

Executive Fellowships

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Purpose

Chapter 1, Article 1, Section 7 of the Associated Students Bylaws empowers the Senate to establish during the normal budgetary process, student government scholarships, stipends, grants-in-aid, or reimbursements to elected and appointed student officers for their service to student government. ASI's Policy on Stipends provides appropriate guidance for the determination of stipends in those cases where the objective is to help offset the cost of education. Certain positions, however, represent larger commitments for which the Associated Students, Incorporated finds it desirable to defray living expenses as well. The purpose of the Policy on Executive Fellowships is to delineate these positions by title and articulate the rationale and method for determining the fellowship amount to be awarded to each.

Policy Statement

The Associated Students, Incorporated recognizes that the offices of President, Vice President, Treasurer, Chief of Staff, and Chief Programming Officer represent full-time commitments. Holding such a position precludes the officers from maintaining regular paid employment. Accordingly, it is the policy of the Associated Students, Incorporated to provide fellowships to these individuals in an amount sufficient to meet the estimated living expenses for a single student living off-campus as published in the current edition of the CSULB Bulletin. This amount shall be reduced by any amount of tuition already paid by the university and is contingent upon the availability of financial resources. The remaining amount shall be amortized over a twelve month period and disbursed on a semi-monthly basis.

Who Should Know This Policy

- | | | |
|--|--|---|
| <input type="checkbox"/> Budget Area Administrators | <input checked="" type="checkbox"/> Elected/Appointed Officers | <input type="checkbox"/> Grant Recipients |
| <input checked="" type="checkbox"/> Management Personnel | <input type="checkbox"/> Program Advisors | <input checked="" type="checkbox"/> Staff |
| <input type="checkbox"/> Supervisors | <input type="checkbox"/> Volunteers | |

Definitions

For purposes of this policy, the terms used are defined as follows:

Term	Definition
Executive Officer	Those positions described in the Associated Students Bylaws as President, Vice President, Treasurer, Chief of Staff, and Chief Programming Officer
Fellowship	An amount paid or allowed to, or for the benefit of, an individual to aid in the pursuit of study or research. The term includes the value of contributed services and accommodations (room, board, laundry services, etc.) and the amount of tuition, matriculation, and other fees that are furnished or remitted to an individual to aid in the pursuit of study or research

Regulations

1.0 Basic Qualifications for Fellowship

To be considered for an Executive Fellowship, officers must conform to the following basic eligibility requirements as articulated in the CSULB Regulations for Campus Activities, Student Organizations, and the University Community:

1.1 Unit Load

Officers who are undergraduate students must earn six semester units for credit per semester while holding office. Graduate and credential students must earn three semester units of credit per semester while in office.

1.2 Maximum Allowable Units

Officers who are undergraduate students are allowed to earn a maximum of 150 semester units or 125 percent of the units required for a specific baccalaureate degree objective, whichever is greater. Graduate and credential students are allowed to earn a maximum of 50 semester units or 167 percent of the units required for the graduate and credential objective, whichever is greater.

Officers holding more than the unit limits specified above will no longer be eligible for an Executive Fellowship, with the exception of those who have been declared eligible by the Office of the Dean of Students.

2.0 Public Notice

Associated Students, Incorporated shall make public a description of the fellowship program and requirements prior to the first day of filing for student body elections. Notice shall be given via press releases and/or advertisements placed in campus publications with broad distribution to CSULB students, such as the campus newspapers.

3.0 Terms and Conditions of Fellowship

Following election or appointment to office, the terms and conditions of the Executive Fellowship shall be specified in a written Fellowship Agreement signed by the Executive Officer, the Assistant Director for Student Leadership and Involvement, and the ASI Executive Director. Standard terms and conditions are outlined below.

3.1 Terms of Appointment

The standard term of appointment shall be for one year (12 months) starting June 1 or on the first of the month in which the Executive Officer begins performing the duties and responsibilities of the position.

3.2 Fellowship Award

ASI will provide a Fellowship in the amount specified under the Policy Statement. Fellowships shall normally be paid in equal semi-monthly installments at the 15th and end of the month. The Associated Students, Incorporated shall provide office space and furnishings, administrative assistance, and necessary supplies.

3.3 Duties and Responsibilities

Executive Officers shall be held accountable for the timely and satisfactory performance of duties and responsibilities articulated in the A.S. Bylaws, ASI Policy Statements, Working Rules, and other ASI documents.

3.3.1 Executive Transition

Should an Executive Officer fail to provide a mandatory transition period as prescribed in the Bylaws, his/her remaining fellowship awards shall be forfeited. Executive Officers who are re-elected to a successive term shall be exempt from this provision.

3.4 Office Hours

Executive Officers shall be required to maintain a minimum of 25 office hours per week. This shall including time spent in meetings directly related to the responsibilities of the respective position as documented in the A.S. Bylaws and other governing documents of the campus. At least half of the office hours must be spent in the office. All office hours must be recorded with the Assistant Director for Student Leadership and Involvement.

3.5 Reports

Executive Officers shall provide on no less than a monthly basis oral reports to the Senate that describe the officer's on-going activities and accomplishments. In addition, Executive Officers shall provide to the Associated Students a written end-of-the-year, 2000-word-minimum report that presents the findings and conclusions from the study and research as well as what they learned while serving in their respective executive officer positions during the fellowship; the Executive Officers shall submit a preliminary version of this report to the Board of Directors prior to the Board's final meeting. The final version of the report must be submitted to the Human Resources Office no later than May 31. The final May installment of the Fellowship Award will be withheld until the report is submitted and accepted as complete by the Assistant Director, Student Involvement and Leadership. The Executive Officers understand that written reports may be reprinted in the ASI Newsletter or other ASI publication.

3.6 Presentations

Where appropriate and consistent with the Executive Officer's responsibilities, the officer may be called upon to give oral presentations to both on- and off-campus groups. Reimbursement for related travel must be authorized in advance by ASI and will be an allowable expense.

3.7 Orientation

Executive Officers shall be required to participate in an Executive Officers orientation program conducted by the Executive Director during the first two weeks of June. The purpose of the program is to orient and train the officers in the performance of their essential duties and responsibilities.

3.8 Freedom from Influence

The following guidelines are provided to ensure the Executive Officers' freedom from improper influence:

- 1)** The Executive Officer is free to choose his or her assignments consistent with the purposes of the position and is not bound to represent the views or positions of ASI as a condition of the Fellowship, but should call upon ASI for technical information and any other general support required. ASI will not attempt to control or regulate the Executive Officer's independence of thought or service.
- 2)** The Executive Officer may communicate with student and other organizations and is encouraged to seek information from all reliable sources. However, he or she shall not compromise the integrity of the advice and assistance rendered to ASI by permitting undue influence by any organization or individual nor by actions that would suggest such influence.

- 3) The Executive Officer may not accept any other employment or additional reimbursements for services rendered during his or her term of office except as specifically agreed to in writing by ASI. Unusual situations shall be referred to the Executive Director for interpretation and rulings.
- 4) During the term of appointment, the Executive Officer shall not engage in partisan political activities while on-duty at ASI, on ASI premises, or using ASI resources,
- 5) As a condition of the Fellowship, the Executive Officer shall be required to sign a statement declaring adherence to policies and laws governing codes of ethical conduct and conflicts of interest.

4.0 Disclaimers

The following specific disclaimers are made by ASI regarding the Executive Fellow program:

- The designation of an Executive Officer as a Fellow and the execution of a Fellowship Agreement do not constitute an employment contract between the Executive Officer and ASI or any ASI official. During the fellowship, no employer-employee relationship shall exist between the officer and ASI. The conditions of the Fellowship agreement shall be binding on both parties to the extent that both agree in the written agreements.
- ASI's total financial liability for reimbursement to the Executive Officer shall not exceed the agreed upon amount for fellowships as approved by ASI. No person shall have any claim against ASI neither for any other expenses nor for the actions of the Fellow.
- Although it is the intention of ASI to continue this program, circumstances may dictate cancellation at any time. Should this occur, ASI will provide to the affected Executive Officers the balance of any agreed-upon fellowships in one or more amounts.
- In the event of malfeasance on the part of the Fellow as defined by ASI and determined by a vote of the Board of Control, the fellowship award may be immediately terminated.
- In the event that illness, disability, or urgent personal considerations make it temporarily impossible for the Executive Officer to serve, ASI shall continue the fellowship for up to thirty days. Should a leave of longer duration be necessary, the Board of Control shall recommend to the Senate whether to continue or terminate the Fellowship.
- In the event that the Executive Officer voluntarily terminates for other than illness, disability or urgent personal considerations (as determined by ASI), Fellowship payments will be immediately terminated and no additional expenses will be paid.

5.0 Federal Taxation Implications

Associated Students, Incorporated is a corporation exempt from Federal Income Tax pursuant to Section 501(c)(3) of the Internal Revenue Code (IRC).

5.1 Definition of Fellowship

A fellowship grant generally means an amount paid or allowed to, or for the benefit of, an individual to aid in the pursuit of study or research. The term includes the value of contributed services and accommodations (room, board, laundry services, etc.) and the amount of tuition,

matriculation, and other fees that are furnished or remitted to an individual to aid in the pursuit of study or research.

5.2 Taxability of Fellowship

Executive Fellowships are taxable to the recipient. Payments shall be processed through payroll and taxed accordingly.

5.3 US Citizens & Resident Aliens

Students who are considered Resident-Aliens and US citizens for tax purposes must complete an IRS Form W-4. Students may claim exemption from Federal and State taxes as desired. At the end of the calendar year, ASI shall issue an IRS Form W-2 to report the Fellowships that were processed for that individual.

5.4 Non-Resident Aliens

It is important to note that the IRS policies impose more stringent withholding requirements for students classified as Nonresident Aliens. The tax treatment for Nonresident alien students is different than that for students who are Resident aliens and U.S. citizens. The stipends that are paid to Nonresident Aliens with "F," "J" or "M" visas are subject to restricted tax withholding. The recipient is restricted to claiming single regardless of marital status, and may claim either zero or one allowance for federal tax withholding. The stipend will also be subject to state income tax. (Note that there may be an applicable tax treaty that would reduce or eliminate payments otherwise subject to federal withholdings.) At the end of the calendar year, ASI shall issue an IRS Form W-2 to report stipends that were processed for that individual. In the event a tax treaty benefit is taken, an IRS Form 1042-S shall be issued to report the Fellowship portion that was exempt from federal income tax.

5.5 ASI's Reporting of Fellowship

With regard to ASI reporting fellowship grants to the Internal Revenue Service (IRS) via Information return, Reg. 1.6041-3(o) of the IRC states as follows:

Returns of information (Form 1099) are not required with regard to payments to individuals as scholarships or fellowship grants within the meaning of section 117(b)(1), whether or not "qualified scholarships" as described in Section 117(b). This exception does not apply to any amount of a scholarship or fellowship grant that represents payment for services within the meaning of section 117(c). Instead, these amounts are required to be reported as wages on Form W-2.

6.0 Financial Aid Reporting

All fellowships awarded by ASI under this policy shall be reported to the Office of Financial Aid.

7.0 Amendment

These Guidelines were developed by the Board of Control to aid in administration of the Executive Fellows Program and may be amended by majority vote of that body subject to the A.S. Bylaws and related policies.

Forms

The following forms are to be used in the execution of this policy.

Form Name	Purpose	Responsible Office	Approved By	Timeline for Submission
Executive Fellowship Agreement	To confirm the mutual understanding between ASI and the Executive Officer of the terms and conditions of the Executive Fellowship Program	Office of the Executive Director	Executive Officer, Student Government Advisor, and Executive Director	Must be completed within two weeks of the beginning of term of office. No fellowship will be released unless an executed agreement is on file with the Human Resources Office.
Recurring Stipend Request	To request the payment of a stipend to a student on a recurring basis over several months	Human Resources Office	Authorized budget area signatory and the Dean of Students or designee to verify that the student's eligibility has been confirmed	Submit with a properly executed Personnel Action Form at least seven business days before desired date of disbursement