Policy on Centers and Institutes, #S22-297

Abstract

Approximately 150 words on the overall rationale for the policy

University Centers and Institutes (CIs) are interdisciplinary or collaborative units organized around a scholarly, creative, research, education, and/or public service activity. They combine the interests and expertise of individuals, departments, or administrative units, and may draw on expertise of others external to the campus or the Academy. CIs provide clear benefits to the University and are central to the university’s overall mission. They may offer services to constituents beyond the campus community, including individuals and private and public entities. While CIs by their nature and location serve the campus community, their focus is not exclusively internal. The CSU requires each campus to have a policy for CIs that includes how they are proposed, reviewed, and suspended. This policy is SF State’s implementation of the Chancellor’s office coded memo AA-2014-18 on Centers and Institutes.

Policy

I. Purpose and Definition

University Centers and Institutes (CIs) are academic entities established by the University to support activities central to the mission and goals of the University and of specific academic units. CIs foster collaboration within a field or across existing organizational boundaries, around a problem or service that requires and benefits from multiple disciplinary perspectives and add value, breadth, and depth to the activities of existing academic departments and programs. CIs foster instructional and research collaborations, play a major role in the production of new knowledge, disseminate the results of research, scholarly, and creative activities through the production of research, scholarship and creative activities (RSCA), conferences, meetings, and other activities; strengthen graduate and undergraduate education by providing students with training opportunities and access to facilities; and carry out public
and campus service programs related to the organization's mission. CIs may support but may not offer degree programs.

Entities called "centers" whose purpose is to provide services to the university community (including day care centers, learning centers, student centers, computer centers and other such entities as may be so designated by the president) and federal programs called centers or institutes hosted by the university shall not be governed by this policy, though they may be part of a portfolio of programs within a center or institute.

The Associate Vice President for Research and Sponsored Programs maintains a directory of all university approved CIs. University employees shall not use the designation of center or institute for a project of any kind if it has not been formally approved by the president and shall not solicit extramural funding that suggests a center or institute has already been designated or is about to be designated if it does not appear in the university directory of CIs.

The administrator most directly responsible for overseeing the center or institute (dean, associate vice president, or vice president and hereafter referred to as the "appropriate administrator") is responsible for overseeing the operational and fiscal activities of CIs under their jurisdiction. The Associate Vice President (AVP) for Research and Sponsored Programs is designated by the university to oversee compliance with the CSU system-wide and university policies for CIs, maintains the official listing of university approved CIs, and submits required university reports to the CSU Chancellor’s Office. The appropriate administrator reviews all proposals for the establishment of CIs. If the appropriate administrator supports establishment, they shall submit the proposal to the AVP for Research and Sponsored Programs for a policy and compliance review. Once the proposal has passed the policy and compliance review it will be forwarded to the appropriate vice president who then forwards their recommendation to the President for final consideration.

The spirit of this policy is to recognize the important contributions of existing and future Centers and Institutes to the quality of our University and the success of our students, faculty and staff, while acknowledging the extent to which the limited nature of campuswide resources requires responsible and transparent budgeting, reporting and evaluating. The policy emphasizes the importance of consultation involving at least annually the CI director and the appropriate administrator, and at various intervals with the President, an appropriate Vice President, or the Associate Vice President for Research and Sponsored Programs.

II. Naming Conventions

CIs are usually named with a center or institute designation. There is some overlap and flexibility in the distinction between centers and institutes and either may be used. However, the following definitions should be followed to the extent possible, especially for newly proposed CIs.

A university Center usually supports a specialized area of study or public or campus service and involves faculty, staff and students in research, scholarship, education, creative activities, or public service from one or more disciplines, departments, or schools. A center may involve individuals or organizations from outside the university.
A university Institute is a larger unit that typically supports more inter- or trans-disciplinary research, scholarship, education, creative activities, or public or campus service, and involves faculty, staff and students from several departments, schools, or colleges as well as organizations outside the university.

Use of other designations (e.g., laboratory, station, campus) may be considered if an appropriate justification is provided and must be approved by the President.

University approved CIs shall work with Strategic Marketing and Communications to develop official logos and brandmarks that reflect their formal relationship and official standing with the university. Official CIs shall work with university or college webmasters and marketing units to build their websites within the sfsu.edu domain.

III. Directors, Affiliates, and Members

A. Director

Each center or institute will be headed by a director (or executive director). Faculty, administrators, or staff may serve as CI directors. A selection committee will be appointed by the appropriate administrator to recruit and review applications for the director position. The selection committee shall recommend finalists for the director position to the appropriate administrator. The selection committee and appropriate administrator shall follow relevant HR and university policies and procedures in appointing a director. The appropriate administrator shall make the final recommendation for appointment.

B. Advisory Committee

The director may be advised by a standing advisory committee. The advisory committee should have at least three members and include both university and external advisors with expertise related to the mission of the center or institute. The advisory committee should have a clearly defined charge that includes at least one annual meeting to review the annual report and provide feedback on the organization's effectiveness and progress in meeting its goals and objectives. The committee may also recommend criteria for affiliation or changes to the unit's participants and advise the director on major decisions affecting the unit. The chair of the advisory committee, and as many other members as practical, should meet with the five-year and continuation review committees and be available for consultation by the review committees.

C. Affiliates and membership

CIs may have different types of affiliates or members. Examples include:

1. Scholars and research affiliates: SF State faculty (including lecturer and adjunct faculty) and SF State staff; project researchers, scholars, students, and principal investigators; faculty, scholars, and students from other universities and governmental or non-governmental (501(c) 3) organizations who are active collaborators on projects or activities of the center or institute or mentor SF State students in research, scholarly, or creative projects.
2. Industry affiliates: for-profit businesses or companies with a collaborative, membership, or contractual interest related to the mission or activities of the center or institute. They may pay an annual fee and gain defined privileges or services.

3. Public service affiliates: government, non-government, non-profit organizations, and community members who are supportive of the CI's activities and serve in the capacity of university volunteers.

D. Membership contributions

University faculty, staff and student affiliates may request a letter from the director documenting their research, scholarship, education, creative activities, public service, or university service contributions done in collaboration with a center or institute. Letters can be included, but are not limited to the following: for review by department Retention, Tenure, and Promotion (RTP) Committee; annual evaluations.

IV. Administration and Finance

All CIs shall develop a program plan with goals and an annual budget plan. These should be reviewed and revised (as appropriate) at least every five years and be responsive to the recommendations of the five-year and continuation review committee findings and recommendations. The appropriate administrator shall review and approve the annual budget each year, and confirm the space or facilities assigned for use by the center or institute, as part of their annual planning process, and as part of the five-year and continuation review process.

Academic departments and supervising units retain ultimate responsibility for providing any required office or instructional space for faculty who may be affiliated with or working in residence in spaces assigned by the university to CIs.

The director of the center or institute is responsible for leading it in a manner consistent with the goals and objectives in their program plan and ensuring that the operations comply with the policies and procedures of the University and its auxiliaries (i.e., Fiscal Affairs, U-Corp, Enterprise Risk Management, Human Resources, etc.), as appropriate. This may include but is not limited to following university (or unit) guidelines for timely submission of transactions, requesting required approvals, executing agreements, event planning, following procedures for programs involving minors, handling of cash/revenue (as appropriate), appropriate use of funds for intended purposes, activities, and programs. The appropriate administrator is responsible for onboarding and orientation of new directors to relevant administrative policies and practices. Regardless of the funding source(s) supporting the activities and programs of CIs or which unit administers them, the appropriate administrator retains oversight of the organization's operational and fiscal activities and is responsible for compensating the university for any overruns in fiscal year expenditures.

Each Institute or Center director will prepare an annual, balanced budget plan in consultation with the responsible administrator (e.g., a college dean). The plan should include all expenses and revenue sources, including any agreed-upon general fund (GF) and return on indirect cost (IDC return), and any direct grant or contract funds, anticipated donations, endowment fund income, or other funds. University or unit financial commitments should be as predictable as possible but may have a variable component similar to the variation in IDC return and GF.
budget for all units and should be subject to renegotiation during each periodic review or if there is a significant departure from maintaining a balanced budget.

CIs established under this policy vary widely in the specific services and academic value they provide the University. Some support vital university programs or steward priceless and original or unique materials to the benefit of the public, students, and our cultural history. Some may be partially supported by endowments. CIs also vary in their ability to generate revenue or external funding. An acceptable budget plan should be developed by the CI director and the appropriate administrator. Those CIs that can generate revenue, recover costs, or fundraise should set appropriate goals and work toward achieving them in collaboration and consultation with the appropriate administrator and the appropriate university departments (i.e., Development, Marketing, the Office of Research and Sponsored Programs, the University Corporation, the College of Extended Learning, etc.)², with the goal of expanding programs and reducing dependence on general funds.

Financial plans and budget projections should be plausible and university contributions should be formally verified. If an established center or institute has persistent cost overruns it may be recommended for probation or disestablishment through the continuation review process (see section VII). The director may respond to the recommendation for probation or disestablishment with an appeal for an extension, exemption, or exception.

University support to centers and institutes is defined as state general fund budget allocations for release time, salary, benefits, student positions, equipment, and other operational expenses associated with the activities and programs of the center or institute.

Campus-owned space should be assigned to the CI unless an alternative arrangement is necessary and is agreed upon. The space may be assigned directly by the Vice-Presidential Unit, such as Academic Affairs, or may be assigned to a unit such as a college and designated for the CI. The basic and scheduled maintenance of space and facilities assigned to the CI should be treated like space assigned to any academic department or other unit. Alternative arrangements include space that is rented by the University and used by the CI. In this case, the agreement should specify how rent and maintenance are provided, ordinarily through a University commitment.

Each center and institute should be assigned and use a department ID in the university financial management system to support financial planning and reporting. The financial staff from the supervising administrative unit shall help train directors in how to generate reports of actual revenues and expenses from the financial management system used by the university (currently the Financial Data Warehouse).

University Advancement, the University Corporation, College of Extended Learning, and the Office of Research and Sponsored Programs (ORSP) shall collaborate with university approved CIs to support fundraising initiatives in line with their fundraising priorities. The fundraising plans of the CI are established in consultation with the appropriate administrator.

V. Procedure for Establishment

A. Proposal
At an early stage of development, proposed core participants in the center or institute are encouraged to consult with relevant department chairs and the appropriate administrator(s) that will be charged with its oversight. Proposals should include the following elements:

1. **Name** of the center or institute in accordance with the naming conventions described above. If a name is proposed that does not include center or institute as part of its designation, a request for an exemption with a robust justification must be included.

2. **A program plan** that includes a mission and vision statement, the need for the center or institute including both internal and external needs, goals and objectives, and the relationships with other campus units. The mission and vision should be clearly articulated with those of the university.

3. **A description of the major proposed research, scholarship, education, creative activities, or public/campus service programs** and how they relate to the goals and objectives of the unit and the university.

4. **An impact evaluation** that describes the added value and capabilities to be brought to the university and the supervising unit by the center or institute and an explanation of why they cannot be achieved within existing academic units. Include a description of how the unit will make substantive and effective contributions to equity, inclusion, and diversity in the context of its goals and in its administration.

5. **Educational programs and curricular offerings.** Include an academic rationale for the need of the center or institute to collaborate with Academic Affairs, the College of Extended Learning, or the University Corporation in the offering of courses, trainings, or workshops. Such programs may include credit-bearing and non-credit bearing classes, internships, and research- and servicelearning related opportunities. However, CIs shall not offer degrees independently of academic departments and programs. The proposal shall provide evidence that any academic programs that might be affected have been consulted and that they approve of the educational plan.

6. **A three-year budget projection.** The projection should include anticipated revenues (including sources, amounts, and duration) and expenses. The projected budget must be plausible. If any seed funding or other financial contribution is included in the budget projection, a letter verifying the intent to commit those funds from the appropriate administrator must be included. New Centers and Institutes must provide a plausible plan, as a part of the chartering process, for becoming financially independent of general fund sources within three years of beginning operations.

7. **Personnel and Key Participants.** Identify and describe the roles of all key personnel, including administrator(s), faculty members, students, staff, community members, and advisory committee members that will be affiliated with the proposed center or institute. Include the names of faculty, affiliates, and members who agree to participate in the unit’s activities (may include students). Also include a projection of the numbers
of students, volunteers, and any other personnel anticipated to be involved in the activities of the center or institute.

8. **Advisory committee.** Provide a list of proposed advisory committee members including any ex-officio members and a description of the structure and charge of the committee. The advisory committee should have at least three members and include both university and external advisors with expertise related to the mission of the center or institute. The majority of advisory committee members should be university employees.

9. **Organizational chart and governance plan.** An organizational chart shall be provided which includes all university personnel and participants, the relationships between them, and all significant relationships with external entities or units. The chart should illustrate the administrative reporting structure and the relationship with academic programs. A narrative description should be included to further describe or clarify organizational relationships and the governance plan.

10. **Other resources (including space allocation).** Clearly describe the proposed university space and facilities allocations to the center or institute. This should be developed in consultation with the appropriate administrator and include realistic projections of future space needs if growth is anticipated. List the specific buildings, rooms, and any outdoor space or facilities. Outline any other necessary university resources, including equipment and technology requirements.

11. **Letters of support.** Include letters of support from all faculty, affiliates, members, and advisors listed in the proposal. There should also be evidence of support on the part of campus programs or units which may expect to be significantly affected by the unit’s activities – e.g., programs or units whose areas of activity overlap with those of the proposed unit, or with which the proposed unit will be expected to work closely in any way or may provide other resources. Evidence should be in the form of a letter of support for the establishment of the center or institute and include any resource commitments.

12. **Organizational documents, if any.** Outline any organizational documents that must be created to enable the creation of the center or institute, for example any Memoranda of Understanding or Agreement that are needed with an external entity or with the campus or CSU system.

B. **Review Process**

The proposal is submitted via the department chair(s) or school or program director(s) of the faculty who developed the proposal to the appropriate administrator(s) most directly affected by the proposed center or institute. After review and approval at these levels, the proposal is forwarded to the AVP for Research and Sponsored Programs for a policy and compliance review. It will then be forwarded to the supervising vice president who will make a recommendation to the President. The President has the ultimate authority to establish a center or
VI. Annual Report and Review

By November 1 of each year, CIs submit a report (see Appendix I) summarizing their activities for the past fiscal year to the appropriate administrator charged with oversight of the unit. The advisory committee chair may be consulted in the preparation of the report.

The appropriate administrator will meet with the director to review the annual report and may provide written requests for amendment before recommending approval and submission to the AVP for Research and Sponsored Programs. The AVP for Research and Sponsored Programs will review the report for compliance with university and system-wide policies and may make recommendations for amendment to the appropriate administrator and director before approving the annual report. The approved report will be forwarded to the supervising vice president. The AVP for Research and Sponsored Programs, the appropriate administrator, and the appropriate vice president will determine if a meeting with the director is required to review and discuss the report, the program or financial plan, or to address any regulatory or compliance issues.

VII. Five-Year and Continuation Review

Centers and institutes shall be formally and comprehensively reviewed at least once every five years. A continuation review may be initiated by the appropriate administrator at any time. The review considers the center or institute's accomplishments and challenges in supporting its mission, its performance in meeting goals and objectives, and its adaptation to changing internal and external circumstances. The director's performance is reviewed through the appropriate university HR policies and procedures and is not within the scope of this review. CIs must outline how they have worked to implement their missions with the resources available and how their work supports the mission of the University. Proposed changes to space allocation or other university support shall also be reviewed.

The report should speak to both the strengths and weaknesses of the unit. Accomplishments should be recognized, but the committee may wish to recommend changes in organization and policy or even recommend probation or disestablishment of the center or institute if it is no longer fulfilling its mission or is unable to maintain an adequate level of academic, campus, or public service activities.

Justification for continuation, probation, or disestablishment of a center or institute should be well grounded. Such a recommendation should consider the history of the center or institute, its campus and community context, and how it serves the larger mission of the university. The review committees should consider and make specific recommendations on a full range of possible alternatives or modifications to the program or financial plan, goals and objectives, and the allocation of university space and any other resources. It may recommend a merger with one or more other units, revised qualifications for affiliation or membership, adjustments to the organizational structure, or a probationary period.

Directors are typically appointed for a five-year period, coinciding with the standard review period. A director is normally limited to a maximum of three reappointments. The five-year or
continuation review should be considered by the appropriate administrator in their performance evaluation of the director. The review committee may provide a memo to the appropriate administrator that provides feedback on the effectiveness of the director in leadership, stewardship, and management of the center or institute.

The financial well-being of the unit must be carefully considered to assure the continued success of the mission of the center or institute and its relevance to the university mission, its students, and the opportunities and training that the center or institute provides. The reviewers should include assessments of the planning efforts undertaken by the center or institute and recommend whether a strategic plan should be developed in collaboration with the appropriate administrator.

A. Review Process

1. The appropriate administrator supervising the center or institute coordinates all aspects of the review; this includes coordination and distribution of all relevant documentation to the reviewers including annual reports for the period under review to the reviewers. The appropriate administrator appoints a review committee of at least seven reviewers. The composition of the committee shall include at least three faculty members (one familiar with grants and contracts), at least one director of another center or institute (may be faculty or administrator or staff), at least two administrators, and the AVP for Research and Sponsored Programs.

2. The review committee is provided with a charge by the appropriate administrator and AVP for Research and Sponsored Programs. It may include a charge to assess the currency and importance of the center or institute to the unit or university mission or to assess its financial status. The review committee should examine the annual reports covering the period under review, the website, and any social media platforms. They interview the director, advisory committee members, affiliated faculty, staff, and students, the appropriate administrator, and any other individuals identified by the review committee as pertinent to the review, potentially including non-SF State faculty, external affiliates, members, or volunteers and personnel. Before the interview, the review committee develops a set of questions that they share with the director. Among the topics or questions to be posed by the review committee, a focus should be maintained on how the center or institute is implementing its mission. The review committee may tour the physical facilities if this is included in the charge for the review (may be done virtually). The responses to the interview questions and the results of the facilities tour (if any) are summarized by the review committee. The committee submits a report of its findings and recommendations to the appropriate administrator, including its recommendation regarding continuance, probation, or disestablishment of the center or institute (see section VIII).

3. The appropriate administrator meets with the director to discuss the report findings and recommendations. The director may opt to submit a written response to the report findings and recommendation within two
weeks of meeting with the appropriate administrator. This response shall be included in the review documentation.

4. The appropriate administrator sends their recommendation and the review documents to the AVP for Research and Sponsored Programs to ensure consistency with relevant university policies. It is then forwarded to the supervising vice president. In consultation with the relevant administrator(s), the supervising vice president considers the comprehensive findings and recommends to the President whether the center or institute should be continued, placed into a probationary period, or discontinued. The appropriate administrator also makes a recommendation for the reappointment, reassignment, or non-retention of the director.

VIII. Procedure for Disestablishment or Probation

Five-year and continuation review committees recommend, among other things, continuation, probation, or disestablishment of centers and institutes. In addition, a director with the concurrence of their advisory committee may recommend disestablishment.

A recommendation to disestablish a center or institute receives careful review by the director, advisory committee, department chairs, directors of other centers and institutes that would be affected by the disestablishment, relevant appropriate administrator, and the AVP for Research and Sponsored Programs. A probationary period with clear benchmarks for continuance may be recommended by the appropriate administrator prior to a recommendation to disestablish a center or institute.

After reviewing comments from all the committees and members of the advisory committee, and if the appropriate administrator concurs with the recommendation that disestablishment is the best course of action, then the appropriate administrator shall recommend disestablishment to the AVP for Research and Sponsored Programs who then forwards the request to the supervising vice president. The vice president reviews the request and the justification for disestablishment and then forwards their recommendations to the President.

The President has the final authority on establishment or disestablishment of centers and institutes. If the President concurs with a recommendation to disestablish a center or institute, then they will write a letter formally disestablishing the center or institute that includes the supporting rationale.

Any Center or Institute may be discontinued at any time by consultation and mutual agreement among the Academic Senate Executive Committee, the CI director, CI personnel and the University administration.

IX. Procedure for Name Change

The request for a new name usually reflects new directions in the research or scholarly and creative activities, the expansion or addition of new knowledge or fields of research and scholarship to the unit's mission, or the institutionalization of new methodologies of study.
Procedure for Name Change:

1. The Director, after consulting with the advisory committee, prepares a proposal describing the rationale for requesting a new name for the unit and submits the proposal to the appropriate administrator. The appropriate administrator submits the proposal for the name change to the AVP for Research and Sponsored Programs for review and comment.

2. The AVP for Research and Sponsored Programs and the vice president supervising the unit review the request; and if approved, will forward the recommendation for the name change to the President for final approval.

Appendix I: Annual Report

The annual report for CIs shall include the following elements:

1. **Executive summary of activities and accomplishments.** Summarize and describe activities and accomplishments in a manner that is accessible to the public. Where relevant, such activities and accomplishments should reflect on the local, regional, statewide, national, or international impact of the center or institute.

2. **Organization and Structure.** A description of the current organization and structure of the center or institute, including any changes that may have occurred since the last annual report in leadership, affiliates, members, advisory committee members.

3. **Research, scholarship, creative activities, and public service.** A brief narrative summary of the contributions of all affiliates and members to the goals and objectives of the unit in research, scholarship, or creative activities and public service. Include descriptions of any seminars, workshops, conferences, trainings, presentations, internships, public service activities or other relevant programs offered by the center or institute.

4. **Educational programs and curricular offerings.** Summarize the educational or curricular programs and activities if the unit collaborates with Academic Affairs (or specific colleges, departments, or programs), the College of Extended Learning, or the University Corporation to offer courses, trainings, or workshops.

5. **Media engagement.** Summarize any media engagement including articles published or reports made in the popular press concerning the work of the unit, and provide a description of its social media presence, reach and strategy.

6. **Financial report.** A detailed itemization of fiscal activities that includes all sources of actual revenues and expenses. The report should clearly identify any approved budget allocations from the university and any direct costs and indirect cost recovery to the university from the unit’s grant and contract activities, the dollar amount of indirect cost returned to the unit (IDC return), income from endowments, private gifts, foundations, etc. Financial data should be sourced from the university’s financial management system. Include a general description of the fiscal status of the center or institute.

7. **Space allocation, facilities, and specialized equipment.** A summary of the space allocated, and any special equipment or core (shared) facilities currently operated by the unit. Include a description of the condition of these and any anticipated needs or changes in occupancy or usage.
8. **Self-Assessment.** A general assessment shall be provided of how the activities of the center or institute are accomplishing its mission, goals, and objectives. It shall include an assessment of how the unit has contributed to equity, inclusion, and diversity in the context of its goals and in its administration. This section should include any recommendations or feedback provided by the advisory committee and how the unit responded. Assessment should be directly related to the program plan submitted in the initial proposal or as subsequently revised or updated. If there have been any changes to the goals or objectives of the center or institute, these must be stated clearly.

9. **Appendices.** Include tables of:
   a. Advisory committee members including names, titles, and organizational affiliations.
   b. Faculty affiliates engaged in the unit's research, scholarly, education, or creative activities, or public service activities including names, titles, and department or program affiliations.
   c. Graduate and undergraduate students and postdoctoral fellows contributing to the unit who are on the unit's payroll, participate through assistantships, fellowships, or traineeships, or are otherwise involved in the unit's work including their names, class standing or position, and department or program affiliations.
   d. Visiting faculty, scholars, or practitioners from other universities or organizations participating or collaborating in projects or activities of the center or institute including their names, titles, and affiliations.
   e. Industry, governmental, and non-governmental organizations participating in or collaborating with the work of the center or institute and a description of the activity or project.
   f. Publications developed by the unit, including books, journal articles, and reports, and reprints or white papers issued under its own covers.
   g. New grants and contracts awarded to the unit during the current fiscal year.

10. **Additional information.** Include any other information deemed relevant to documentation of a unit’s achievements.

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1 The University is responsible for basic maintenance and operation of the physical space(s) they own or formally to assign to CIs for their use.
2 Sources of revenue to CIs may include income from endowments, gifts, grants, contracts, recovered indirect costs as per established university financial policy, programs fees, membership fees, etc. Recovered indirect costs (IDC or F&A) are those that are incurred for common or joint objectives and therefore cannot be identified readily (https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/appendix-Appendix%20III%20to%20Part%20200). Recovered IDC will be distributed per the university's IDC distribution policies and practices. The amount of recovered IDC generated by the activities of the center or institute should be considered in evaluating its financial status.

**History**

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RSO Guidelines (available at [https://research.sfsu.edu/rso_policy](https://research.sfsu.edu/rso_policy)) and amended at the direction of the senate executive committee charge to develop a senate policy on RSOs and to address the recommendations of the University Budget Committee's RSO Working Group Report, approved by the UBC, December 2020.