### Instructionally Related Activities:
**Proposal for New Recognition—Effective Fiscal Year 2020-2021**

**PLEASE READ BEFORE COMPLETING THIS PROPOSAL**
Instructionally Related Activities (IRAs) are extra-curricular activities that are integrally related to formal instructional offerings or developmental opportunities at Cal Poly. IRAs are intended to enhance student learning and/or enrich the student experience. Please note: The university recognizes two distinct categories of student organizations: clubs and Instructionally-Related Activities (IRAs). Each enjoys recognition by the university but has unique sources of funding. Student organizations are assigned to only one of these categories based upon their purpose and funding. Therefore, a group that currently functions as a student club will lose its club status and associated funding if it receives IRA recognition.

Please keep your answers concise. Attach supporting documentation if applicable—web pages, newspaper articles, etc.

<table>
<thead>
<tr>
<th>1. Proposed Activity Name</th>
<th>National Grocers Association Student Case Study Competition</th>
</tr>
</thead>
</table>

#### 2. Proposer/Advisor (Cal Poly Faculty or Staff Member)
- **Richard Volpe**
- **Name**
- **Department/Unit**
- **E-mail Address**

<table>
<thead>
<tr>
<th>Associate Professor</th>
<th>Title</th>
<th>CAFES</th>
<th>College/Division</th>
<th>805-756-5030</th>
<th>Phone Number</th>
</tr>
</thead>
</table>

#### 3. Category
Select the category that best matches the proposed activity.

- **College** — Activity will tend to draw participants from the college and be aligned with the objectives of one or more academic departments or programs.
- **Student Affairs** — Activity will draw participants from the broad campus community and be aligned with the objectives of one or more departments or programs within Student Affairs.
- **University Interest** - Activity will draw participants from the broad campus community and be aligned with the objectives of one or more academic departments or programs. The activity will not be directly aligned with Student Affairs.
4. Purpose and Goals
a. What is the purpose of the proposed activity? The purpose is general and should be consistent from year to year. For example: To provide students with the opportunity to develop and present business plans in competition with students from other institutions of higher learning.

The purpose of this IRA is to provide Cal Poly students with the opportunity to participate in the National Grocers Association (NGA) student case study competition. The competition provides students with the opportunity to develop and present solutions to challenges posed by retailers in competition with other teams representing colleges and universities across the U.S. Moreover, students attending the NGA show have multiple opportunities to network with industry professionals, attend educational sessions, and visit with industry mentors assigned to them by NGA.

b. How does the purpose of the activity align with the mission of your department, college, division, or university?

In the spirit of learning by doing, students work on real problems affecting the grocery industry, using data and resources provided by the participating companies. Students engage in data analysis, write up their findings, prepare PowerPoint presentations, conduct surveys, interview industry professionals, and estimate program costs and benefits, among other tasks. All of these activities are aligned with the training that AGB students receive in order to prepare them for challenging and rewarding careers in the food supply chain.

c. Briefly state one to three goals for this IRA. These may change from year to year. Make it clear how, through these goals, the activity will accomplish its purpose. For example, in the purpose stated above, one goal may be to send a team of students to a particular conference to compete against teams from other universities.

1. To prepare a case study in response to the prompt provided by NGA for the annual Student Case Case Study Competition.
2. To send a team of Cal Poly students to compete in the NGA Student Case Case Study Competition.
3. __

5. Learning Outcomes
For each goal listed in section 4c, provide up to three outcomes for what students will know, be able to do, or come to value as a result of their participation in the IRA.

Please refer to the guidelines How To Write Learning Outcomes on the Academic Programs IRA page for help in formulating these.

As a result of participation, students will:

Goal 1, outcome 1.1: Locate, collect, and analyze primary and secondary data
outcome 1.2: Conduct a financial analysis to measure the feasibility of the proposed solution
outcome 1.3: Prepare a formal presentation of the proposed solution, complete with supporting materials and handouts for the judges

Goal 2, outcome 2.1: Defend the proposed solution when answering questions posed by industry judges at the NGA show
outcome 2.2: __
outcome 2.3: __

Goal 3, outcome 3.1: __
outcome 3.2: __
outcome 3.3: __
6. Assessment Plan
Describe how you will assess the learning outcomes of this proposed activity. Results will be reviewed in future continued funding proposals, should this activity be recognized as an IRA.

a. Which learning outcomes from section 5 above will you be assessing? e.g. 1.1, 2.3, and 3.2? 1.1, 1.2, 1.3, 2.1, 2.2

b. Check the assessment methods that will be used to determine to what degree participating students met the intended learning outcomes provided in section 5.

- Student Focus Groups / Interviews
- Rubric-based evaluation of artifacts/performances
- Student Surveys
- Other – describe ______

c. When do you plan to gather this data? During and within the week following the competition.

7. Instructional/Program Affiliation. IRAs must be related to a formal program or instructional offering at Cal Poly. See Executive Order #429 on the Academic Programs IRA page. List one or more courses, majors, or other type of program where the subject matter supports the activities or goals of the proposed IRA. For example, the subject matter taught in Materials Engineering and Civil Engineering support the design work for the Steel Bridge competition IRA. Note that IRA funds cannot be used to cover course or program expenses.

Courses, majors, or programs: AGB404: Food Retail Management
AGB327: Agribusiness Data Analysis
AGB463: Senior Project - Agribusiness Consulting

8. Estimated Involvement
Number of students projected to be active participants in this activity from each college
CAFES ___ , CAED ___ , OCOB ___ , CENG ___ , CLA ___ , CSM ___

9. Club Status. Note that an activity cannot be both an ASI-recognized club and an IRA. If an existing ASI club is recognized as an IRA, it will lose its club status and funding.

Is the proposed activity currently recognized as an ASI club? Yes/No No
If Yes: Name of club N/A
Why do you wish to change to IRA recognition? N/A
Will the activities of the club be changed in any way? Yes/No N/A
If Yes: How will the activities change? N/A

Revised by Academic Programs: December 2019
10. Approvals. All signatures are required. Forms with missing signatures will not be considered by the committee.

By signing below, I confirm that this activity is aligned with the academic mission(s) of the department, college, division, or university, and that I will advise/supervise/support these activities consistent with university policies and procedures.

[Signature]
Proposer/Advisor signature (from section 2) 1/20/20
Date

By signing below, we confirm that this activity is aligned with the academic mission(s) of the department, college, division, or university, and that we will assign university faculty and/or staff to supervise these activities in a manner consistent with university policies and procedures.

[Signature]
Department Chair/Head or Program Director
(Name) 1/20/20
Date

[Signature]
Richard Cavaletto
College Dean/Associate Dean/Vice President
(Name)
Date

For more information, see the IRA page at Academic Programs and Planning
https://academicprograms.calpoly.edu/content/IRA/index

Important dates:
Proposal and Budget Forms, with all signatures, are due to your College Dean’s Office or, for Student Affairs IRAs, the Vice President Student Affairs, no later than end of day on Friday 1/31/2020.

All forms reviewed and approved by Deans and VP Student Affairs are due to Jessica Carson in Academic Programs and Planning no later than end of day on Monday 2/10/2020. Forms may be scanned and emailed to carson@calpoly.edu or sent through campus mail to Jessica Carson, Academic Programs and Planning.

The IRA Advisory Committee will review all proposals and determine recognitions no later than 3/23/2020, after which all proposers, colleges, and VP Student Affairs will be notified.
Proposed IRA Name: National Grocers Association Student Case Study Competition

Department Name: Agribusiness
DEPT ID Number: 004300

Important - Complete this form only if seeking FIRST time recognition.
This proposed budget should demonstrate how IRA funds, if approved, will be utilized. Budget should align with the Purpose and Goals provided in section 4 of the Proposal for New Recognition.

Note: Balances on June 30th in excess of 20% of the year's allocation may require a written explanation and spending plan. Unexpended balances in excess of the 20% may be subject to transfer to division level accounts.

Complete the detailed expense budget below and on the following pages.

Note the two boxes at the top of each category: "Total" and "Portion to be funded with IRA subsidy". Enter your budget values for "Total" where the boxes are shaded slightly darker than the surrounding cells and are surrounded by a thick box. Boxes surrounded by a thin line and not shaded darker are auto-filled from the detailed entries requested for that category.

All categories require "Portion to be funded with IRA subsidy". These may be the same as or less than the "Total".

Expenditure Guidelines are available on the IRA website at http://www.academicprograms.calpoly.edu/content/IRA/ira_budget_guidelines_032405

Detailed Expenses - Uses of IRA Funds

Please provide detailed explanations of planned expenditures. Double click in any box to begin typing.

<table>
<thead>
<tr>
<th>To Program Reserve:</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Portion to be funded with IRA subsidy:</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

Explain below why funds will be held in reserve.
Salaries & Wages:

To whom are salaries and wages paid? What is the role of these individuals for this IRA? Note that salaries, stipends, or wages for faculty, students, or others to participate in IRA programs/activities may not be paid using IRA funds. However, a case may be made to pay employees such as lab technicians or truck drivers to perform tasks essential to the IRA.

<table>
<thead>
<tr>
<th>1. Who/Description:</th>
<th># people</th>
<th># hours</th>
<th>Hourly wage</th>
<th>Total: $0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Who/Description:</td>
<td># people</td>
<td># hours</td>
<td>Hourly wage</td>
<td>Total: $0.00</td>
</tr>
<tr>
<td>3. Who/Description:</td>
<td># people</td>
<td># hours</td>
<td>Hourly wage</td>
<td>Total: $0.00</td>
</tr>
<tr>
<td>4. Who/Description:</td>
<td># people</td>
<td># hours</td>
<td>Hourly wage</td>
<td>Total: $0.00</td>
</tr>
<tr>
<td>5. Who/Description:</td>
<td># people</td>
<td># hours</td>
<td>Hourly wage</td>
<td>Total: $0.00</td>
</tr>
<tr>
<td>6. Who/Description:</td>
<td># people</td>
<td># hours</td>
<td>Hourly wage</td>
<td>Total: $0.00</td>
</tr>
<tr>
<td>7. Who/Description:</td>
<td># people</td>
<td># hours</td>
<td>Hourly wage</td>
<td>Total: $0.00</td>
</tr>
<tr>
<td>8. Who/Description:</td>
<td># people</td>
<td># hours</td>
<td>Hourly wage</td>
<td>Total: $0.00</td>
</tr>
<tr>
<td>9. Who/Description:</td>
<td># people</td>
<td># hours</td>
<td>Hourly wage</td>
<td>Total: $0.00</td>
</tr>
</tbody>
</table>

Grand Total: $0.00
Supplies & Services:

<table>
<thead>
<tr>
<th></th>
<th>Total:</th>
<th>Portion to be funded with IRA subsidy:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Explain below how these supplies and services support, or will be used for, the activities of this IRA.

Provide below a detailed list of supplies & services and costs for each. Attach additional sheets of necessary.

<table>
<thead>
<tr>
<th>Item &amp; purpose:</th>
<th>Quantity</th>
<th>Cost each</th>
<th>Total:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Item &amp; purpose:</td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>2. Item &amp; purpose:</td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>3. Item &amp; purpose:</td>
<td></td>
<td></td>
<td>$0.00</td>
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<tr>
<td>4. Item &amp; purpose:</td>
<td></td>
<td></td>
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<tr>
<td>5. Item &amp; purpose:</td>
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<td>6. Item &amp; purpose:</td>
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<td>7. Item &amp; purpose:</td>
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<td>8. Item &amp; purpose:</td>
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<tr>
<td>9. Item &amp; purpose:</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>10. Item &amp; purpose:</td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>11. Item &amp; purpose:</td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>Grand Total:</td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>
**Travel:**

<table>
<thead>
<tr>
<th>Total:</th>
<th>$4,740.00</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Portion to be funded with IRA subsidy:</strong></td>
<td>$2,740.00</td>
</tr>
</tbody>
</table>

Explain below who is traveling, what and where they are traveling to, and why. Then provide a brief description for each category, such as, for Personal Car Mileage: "Drive personal car to Fresno and back" or for Vehicle Rental: "Rent 7 person van to drive team to competition in Los Angeles".

<table>
<thead>
<tr>
<th>Air Travel:</th>
<th>In 2021 the NGA show is in Las Vegas and we intend to fly in order to reduce travel time. The drive, including stops for food, will take at least 7 hours and in order to attend all stages of the event, we estimate it will take an additional 3 hours.</th>
</tr>
</thead>
<tbody>
<tr>
<td># people</td>
<td>6</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personal Car Mileage:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td># people</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vehicle Rental:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td># vehicles</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transportation Other:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td># people</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lodging:</th>
<th>I am listing three people because we will require 3 rooms, for 6 people. 1 room for the advisor and the other 2 for the team.</th>
</tr>
</thead>
<tbody>
<tr>
<td># people</td>
<td>3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Food:</th>
<th>The NGA program includes many meals but I estimate an average of one meal per day per person will not be included.</th>
</tr>
</thead>
<tbody>
<tr>
<td># people</td>
<td>6</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Conference / Competition Fee:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td># people</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other (describe):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td># people</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other (describe):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td># people</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other (describe):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td># people</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other (describe):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td># people</td>
<td></td>
</tr>
</tbody>
</table>

**Grand Total: $4,740.00**
## Expense Budget Summary and Approvals

### USES OF FUNDS

<table>
<thead>
<tr>
<th>Description</th>
<th>Total</th>
<th>IRA Subsidy</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Program Reserve</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Salaries &amp; Wages</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Supplies &amp; Services</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Travel</td>
<td>$4,740.00</td>
<td>$2,740.00</td>
</tr>
<tr>
<td>Other</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Total uses of funds</strong></td>
<td>$4,740.00</td>
<td>$2,740.00</td>
</tr>
</tbody>
</table>

### SOURCES OF FUNDS

<table>
<thead>
<tr>
<th>Description</th>
<th>2020-21 Projected Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested IRA subsidy</td>
<td>$2,740.00</td>
</tr>
<tr>
<td>College/Department discretionary funds</td>
<td></td>
</tr>
<tr>
<td>College-based fees</td>
<td>$2,000.00</td>
</tr>
<tr>
<td><strong>Total sources of funds</strong></td>
<td>$4,740.00</td>
</tr>
</tbody>
</table>

"Provide detailed explanation of "Other" sources of funds.
The National Grocers Association typically provides $2,000 to each competing university to offset travel costs.

I verify this budget report is accurate and submit this proposal to request funding. **Both Signatures REQUIRED**

<table>
<thead>
<tr>
<th>Proposer / Advisor (print)</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1/2/20</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department Chair/Head or equivalent (print)</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1/2/20</td>
</tr>
</tbody>
</table>
Below to be completed during the funding phase in Spring Quarter:

Recommended IRA subsidy: __________________

College Dean / VP Student Affairs / IRAAC co-chair or designate: Richard Cavaletto

<table>
<thead>
<tr>
<th>Name</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Council Chair (college) or ASI President (Univ Interest): Laika Rollin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Signature</td>
<td>Date</td>
</tr>
<tr>
<td>Budget Analyst: Sally Guess</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Signature</td>
<td>Date</td>
</tr>
</tbody>
</table>

Signature indicates projected uses of funds are within expenditure guidelines.