lodging is up to 50% of the faculty staff rate as defined by the CSU Travel

Policy. Receipts are required for lodging. Food has a maximum per day allowance of $45 and is reimbursed as per-diem based on budget and department approval. There are occasions where funds may not be distributed directly to the travel party members but applied instead to the group's lodging or meal expenses.

For any kind of travel (air, land or sea) involved with an SSF ARP activity, the required forms are listed on the IRA/SSF ARP Checklist. Reimbursements, advances, or purchase order requests for travel will not be processed unless the required travel forms, (as applicable) are completed, approved and signed by the Program Adviser and SSF Administrator prior to the departure date.

An IRA/SSF ARP Travel Authorization form, signed by the Program Adviser and approved by the SSF Administrator or designee, must be submitted before the travel occurs. An SDSU Concur Request and Expense Claim for the Program Adviser must be approved by his/her supervisor, Dean and FAH approver. SSF ARP funds may pay for the transportation expense for one Program Adviser per trip, but per diem costs for the Program Advisor must be paid from non SSF ARP funds. All travelers may be reimbursed for travel after the trip on the Travel Expense Claim form.

- *Food and Lodging*: Any food receipts submitted for reimbursement must include a detailed list of food items ordered. All receipts for lodging are required with a list of the occupants who stayed in the room. Food costs will not be reimbursed when the related travel period is less than 24 hours.

- *Mileage:* Vehicle mileage reimbursement is not to exceed the cost of a reasonable round trip fare (airline, train, bus). In other words, if the cost of vehicle travel (claimed either on an actual cost-of-gas basis or on the mileage allowance) exceeds the cost of air travel for an individual, reimbursement will be made at lower of the two, i.e., the airfare equivalent. The current vehicle mileage rate is listed in the SDSU Travel Procedures and Regulations document.

- *Use of Private Vehicles:* SSF ARP assumes no responsibility for individuals operating private vehicles. Insurance costs to the individual 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 in a privately owned vehicle on an SSF ARP activity. This form certifies that the driver (1) holds a valid California driver's license, (2) is covered by liability insurance and (3) will observe safety standards.

- *Other Forms of Travel:* When traveling, ticket stubs/passenger receipts must be retained and submitted to the SSF ARP department contact. Receipts turned in must reflect passenger name, travel dates, destination & cost of fare.

Guest/Special Lectures: Special lectures are defined as those given by non-campus speakers. Special lectures are paid by honorarium. Special lecturers must be approved through the established college process or through Associated Students if no college process exists. No SDSU or CSU faculty, staff or students are permitted to be paid as guest/special lecturers. Guest/special lecturer services may be held in person as long as Covid protocols are followed.

The AP Payment Request for Guest/Special Lecturer form must be used for honorarium payments for services performed and paid to individuals and entities, i.e., guest lecturers, music arrangers/copiers. A copy of the flyer or bulletin/brochure announcing the lecture or event, with acknowledgement of SSF ARP funding, must be attached also to the Guest/Special Lecturer form.

A Payment Data Record is also required for honorarium payments for services by individuals who are U.S citizens. The Payment Data Record Form (PDR) is required to be submitted with the AP Payment Request for Guest/Special Lecturer form for lecturers who are U.S. citizens or permanent resident aliens. This is a one-time requirement for the payee, unless a change (i.e. address) has occurred since the initial form was submitted. A W-8BEN is also required for foreign persons. Submit all of the completed forms (as applicable) to Accounts Payable, Administration Room 116, Mail Code 1611. Accounts Payable will disburse the payment after the services have been completed.

Please take note of the Internal Revenue Service (IRS) requirement regarding foreign guest lecturers:

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"If the individual is not a U.S. citizen or permanent resident alien (green card holder), the individual must complete the SDSU Foreign National Information Form and form W-8BEN to determine US tax residency."

If the guest lecturer falls under the above category, the payment request you submit will not be processed by the Accounts Payable Department **until** the required form is completed and approval from the SDSU NRA Tax Reporting Department is obtained by the supplier.

For further questions/inquiries regarding this IRS requirement, please contact:

SDSU Tax Analyst, Controller's Office
Administration Bldg., Room AD 116
tax@sdsu.edu

Payment Options

Purchase Orders: The first and preferred method for procuring goods or services is via the requisition and purchase order process. With the departmental funds allocated to the activity and Org in Oracle in Fund 1018, requisitions should be submitted as usual, through the established workflow for the division. All forms for expenditures during a given fiscal year MUST include the appropriate endeavor value, as noted above.

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 following options are available for SSF ARP funds.

Reimbursements: If you must make a purchase with your own money, you may be reimbursed by submitting an Accounts Payable Direct Payment Request form (DPR) with yourself as the payee. **Approval of the reimbursement must follow the departmental FAH delegation of authority.** Be sure to attach **original itemized** receipts for all such purchases to the Accounts Payable Direct Payment Request form. A Payment Data Record form is not required for faculty or staff.

Advances: When you do not know the exact amount needed, you may request an advance using an Accounts Payable Direct Payment Request form. Advances must be paid back or receipts must be provided within two weeks of return of travel or in the case of an advance for supplies within two weeks of when you receive the funds. Original receipts must be attached to a summary report of all expenditures incurred. The IRA/SSF ARP Cash Advance Summary Report form listing all expenditures along with original receipts attached must be submitted to Accounts Payable along with a check payable to San Diego State University for any unexpended funds. The check will be deposited to the SSF ARP Trust Fund 1018 and credited back to your program account.

Advances will not be issued on an account with an advance still outstanding.
*** The individual receiving the advance is personally responsible for all funds not documented. ***