

# **Guidelines for Complying with Executive Order No. 794 Financial Management of Extended Education**

Cal Poly State University  
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## **What is EO 794?**

EO 794 is an executive order issued by the CSU Chancellor's Office in November, 2001. It regulates the financial management of instructional, self-support programs and provides specific instructions to the campuses concerning what programs are covered under this executive order and how funding for these programs will be handled.

## **To whom/what does EO 794 apply?**

EO 794 applies to all employees and units of the University, including academic departments, centers and institutes, individual employees, and any organizational unit that may undertake the instructional activities covered by this executive order. It also applies to student clubs under certain circumstances.

## **What activities are covered under EO 794?**

EO 794 covers all self-support educational/instructional programs that use the name of the California State University, Cal Poly, or any unit of Cal Poly, either explicitly or implicitly.

## **What is meant by self-support?**

Self-support means that the activity is not supported by the "general fund" (State-allocated funds). Funding may come from a variety of other sources (e.g. contracts, grants, registration fees, gifts).

## **How do I ensure that my project/activity is in compliance with EO 794?**

To ensure that your or your unit's project/activity is in compliance with EO 794, it **must** be proposed to either the Grants Development Office (Bldg. 38, Rm. 152; Ext. 6-2982) or Cal Poly Continuing Education Dean's Office (Jesperson Hall, Ext. 6-7434).

**In general, conferences, workshops, seminar series, institutes and like activities will fall under EO 794 and should be submitted to Cal Poly Continuing Education.** Such activities can be recognized by their having one or more of the following characteristics:

- they award or offer academic credit
- they award or offer Continuing Education Units (CEUs)

- they involve collection of fees from individual participants (even if these do not cover the full cost)
- they are advertised broadly
- they involve a variety of speakers drawn from different locations/organizations
- their primary purpose is to update the knowledge and skills of working professionals (professional development)
- they involve more than 25 participants (audience).

These will most likely be administered by Cal Poly Continuing Education. Cal Poly Continuing Education will determine if the program must operate through the continuing education revenue fund (CERF).

**Activities/projects with any of the following characteristics should be submitted to the Grants Development Office:**

- they include, but do not consist solely of, educational/instructional activities (hybrid projects)
- they have a federal or state agency as the sponsor
- they consist of highly specialized/customized training provided to a small number of individuals, either on or off campus, usually on request.

Projects submitted to the Grants Development Office that do not meet the definition of “Continuing Education” under EO 794, or any other CSU or Cal Poly policy, will be handled as sponsored projects and administered by Corporation Sponsored Programs. “Hybrid” projects will be processed jointly by the Grants Development Office and Cal Poly Continuing Education, and administered jointly by Sponsored Programs and Cal Poly Continuing Education, in accord with EO 794 and other relevant policies or procedures.

### **What if I am not sure where to submit my activity/project?**

If you are uncertain about where to submit your activity/project, you may submit it to either the Grants Development Office or Cal Poly Continuing Education. The office that receives your proposal will review the proposed activities/projects and determine the appropriate administrative office.