Agenda

1. Welcome and Announcements (President Les Wong & VP Phyllis Carter)
2. Approval of July 27, 2018 Meeting Minutes (VP Phyllis Carter)
3. Budget Planning Objectives (VP Phyllis Carter)
4. 2018-19 Campus Consolidated Budget (Elena Stoian)
5. Enrollment Update: Fall 2018 and College Year 2018-19 Projection (Sutee Sujitparapitaya)
6. Process Improvements (Jesus Garcia)
7. Enrollment Management Strategies:
   - Highlights of Department of Finance Presentation (Maria Martinez)
8. Open Forum; Ten minutes, 3-minute limit per speaker
9. Adjournment; next meeting: Monday, Feb. 4, 2019 at 2:00pm
Welcome and Announcements

Les Wong
President

Phyllis Carter
Vice President & CFO
Administration & Finance
Special Notice: (from CampusMemo)

Budget Town Halls for the campus community:

Wednesday, October 17th in LIB 121
11:30am – 12:15pm
1:00pm – 1:45pm

Thursday, October 18th at the Seven Hills Conference Center
12:00pm – 12:45pm
1:30pm – 2:15pm
Approval of July 27th Minutes

_________________________

Phyllis Carter  
Vice President & CFO  
Administration & Finance
Budget Planning Objectives

Phyllis Carter
Vice President & CFO
Administration & Finance

2018-19 Campus Consolidated Budget

Elena Stoian
Executive Director
Budget Operations & Administration
Administration & Finance
San Francisco State University
2018-19 Consolidated Annual Budget

University Budget Committee (UBC) Meeting
October 9, 2018
AGENDA

• Budget Planning Objectives
• Consolidated Operating Budget
• General Fund Operating Budget
• Financial Aid
• Grants and Contracts
• Auxiliary Units
• Self-Support Units
• Capital Budget
2018-19 SF STATE UNIVERSITY BUDGET PLANNING OBJECTIVES

**Sustainability**
- Balanced budget
- Optimization of “ALL” funding sources
- Capital budget aligned with strategic projects
- Structured prioritization of budget requests
- Financial oversight reviews

**Transparency**
- Publish budget book
- Campus budget forums
- Fiscal and budget training
- Pilot KPIs for A&F

**Engagement**
- Budget process assessment survey
- Shared governance feedback on planned procedure changes
- Collaboration and suggestions for cost efficiency and reduction initiatives
2019-20 SF STATE UNIVERSITY BUDGET PLANNING GOALS

**Sustainability**
- Budget model enhancements
- University wide hiring plan and position management
- Financial resource alignment with strategic, academic and IT plans
- Cost structure analysis and performance targets

**Transparency**
- Management decision support tools/dashboards
- Strategic reserve fund management and targets
- Shared and common cost reporting

**Engagement**
- Formal feedback/response platform
- Optimal space utilization
- Reporting outcomes and savings from cost efficiency and reduction initiatives
2018-19 SF STATE UNIVERSITY CONSOLIDATED OPERATING BUDGET

TOTAL: $568 M

- GENERAL FUND: 67%
- SELF-SUPPORTS: 19%
- OTHER FUNDS: 7%
- GRANTS & CONTRACTS: 5%
- AUXILIARY: 2%

100%
2018-19 SF State University Consolidated Budget Revenues

(In millions)

- Higher Education Fees (1) 218
- State Allocation 180
- Sales & Services of Auxiliary (2) 85
- Gifts Grants and Contracts 28
- Other Financial Sources (3) 28
- Extended Education Fees 16
- Transfers In (4) 5
- Reimb. From Other Funds 4
- Estimate Retirement Adjustment 2
- Revenue from Investments 1

Total $568

Notes:

(1) Higher Ed. Fees: State Univ. Tuition fee, N-R fee, Appl. fee, Std. Health fee, I.R.A fee & Based mandatory fee

(2) Associated Student, Campus Recreation, Housing, Parking, U-Corp, Children Campus

(3) Other Financial Sources: Cost Recovery, Cost Allocation, IDC, misc. fee from various self support

(4) Transfer in: Residential Life & Lottery Fund
2018-19 SF STATE UNIVERSITY CONSOLIDATED BUDGET-EXPENDITURES

(In millions)

- Salaries & Wages: 245
- Benefits: 117
- Operating Expenses: 98
- Financial Aid: 48
- Debt Service Payment: 21
- Campus Services: 17
- Utilities: 12
- Risk Pool: 5
- Transfer Out to Capital/DM: 4
- Open Univ. Reimb to Colleges: 2

Total: $568
2018-19 SF STATE UNIVERSITY GENERAL FUND BUDGET-REVENUES

(In millions)

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount (in millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Allocation</td>
<td>180</td>
</tr>
<tr>
<td>Higher Education Fees</td>
<td>187</td>
</tr>
<tr>
<td>Other Financial Sources</td>
<td>5</td>
</tr>
<tr>
<td>Reimb. From Other Funds</td>
<td>6</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES</strong></td>
<td><strong>$378</strong></td>
</tr>
</tbody>
</table>

Notes:
(1) Cost recovery Open University, cost allocation.
(2) Reimbursement release time, est. retirement adjustment.
2018-19 SF STATE UNIVERSITY GENERAL FUND BUDGET BY CABINET

Total Allocations by Cabinet: $378 M

- Academic Affairs: 39.6%
- Centrally Managed: 44.9%
- Student Affairs & Enroll Mgmt: 4.6%
- Administration & Finance: 8.3%
- Office of the President: 0.5%
- University Enterprises: 0.5%
- University Advancement: 1.6%

Budget by Cabinet:
- GSI and Benefits: $107
- Financial Aid: $48
- Transfer Out to DM: $2
- Other (utilities, insurance, etc.): $13
- Centrally Managed: $170
## 2018-19 SF State University General Fund Budget-Expenditures (In millions)

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount (in millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries &amp; Wages</td>
<td>203</td>
</tr>
<tr>
<td>Benefits</td>
<td>101</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>14</td>
</tr>
<tr>
<td>Risk Pool</td>
<td>5</td>
</tr>
<tr>
<td>Transfer out to DM (1)</td>
<td>2</td>
</tr>
<tr>
<td>Utilities</td>
<td>5</td>
</tr>
<tr>
<td>Financial Aid &amp; Work-study</td>
<td>48</td>
</tr>
<tr>
<td><strong>Total Expenditures</strong></td>
<td><strong>$378</strong></td>
</tr>
</tbody>
</table>

Notes: (1) DM - Deferred maintenance CSU 486

**TOTAL EXPENDITURES: $378 M**
2018-19 SF STATE UNIVERSITY FINANCIAL AID

(In millions)

<table>
<thead>
<tr>
<th></th>
<th>FY2015-16 ACTUALS</th>
<th>FY2016-17 ACTUALS</th>
<th>FY2017-18 ACTUALS</th>
<th>FY2018-19 BUDGET</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>State University Grant</strong></td>
<td>56</td>
<td>51</td>
<td>59</td>
<td>59</td>
</tr>
<tr>
<td><strong>State EOP Grant</strong></td>
<td>2</td>
<td>4</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td><strong>Cal Grant B</strong></td>
<td>26</td>
<td>24</td>
<td>28</td>
<td>28</td>
</tr>
<tr>
<td><strong>Cal Grant A</strong></td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>9</td>
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<tr>
<td><strong>Pell Grant Program</strong></td>
<td>44</td>
<td>44</td>
<td>48</td>
<td>46</td>
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<tr>
<td><strong>Middle Class Scholarship Program</strong></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Notes: Educational Opportunity Program (EOP)
2018-19 SF STATE UNIVERSITY GRANTS & CONTRACTS

Total Revenue: $28.4 M

- Federal Grants & Contracts: 75%
- State Grants & Contracts: 9%
- City Grants & Contracts: 6%
- Non Govt Grants & Contracts: 10%

Total Expense: $28.4 M

- Salaries & Benefits: 47%
- Operating Expenses: 38%
- F&A Cost (IDC): 15%

Notes: F&A = Facilities and Administration
Budget based on FT2017-18 actuals.
FY2018-19 Budget - Revenue

- Associated Students = $9.2M
- Foundation = $1.8M
- University Corporation = $2.8M

Total = $13.8M

- Separate legal entities authorized to provide essential services to the CSU educational programs.
- Fiduciary responsibility to governing boards.
HIGHLIGHTS:
Housing Dining and Conferences Services (HDCS) manages FOUR programs: Student, Employee & Family Housing, and Non-Affiliates, Dining Services and Conference & Event Services, Residential Life.

Notes: Campus Services expense includes services for Facilities, Res Life and IT. Misc. Revenue- Conference & event services and interest.
2018-19 SELF SUPPORTED OPERATIONS-CONTINUING EDUCATION LEARNING

HIGHLIGHTS:
CEL offers academic credit certificates, professional development certificates, bootcamps, individual credit courses, non-credit courses and Continuing Education Units (CEU's). CEL also provides access to SF State courses through Open University, Winter Session and Elder College. CEL offers 421 courses and 47 programs to fit any student’s unique educational needs. Many of these are offered in collaboration with other colleges at SF State.

Total Revenue: $16.8 M

Total Expense: $16.8 M

Salaries & Benefits 54%
Operating Expenses 34%
College Reimb Open Univ 12%
Open University 19%
Cert Program 23%
Degree Program 20%
CEU Credits 11%
Cert Program 23%
Regular Non Credit 9%
Special Session-Other 11%
Misc Revenue 7%
2018-19 SELF SUPPORTED OPERATIONS- STUDENT HEALTH

**HIGHLIGHTS:**
Student Health is comprised of Health Promotion & Wellness (HPW), Counseling & Psychological Services (CAPS), and Student Health Services (SHS)
The services exist to provide comprehensive, best practice responses for our student’s basic needs and well-being. These 3 units engage students to foster resilience and the ability to thrive in support of San Francisco State’s Graduation Initiative efforts.
In FY 2017-18, HPW achieved about 22,500 student contacts, CAPS 3,000, and SHS 24,750.

**Total Revenue: $13.2 M**
- Student Health Fee: 92%
- Pharmacy Revenue: 8%

**Total Expense: $13.2 M**
- Salaries & Benefits: 76%
- Operating Expenses: 24%
HIGHLIGHTS:
Campus Recreation Department offers a variety of fitness and wellness programs and services for the campus community and operates the Mashouf Wellness Center. Besides being open for 115 hours per week during the academic year and 85.5 hours per week during the summer and intersessions, Campus Recreation will offer group exercise classes, massage therapy, personal training, intramural sports leagues, special events, management of sport clubs, outdoor trips, swim lessons, a summer youth camp, and other programming.

Note: I.R.A. athletics instructional related activities campus mandatory fee
HIGHLIGHTS:
The mission of the Athletic Department at San Francisco State University is to provide a broad-based NCAA Division II intercollegiate athletics program that fosters the physical, intellectual, social and emotional development of a diverse and highly skilled group of student-athletes. Intercollegiate athletics are an important part of the heritage and vitality of the University and provide an opportunity for students-faculty, staff, alumni and friends to share experiences, ad by doing so, enhance the cohesiveness of campus life. SF State offers 12 NCAA sports.

Notes: Also Includes Operating Fund (NG001) portion for Athletics
HIGHLIGHTS:
Parking & Transportation supports about 33,000 of combined staff, faculty, and students by providing reasonable parking rates and offering transit options for those who commute to campus through programs and services such as free Shuttle to/from Daly City Bart station and campus, commuter check, RideMatch, and Zipcar in support of the campus’ transportation initiative and to promote sustainable transportation which help reduce traffic congestion and greenhouse gas emissions.
On a daily basis, an average of 2,250 daily permit transactions are being purchased from permit machines and about 2,151 of permit sales sold annually to faculty/staff, auxiliary, student and resident students who park in all campus lots.
HIGHLIGHTS:
Children’s Campus generates revenue from tuition the families pay to receive care for their child. Over the past five years, an average of 443 SF State students spent an average of 6,119 hours at the center each year. For every full-time equivalent child enrolled at Children's Campus, the center touches 6.5 SF State students and contributes 90 hours towards their educational success. In addition to supporting the academic success of these students, Children's Campus hires 30-40 students to work at the center as teacher assistants and substitutes.
2018-19 SF STATE UNIVERSITY CAPITAL BUDGET

2018-19 Top 6 Projects
Total Budget: $61 M

- CA-BECA Replacement Bldg. $51
- Campus Unified Communications Solutions (VOIP) $1
- Campus Deferred Projects $2
- UPN- High Rises Window Replacement $2
- EOS-Seismic Upgrade $2
- ES-PSY Bldg. Elevator Modernization $3

Enterprise Program 14%
SRB 35%
State Appropriation 8%
Financed Eq. Lease 26%
Reserve 17%
Financed SRB 35%

Carryforward Budget: $42 M
Newly Approved Budget: $36 M
FY2018-19 Capital Budget: $78 M

Notes: EOS = Estuary & Ocean Science Center, UPN = University Park North, ES-PSY = Ethnic Studies-Psychology, CA-BECA = Creative Arts – Broadcast and Electronic Communication Arts
Thank You

Administration and Finance
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San Francisco, CA 94132

Phone
(415) 338-2521 Main

Email / Website
pcarter@sfsu.edu
www.sfsu.edu
Enrollment Update:
Fall 2018 and College Year 2018-19 Projection

Sutee Sujitparapitaya
Associate Provost
Institutional Analytics, Academic Resources
Academic Affairs
Enrollment Update
Fall 2018 and College Year 2018-19 Projection

By Sutee Sujitparapitaya
October 9, 2018
Summer Enrollment

Summer Enrollment Trends

Summer (Headcount) Enrollment Trend

<table>
<thead>
<tr>
<th></th>
<th>CA Resident</th>
<th>Non-Resident</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2015</td>
<td>5,172</td>
<td>546</td>
<td>5,718</td>
</tr>
<tr>
<td>Summer 2016</td>
<td>5,817</td>
<td>527</td>
<td>6,344</td>
</tr>
<tr>
<td>Summer 2017</td>
<td>5,922</td>
<td>520</td>
<td>6,442</td>
</tr>
<tr>
<td>Summer 2018</td>
<td>6,017</td>
<td>461</td>
<td>6,478</td>
</tr>
</tbody>
</table>

Summer (FTES) Enrollment Trend

<table>
<thead>
<tr>
<th></th>
<th>CA Resident</th>
<th>Non-Resident</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2015</td>
<td>2,056</td>
<td>229</td>
<td>2,285</td>
</tr>
<tr>
<td>Summer 2016</td>
<td>2,311</td>
<td>221</td>
<td>2,532</td>
</tr>
<tr>
<td>Summer 2017</td>
<td>2,488</td>
<td>227</td>
<td>2,715</td>
</tr>
<tr>
<td>Summer 2018</td>
<td>2,539</td>
<td>189</td>
<td>2,728</td>
</tr>
</tbody>
</table>

Summer 2017 (Headcount) Enrollment by CSU Campus (n>100)

<table>
<thead>
<tr>
<th>Campus</th>
<th>Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Diego</td>
<td>7,509</td>
</tr>
<tr>
<td>San Francisco</td>
<td>6,442</td>
</tr>
<tr>
<td>Bakersfield</td>
<td>1,988</td>
</tr>
<tr>
<td>Fullerton</td>
<td>1,013</td>
</tr>
<tr>
<td>Maritime Academy</td>
<td>658</td>
</tr>
<tr>
<td>Long Beach</td>
<td>434</td>
</tr>
<tr>
<td>Northridge</td>
<td>408</td>
</tr>
<tr>
<td>Fresno</td>
<td>313</td>
</tr>
<tr>
<td>East Bay</td>
<td>310</td>
</tr>
<tr>
<td>San Jose</td>
<td>260</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>259</td>
</tr>
<tr>
<td>Dominguez Hills</td>
<td>224</td>
</tr>
<tr>
<td>Sacramento</td>
<td>122</td>
</tr>
</tbody>
</table>

Summer 2018 Enrollment

<table>
<thead>
<tr>
<th></th>
<th>Headcount</th>
<th>FTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergrad Students</td>
<td>5,485</td>
<td>2,309</td>
</tr>
<tr>
<td>Non-Resident</td>
<td>415</td>
<td>176</td>
</tr>
<tr>
<td>Total</td>
<td>5,900</td>
<td>2,485</td>
</tr>
<tr>
<td>2nd/Post Bacs</td>
<td>38</td>
<td>12</td>
</tr>
<tr>
<td>Non-Resident</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>39</td>
<td>12</td>
</tr>
<tr>
<td>Graduate Students</td>
<td>494</td>
<td>217</td>
</tr>
<tr>
<td>Non-Resident</td>
<td>45</td>
<td>14</td>
</tr>
<tr>
<td>Total</td>
<td>539</td>
<td>231</td>
</tr>
<tr>
<td>Total</td>
<td>6,017</td>
<td>2,539</td>
</tr>
<tr>
<td></td>
<td>461</td>
<td>189</td>
</tr>
<tr>
<td></td>
<td>6,478</td>
<td>2,728</td>
</tr>
</tbody>
</table>
**Fall Enrollment - New Students Only**

![Funnel Diagram Showing Enrollment Process]

### New Undergraduate Transfers

<table>
<thead>
<tr>
<th></th>
<th>Fall 2017</th>
<th>Fall 2018</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied</td>
<td>23,201</td>
<td>15,901</td>
<td>(7,300)</td>
</tr>
<tr>
<td>Admitted</td>
<td>16,889</td>
<td>12,455</td>
<td>(4,434)</td>
</tr>
<tr>
<td>% Admitted/App</td>
<td>73%</td>
<td>78%</td>
<td></td>
</tr>
<tr>
<td>AAO</td>
<td>4,587</td>
<td>4,412</td>
<td>(175)</td>
</tr>
<tr>
<td>% AAO/Admitted</td>
<td>27%</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Enrolled</td>
<td>3,710</td>
<td>3,385</td>
<td>(325)</td>
</tr>
<tr>
<td>% Enrolled/AAO</td>
<td>81%</td>
<td>77%</td>
<td></td>
</tr>
</tbody>
</table>

### First-time Freshmen

<table>
<thead>
<tr>
<th></th>
<th>Fall 2017</th>
<th>Fall 2018</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied</td>
<td>34,521</td>
<td>35,605</td>
<td>1,084</td>
</tr>
<tr>
<td>Admitted</td>
<td>24,327</td>
<td>25,553</td>
<td>1,226</td>
</tr>
<tr>
<td>% Admitted/App</td>
<td>70%</td>
<td>72%</td>
<td></td>
</tr>
<tr>
<td>AAO</td>
<td>5,146</td>
<td>5,306</td>
<td>160</td>
</tr>
<tr>
<td>% AAO/Admitted</td>
<td>21%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Enrolled</td>
<td>4,323</td>
<td>4,288</td>
<td>(35)</td>
</tr>
<tr>
<td>% Enrolled/AAO</td>
<td>84%</td>
<td>81%</td>
<td></td>
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</table>

### New Graduates

<table>
<thead>
<tr>
<th></th>
<th>Fall 2017</th>
<th>Fall 2018</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied</td>
<td>3,719</td>
<td>3,419</td>
<td>(300)</td>
</tr>
<tr>
<td>Admitted</td>
<td>1,424</td>
<td>1,393</td>
<td>(31)</td>
</tr>
<tr>
<td>% Admitted/App</td>
<td>38%</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>AAO</td>
<td>1,140</td>
<td>1,116</td>
<td>(24)</td>
</tr>
<tr>
<td>% AAO/Admitted</td>
<td>80%</td>
<td>80%</td>
<td></td>
</tr>
<tr>
<td>Enrolled</td>
<td>976</td>
<td>953</td>
<td>(23)</td>
</tr>
<tr>
<td>% Enrolled/AAO</td>
<td>86%</td>
<td>85%</td>
<td></td>
</tr>
</tbody>
</table>

Notes: * Fall 2017 Official Census; ** Fall 2018 Preliminary Census
## Fall Enrollment – *All Students* (as of 10/01/2018)

### Headcount

<table>
<thead>
<tr>
<th></th>
<th>Fall 2017</th>
<th>Fall 2018</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Students</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st Time Freshmen</td>
<td>4,323</td>
<td>4,288</td>
<td>(35)</td>
</tr>
<tr>
<td>New UG Transfers</td>
<td>3,710</td>
<td>3,385</td>
<td>(325)</td>
</tr>
<tr>
<td>New PBac</td>
<td>148</td>
<td>174</td>
<td>26</td>
</tr>
<tr>
<td>1st Time Graduates</td>
<td>976</td>
<td>953</td>
<td>(23)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>9,157</td>
<td>8,800</td>
<td>(357)</td>
</tr>
<tr>
<td><strong>Continuing Students</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduates</td>
<td>18,529</td>
<td>18,754</td>
<td>225</td>
</tr>
<tr>
<td>2BA/PBac</td>
<td>176</td>
<td>189</td>
<td>13</td>
</tr>
<tr>
<td>Graduates</td>
<td>1,746</td>
<td>1,831</td>
<td>85</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>20,451</td>
<td>20,774</td>
<td>323</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>26,562</td>
<td>26,427</td>
<td>(135)</td>
</tr>
</tbody>
</table>

### Full-time Equivalent Students (FTES)

<table>
<thead>
<tr>
<th></th>
<th>Fall 2017</th>
<th>Fall 2018</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Students</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st Time Freshmen</td>
<td>3,830</td>
<td>3,884</td>
<td>54</td>
</tr>
<tr>
<td>New UG Transfers</td>
<td>3,125</td>
<td>2,809</td>
<td>(315)</td>
</tr>
<tr>
<td>New PBac</td>
<td>137</td>
<td>170</td>
<td>33</td>
</tr>
<tr>
<td>1st Time Graduates</td>
<td>839</td>
<td>815</td>
<td>(23)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>7,930</td>
<td>7,678</td>
<td>(252)</td>
</tr>
<tr>
<td><strong>Continuing Students</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduates</td>
<td>15,612</td>
<td>16,019</td>
<td>408</td>
</tr>
<tr>
<td>2BA/PBac</td>
<td>100</td>
<td>118</td>
<td>17</td>
</tr>
<tr>
<td>Graduates</td>
<td>1,246</td>
<td>1,256</td>
<td>11</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>16,958</td>
<td>17,393</td>
<td>436</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>22,566</td>
<td>22,712</td>
<td>146</td>
</tr>
</tbody>
</table>

### Average Unit Load (AUL)

<table>
<thead>
<tr>
<th></th>
<th>Fall 2017</th>
<th>Fall 2018</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduates</td>
<td>12.74</td>
<td>12.89</td>
<td>0.15</td>
</tr>
<tr>
<td>2BA/PBac</td>
<td>10.97</td>
<td>11.89</td>
<td>0.92</td>
</tr>
<tr>
<td>Graduates</td>
<td>9.19</td>
<td>8.93</td>
<td>(0.26)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>12.40</td>
<td>12.51</td>
<td>0.11</td>
</tr>
</tbody>
</table>
Assumptions:
- Summer 2018 and Fall 2018 = Preliminary Data
- Spring 2019 New Undergraduates = (Actual Applications * 3 Spring Avg. Application to Enroll Ratio); Spring 2019 New Credentials & New Graduates = Spring 2018 Census
- Spring 2019 Continuing Students = Fall 2018 Enrollment * Continuation Rates; Average Unit Load = Most Recent Year Rate
Process Improvements

Jesus Garcia
Executive Director of Administration
Administration & Finance
DocuSign

Campuswide Electronic Signature Solution for University Business
The Agenda

- Campus Engagement
- 2015 SFSU Strategic Plan – Sustainability Initiative
- DocuSign Program Overview
- Case Studies – Baseline Measurements and Assessments
- Approved Business Processes for DocuSign Use
- Looking to the Future
- Trainings and Upcoming Events
Since Fall 2017, Quality Assurance has performed over 30 DocuSign presentations and reached out to over 350 faculty and staff.

We have been collecting campus feedback through the DocuSign survey to establish baseline metrics and utilize the input we receive to drive our implementation of DocuSign.
A&F Business Processes
Digitization and Process Improvement

Review of A&F Business Process:

- A business process is defined as a practice, procedure, or request associated with an externally available form.
- There is an estimated of **224 A&F business processes**.
- Departments that contain the most number of business processes are Human Resources (70), Fiscal Affairs (62), and Information Technology Services (38).

Through A&F DocuSign Pilot Program,

- Quality Assurance team has already approved **29** of these businesses processes for electronic signature use.
- Quality Assurance also make strategic recommendations for overall process improvement and identify DocuSign features that will match the department & campus needs.

Data Source: A&F Department websites.
Campus Engagement
How do SFSU employees feel about campus processes

Question:
In a 40 hour work week, what percentage of your time at work is spent on coordinating signatures for various documents?

47% of employees spend at least 6 hours.

Question:
77% of employees strongly agree with this statement

Question:
Please indicate whether you agree with the following statement: I consider electronic signatures to be an improvement to our current campus processes.

96% of employees support this initiative.

Question:
How supportive are you of Administration & Finance adopting DocuSign for its forms and processes?
2015 SFSU Strategic Plan
Sustainability Initiative

Resilience

Objectives

1) SF State will become a nationally recognized leader in campus environmental sustainability.

2) SF State will develop philanthropic and entrepreneurial income streams that appropriately support the intellectual work of students, faculty and staff, regardless of state budget decisions, with the goal of bolstering institutional sustainability.

3) SF State will expand and support programs and services that contribute to personal resiliency (e.g., advising, career counseling, health/wellness and tutoring services and programs).

4) SF State will develop its faculty, curriculum, research and programming to become a national leader in mitigating the effects of climate change and fostering community resilience.

Initiatives

Short-Term

+ Create a timeline and set benchmarks for campus sustainability goals that will set the path to ensure that SF State leads the CSU in campus environmental sustainability. Additionally, the University will continue to align our auxiliary investment policies with our environmental sustainability commitments. (Objective 1)

+ Review University forms and business practices to reduce bureaucracy and increase clarity and efficiency. (Objective 3)
What is DocuSign?
Program Overview

- **Who can use DocuSign at SF State?**
  All *faculty and staff* will be able to use DocuSign for University business.

- **What types of documents can DocuSign be used for?**
  DocuSign is approved for Level 2 and 3 data. DocuSign may not be used for documents containing Level 1 (Confidential) data.

- **How can I get a document approved for use in DocuSign?**
  Risk assessment is required for approving documents use in DocuSign. Document owner is responsible to submit a request and initiate the process. Once the request is received, Quality Assurance will complete the risk assessment in consultation with Enterprise Risk Management and Document Owner within 7-10 business days.
Business Plan

Electronic Signature Solution

<table>
<thead>
<tr>
<th>Requirements</th>
<th>DocuSign</th>
<th>Adobe Sign</th>
<th>SignNow (CudaSign)</th>
<th>RightSignature (Citrix)</th>
<th>eSignLive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a Form from an existing PDF</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Parallel routing</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reassignment</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Forms can be routed to users on and off campus</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Branding</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Build electronic form for routing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Force campus Single Sign-on for authentication</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- We have performed a detailed product analysis to determine which vendor best matches our needs;
- Gathered electronic signature requirements for SF State; and
- Interviewed other CSU campuses (San Jose, Cal Poly, Channel Islands, Northridge, Long Beach, Pomona, and San Bernardino) with a DocuSign subscription.

Currently, CSU is exploring the establishment of a Master Enabling Agreement with DocuSign.
Case Study: Invoice Payment Process
Fiscal Affairs

All invoices for goods and services by University departments are processed manually through:

1. Fiscal Services – receive and route invoices for payment approval
2. Accounts Payable – process payment requests

Quality Assurance reviewed a sample of 1500 invoices* dated between July 2015 and December 2015:

<table>
<thead>
<tr>
<th>Current State</th>
<th>Desired State with DocuSign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Turnaround Time</td>
<td>27 days (24 days for invoice approval and 3 days for payment process)</td>
</tr>
<tr>
<td>End-to-end Process</td>
<td>Up to 34 steps</td>
</tr>
<tr>
<td>Incomplete Submission</td>
<td>23%</td>
</tr>
</tbody>
</table>

* Data Source: San Francisco State University Imaging System
Donation to a San Francisco State University Program or Scholarship is a 4-step process. To assess the current state of affairs, Quality Assurance performed a detailed analysis on the following documents dated from January 2014 to June 2018:

1. A sample of 41 University Corporation Gift Agreements*
2. A sample of 150 Special Project Agreements**

*Data Source: Gift Agreements Database.
**Data Source: Special Project Agreements Database.
Case Study: Program Fund and Scholarship Donation

University Advancement & University Enterprises

Current State

<table>
<thead>
<tr>
<th>Average Number of Signatures</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Turnaround Time (days)</td>
<td>15 days</td>
<td>43 days</td>
</tr>
</tbody>
</table>

Total of 58 days

Desired State with DocuSign

<table>
<thead>
<tr>
<th>Average Number of Signatures</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Turnaround Time (days)</td>
<td>Less than 7 days</td>
<td>Less than 21 days</td>
</tr>
</tbody>
</table>

At most 28 days
Benefits to Faculty and Students
Electronic Signature Solution

**Benefits to Faculty:**
- ✓ Provide a streamlined and transparent approval process
- ✓ Allocate resources efficiently and effectively
- ✓ Improve academic support services

**Benefits to Students:**
- ✓ Receive financial support timely, making a college education affordable and increasing access for underrepresented groups
- ✓ Experience a well-rounded education at San Francisco State University
- ✓ Enhance student success through access to high-quality facility
Quality Assurance has performed an initial assessment of campuswide paper consumption and expenses:

- An annual print volume of 6.8 million pages, which costs over $510,000.
- Each employee on campus may print up to 4 reams of paper* per year.

With the implementation of DocuSign, we anticipate that these numbers will decrease significantly. Further study will be required in order to fully understand printing spend on campus and ascertain the precise impact.

* This is calculated based on employee population of 3771 as reported in April 2018.
As of October 2018, 38 business processes and their associated forms are approved for DocuSign use and over 50 documents pending for review.
Advancement is pleased to be part of the initial implementation of DocuSign on campus as this tool will be instrumental in allowing us to bring technology to the forefront to improve our gift agreement signature process (as well as routing our internal forms which will be a huge time saver for staff). The tracking methodology will provide analytics so we may continue our process improvement and enable us to easily identify any issues ... This will help expedite the benefits our students will see from the donations for scholarships and programs on campus.
Looking to the Future
Human Resources

By using DocuSign, we are making the University more efficient and more compliant.

Using DocuSign will help with employee development and student involvement. Students will learn more depth and breadth of Human Resources.

DocuSign is the perfect tool to help the campus be more comfortable with embracing technology.

LaCora Ayala
Interim Associate Director of Operations and Compliance
Responsibilities include managing the operations and budget of Human Resources as well as the compliance program(s) initiated by the Chancellor’s Office; and assisting each unit with process improvement and strategic planning.
DocuSign is a more accessible alternative than our current paper-based forms and it will improve campus efficiency in terms of time and cost. The DPRC is proud to be a partner on this project that will help improve organizational processes and promote the use of accessible documents at SF State.
Looking to the Future
Information Technology Services

"DocuSign will modernize our technology stack, streamline business processes and improve efficiencies across campus."

Nish Malik
Associate Vice President and CIO of Information Technology Services
Responsibilities include providing reliable and secure enterprise-wide applications and infrastructure to support SF State's long standing commitments to teaching, learning, and social justice.
Quality Assurance offers customized DocuSign Zoom trainings to individual departments. Participants will receive hands-on DocuSign education and learn how to use the tool for SF State transactions. Training topics include:

- General navigation of DocuSign
- DocuSign Terminology
- How to create and route documents
- How to assign recipient roles
- How to approve documents
- How to track documents

For more information, please contact Quality Assurance qateam@sfsu.edu.
Questions?

Contact Us

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(415) 405 7339
(415) 338 2717

Email
qateam@sfsu.edu
Enrollment Management Strategies: Highlights of Department of Finance

Maria Martinez
Associate Vice President, Enrollment Management
Student Affairs & Enrollment Management
Enrollment Management
Ongoing and New Strategies

Maria Martinez
AVP for Enrollment Management

University Budget Committee
October 9, 2018
Local Area Outreach Enhancers: Scholarships for SF USD graduates

- Robert and Joyce Corrigan SF Promise
- Endowed Scholarship
  - $2000 each academic year, up to 4 years
  - Any major; HS GPA of 3.0 or above
  - Targeted marketing has increased number of scholarships by 285% over 4-year period
- Elmira Sanderson Endowed Scholarship
  - $1500 each academic year, up to 4 years
  - Any Major; HS GPA of 2.75
CA Resident FTE By Enrollment Status
CA Resident Headcount By Enrollment Status

Enrollment Status
1. 1st Freshmen
2. New UG Transfer
3. New 2nd/ PBac
4. New Graduates
5. Continuing
6. Returning
7. Transitory
8. Unknown
Associate Degrees for Transfer (ADTs)

• 36 ADTs mapped to 87 SF State programs

• Redirected ADT holders from other CSU campuses are admitted into their primary or alternate majors

• Available roadmaps for ADT students transferring into a similar degree program, illustrating how to complete the SF State degree in 60 units
Other Educational Programs and Partnerships

• SSS/Trio Program – 160 low-income, first generation students
• Guardian Scholars Program – 134 former foster youth
• Educational Partnerships – approximately 600 URM students
  • 10,000 Degrees
  • College Track
  • KIPP Schools
  • East Bay College Fund/Oakland Promise
  • Contra Costa County/Richmond Promise
  • Genesys Works
  • San Francisco College Access Center
  • SFUSD Bridge to Success - My Brothers/Sisters Keeper initiative
Ongoing Enrollment Management Strategies

• Nurture relationships with counselors in top feeder high schools and community colleges
• Continue engagement with faith-based organizations to increase enrollment of URM students
• Maintain course equivalencies between SF State and transfer courses from top feeder institution
  → 1000+ new course articulations set up in CS
Fall 2019 Recruitment Season

- Removal of Program Impaction
  - Apparel Design and Merchandising
  - Child and Adolescent Development
  - Dietetics
  - Environmental Studies

- 109 recruitment events scheduled and counting
  - 45 to community colleges
  - 64 to high schools and school districts

- College-based information sheets – coming soon

- New process for Accept Admission Offer

- Sneak Preview: April 6, 2019
New Enrollment Management Initiative: Summer 2019

Student Retention
1ST to 2nd Year Students
New Enrollment Management Initiative: Summer 2019

- Contributes to Annualized FTE
- Promotes student engagement
- Streamlines housing application process
- Helps students be on track for graduation
Other Enrollment Management Strategies On the Roadmap

• Transition to a new Accept-Admission-Offer model effective Fall 2019 cycle
• Increase enrollment of adult students by partnering with the College of Extended Learning in recruitment events
• Increase enrollment by out-of-state students through participation in the National Student Exchange and Western Undergraduate Exchange
• Increase international student enrollment by participating in local, out-of-state and international student college fairs
• Foster existing and upcoming concurrent enrollment programs leading to BS in Nursing degrees
SF State Long Term Enrollment Plan

• Fully optimize local area student enrollment for first-time freshman and transfer levels
• Counties where feeder schools are located
  • San Francisco – 13%
  • Los Angeles – 13%
  • Alameda – 12%
  • San Mateo – 11%
  • Contra Costa – 9.5%
• Increase focus of student recruitment on strengths of SF State academic programs and student services
Longer-term Enrollment Management Goals

What kind of future does San Francisco State University imagine for itself academically?

• Alignment with SF State’s Academic Master Plan
• Timeline:
  o Plan development begins Fall 2018
  o Draft of Plan to be completed by Fall 2019
  o Final plan reviewed every five years
Questions?

Maria Martinez
AVP for Enrollment Management

University Budget Committee
October 9, 2018
OPEN FORUM
Ten Minutes
(Three Minutes Per Speaker)
Next Meeting:

Monday, February 4th, 2019
2:00 PM – 4:00 PM

Thank you for attending.