

University Budget Committee

October 9, 2018



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

FISCAL YEAR 2018-19

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

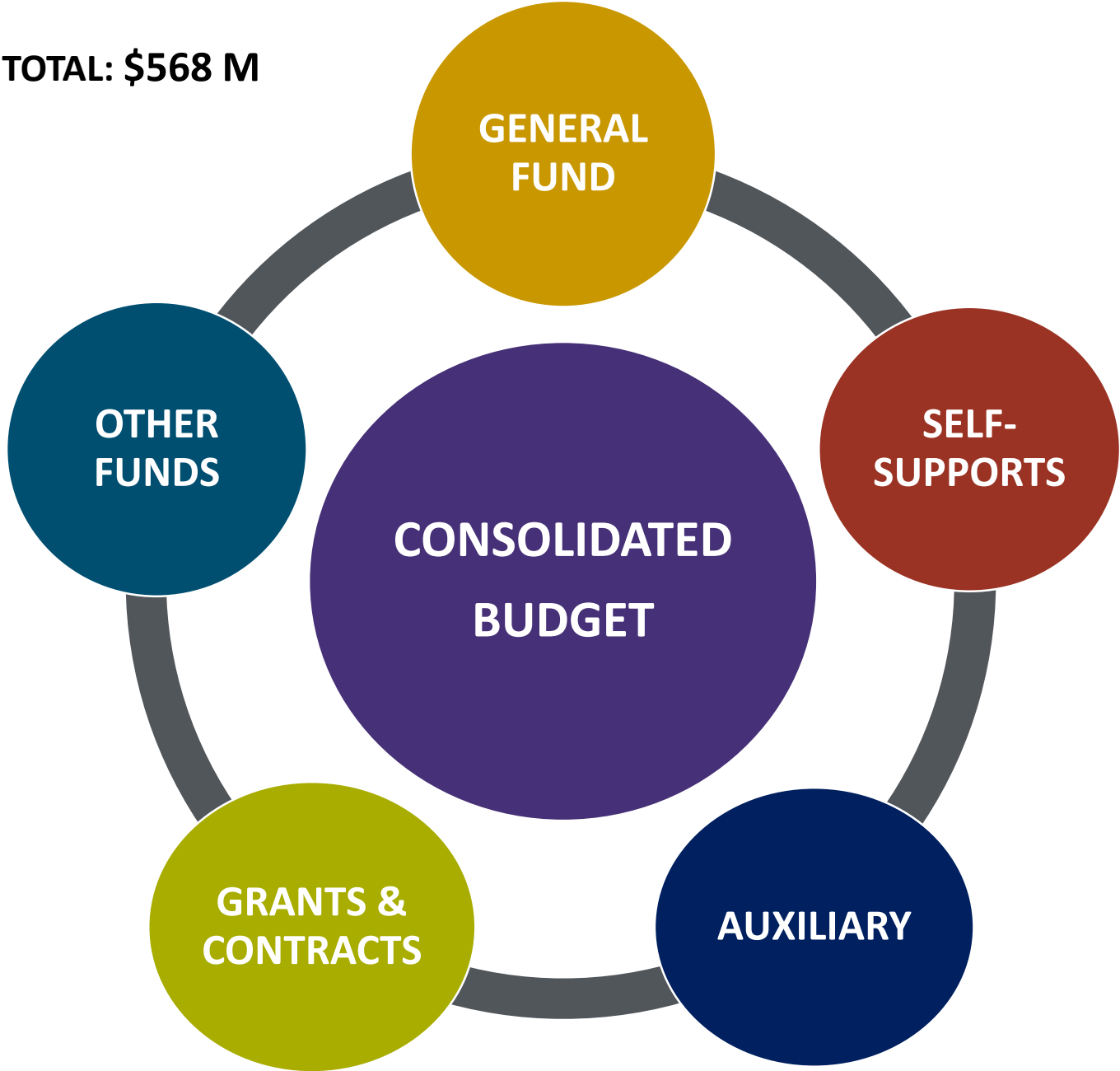
Engagement

- Formal feedback/response platform
- Optimal space utilization
- Reporting outcomes and savings from cost efficiency and reduction initiatives

2019-20 AND FORWARD

2018-19 SF STATE UNIVERSITY CONSOLIDATED OPERATING BUDGET

TOTAL: \$568 M

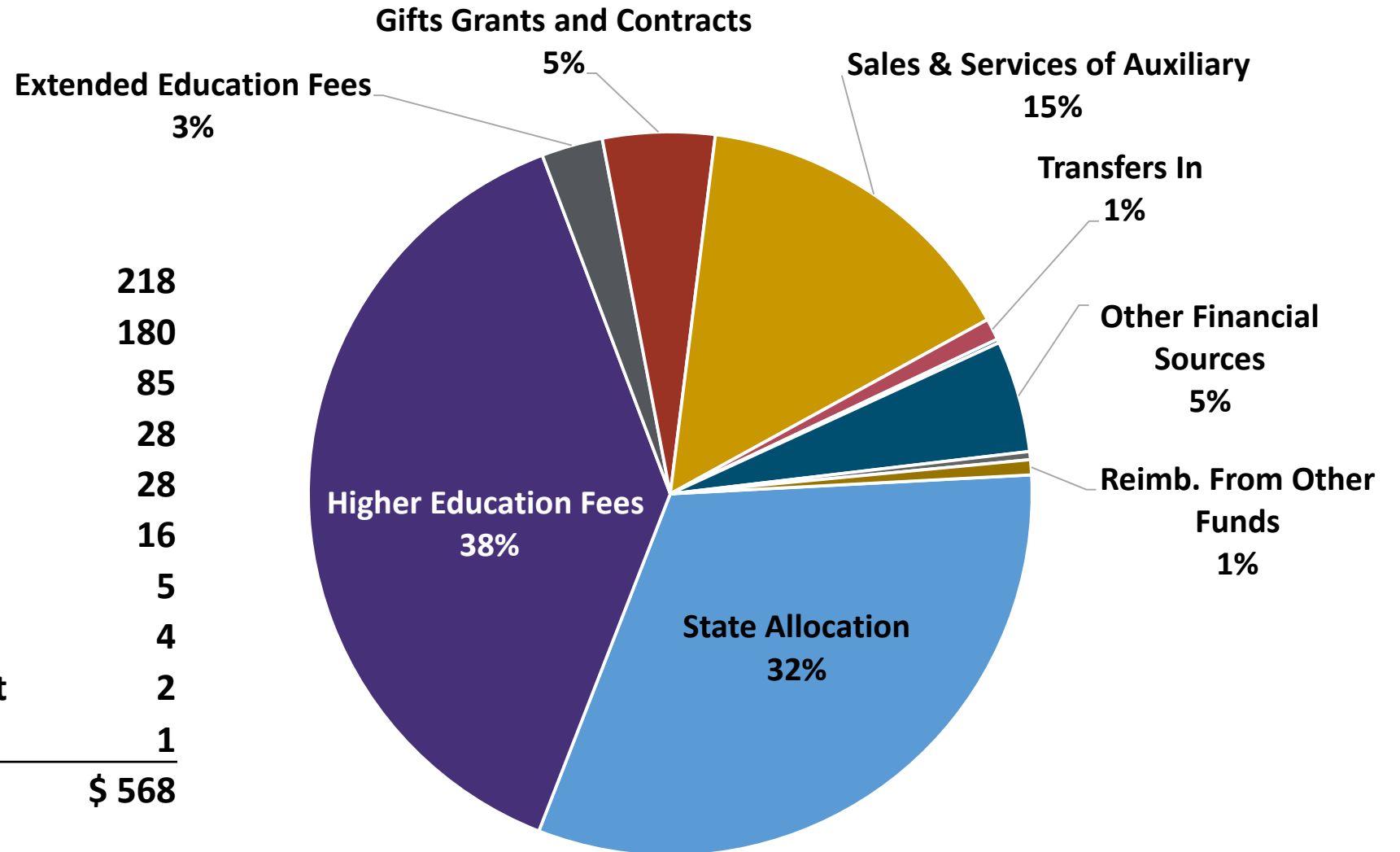


<u>FY2018-19</u>	<u>%</u>
GENERAL FUND	67%
SELF-SUPPORTS	19%
OTHER FUNDS	7%
GRANTS & CONTRACTS	5%
AUXILIARY	2%
	100%

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
	\$ 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

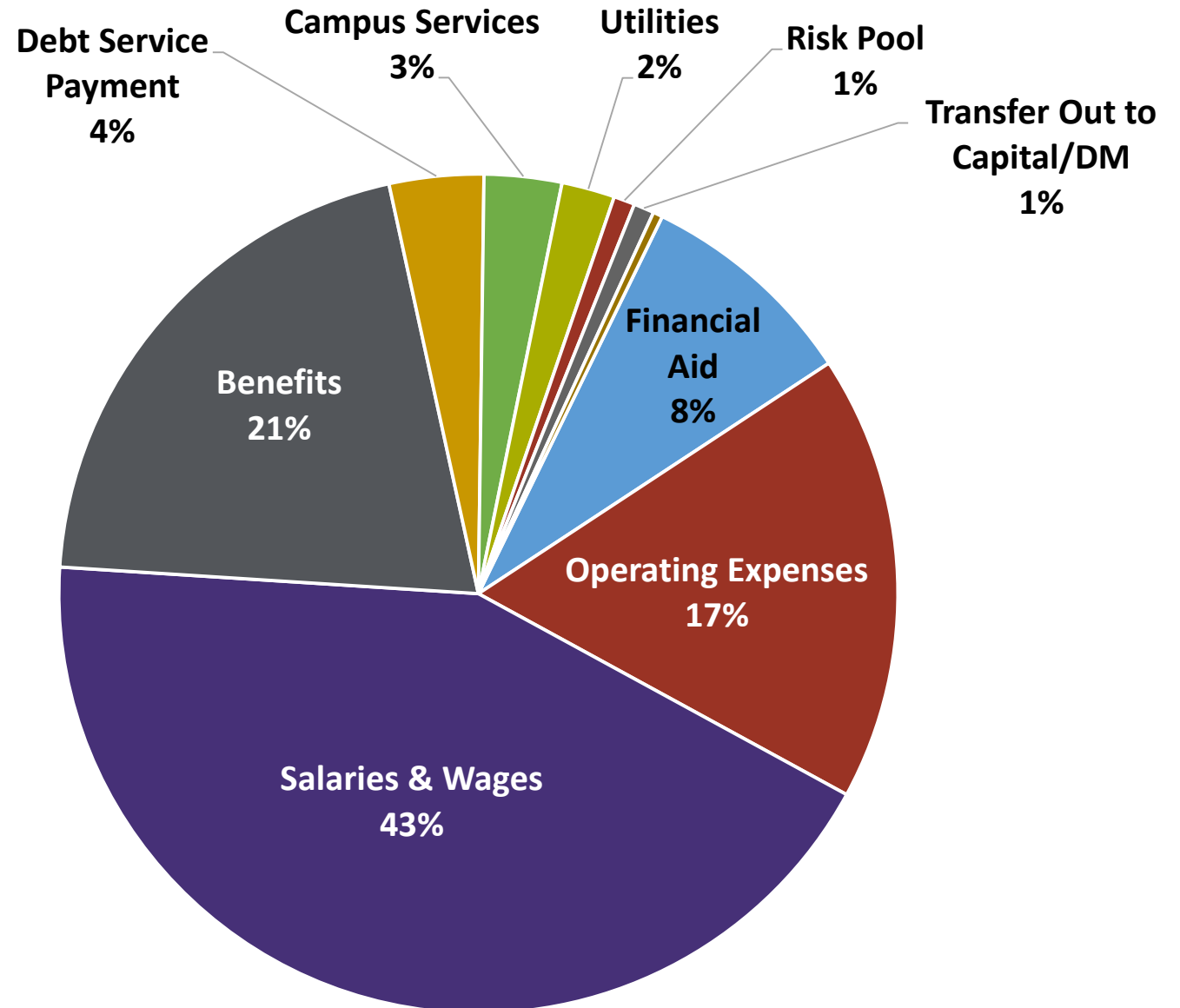
⁽³⁾ Other Financial Sources: Cost Recovery, Cost Allocation, IDC, misc. fee from various self support

⁽⁴⁾ Transfer in: Residential Life & Lottery Fund

2018-19 SF STATE UNIVERSITY CONSOLIDATED BUDGET-EXPENDITURES

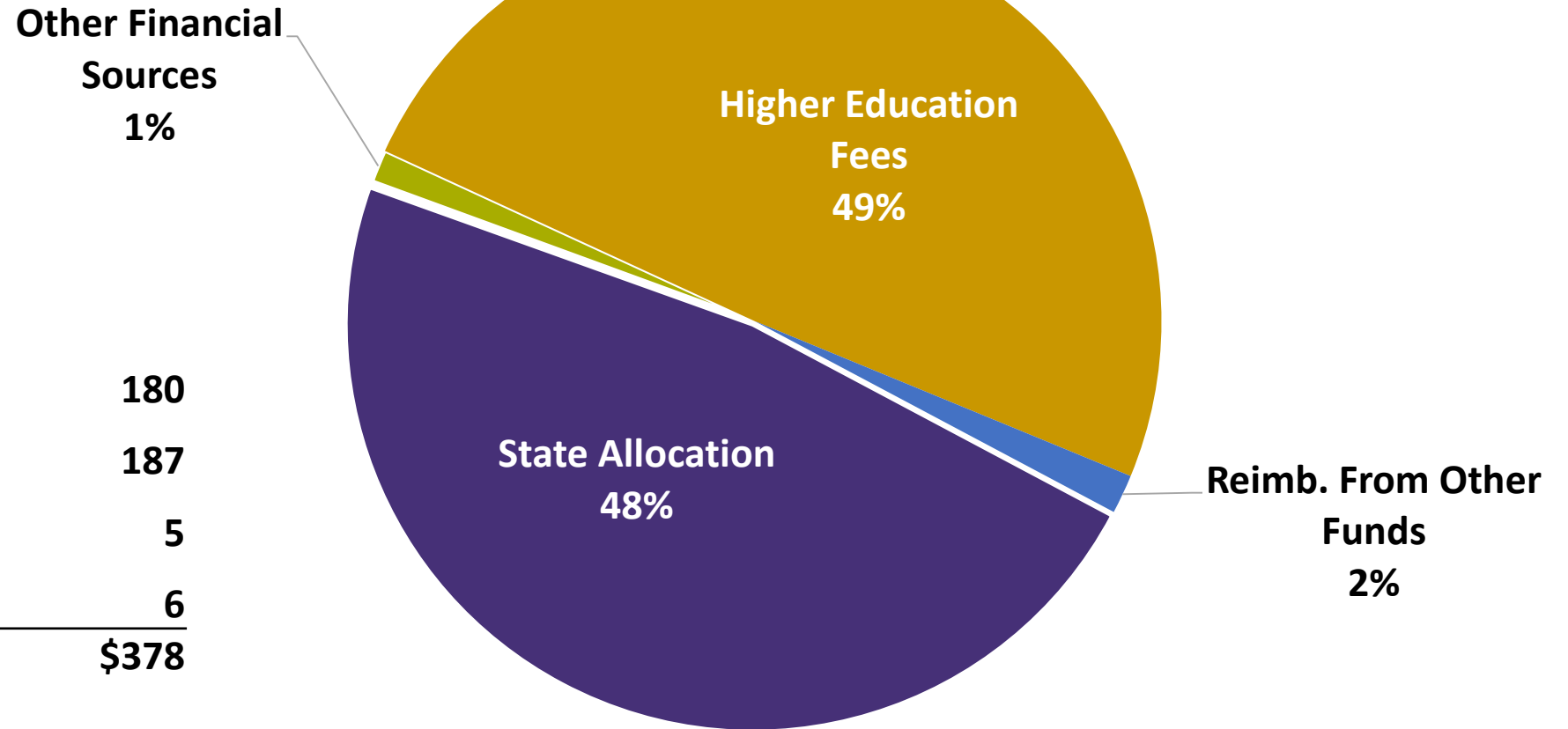
(In millions)

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
	<hr/>
	\$568



2018-19 SF STATE UNIVERSITY GENERAL FUND BUDGET-REVENUES

(In millions)



State Allocation	180
Higher Education Fees	187
Other Financial Sources ⁽¹⁾	5
Reimb. From Other Funds ⁽²⁾	6
	<hr/>
	\$378

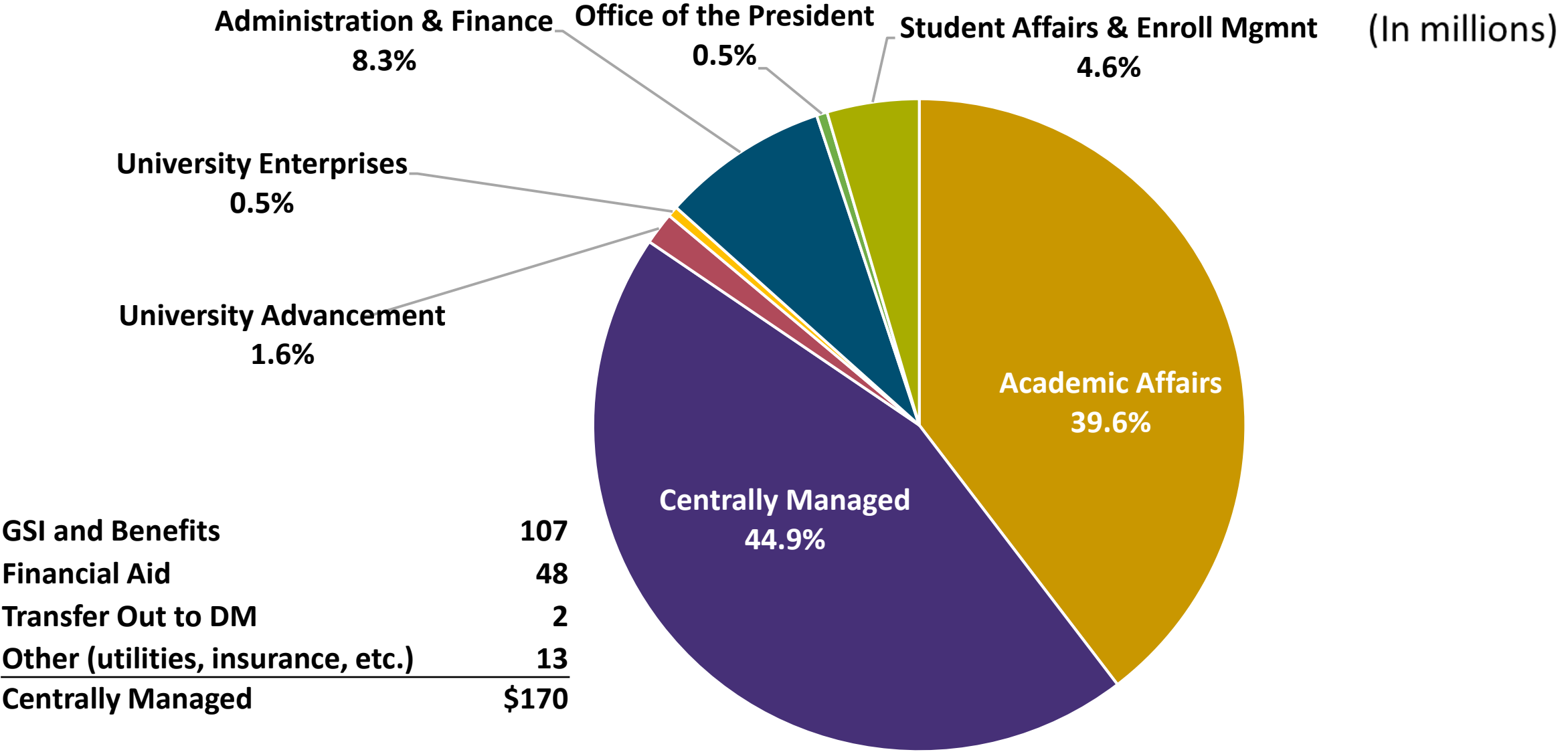
Notes:

⁽¹⁾ Cost recovery Open University, cost allocation.

⁽²⁾ Reimbursement release time, est. retirement adjustment.

TOTAL REVENUES: \$378 M

2018-19 SF STATE UNIVERSITY GENERAL FUND BUDGET BY CABINET



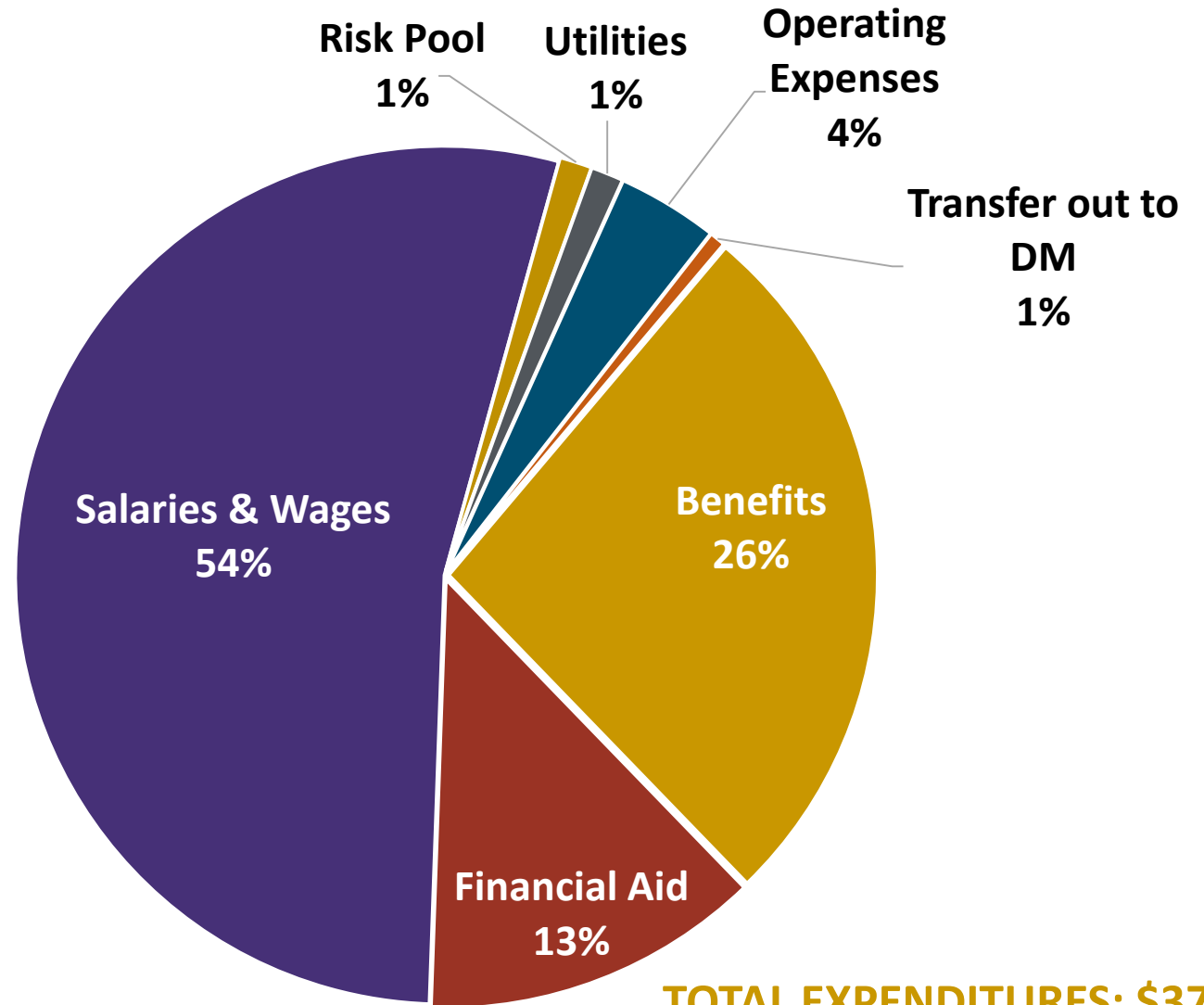
GSI and Benefits	107
Financial Aid	48
Transfer Out to DM	2
Other (utilities, insurance, etc.)	13
Centrally Managed	\$170

TOTAL ALLOCATIONS BY CABINET: \$378 M

2018-19 SF STATE UNIVERSITY GENERAL FUND BUDGET-EXPENDITURES

(In millions)

Salaries & Wages	203
Benefits	101
Operating Expenses	14
Risk Pool	5
Transfer out to DM ⁽¹⁾	2
Utilities	5
Financial Aid & Work-study	48
	\$378

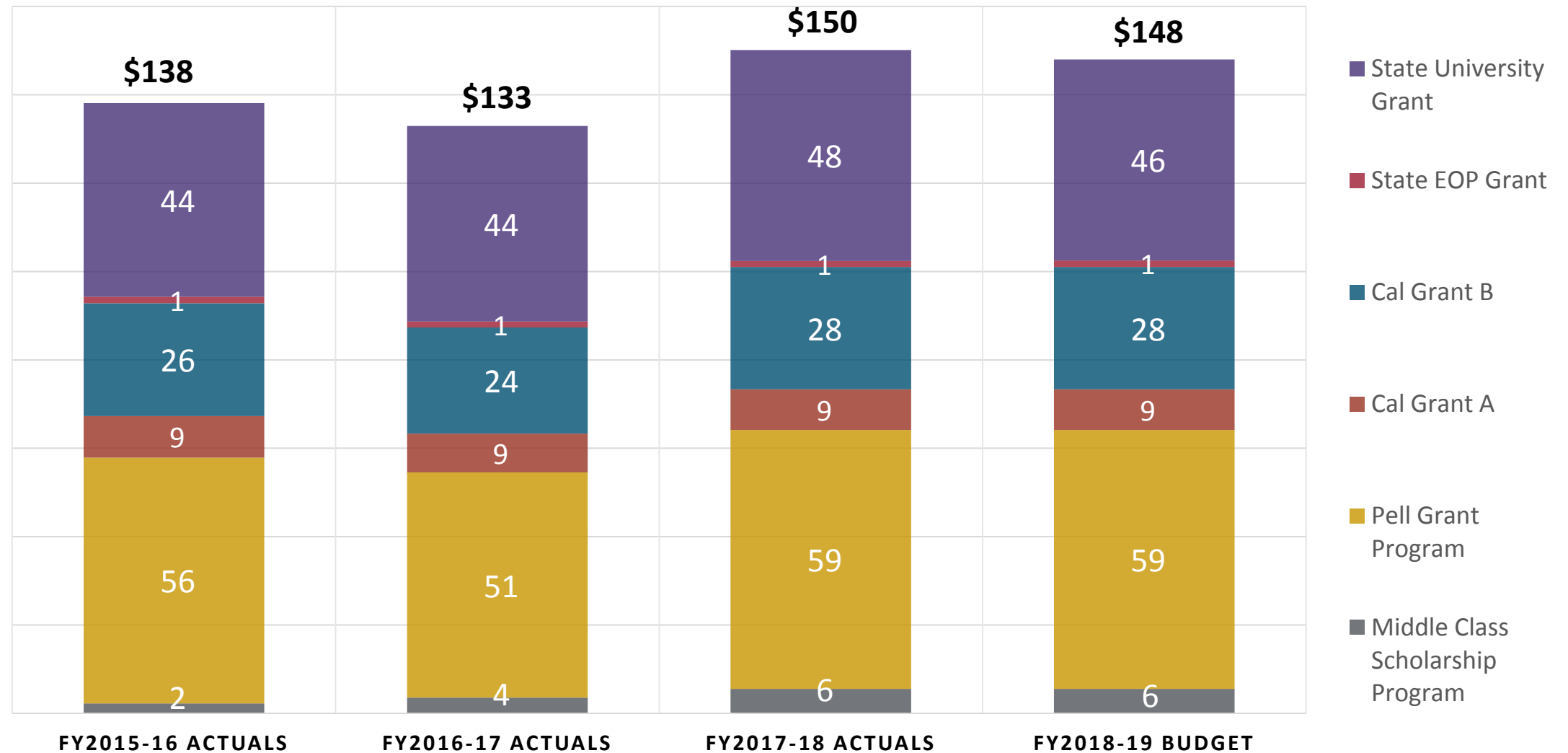


Notes: ⁽¹⁾ DM- Deferred maintenance CSU 486

TOTAL EXPENDITURES: \$378 M

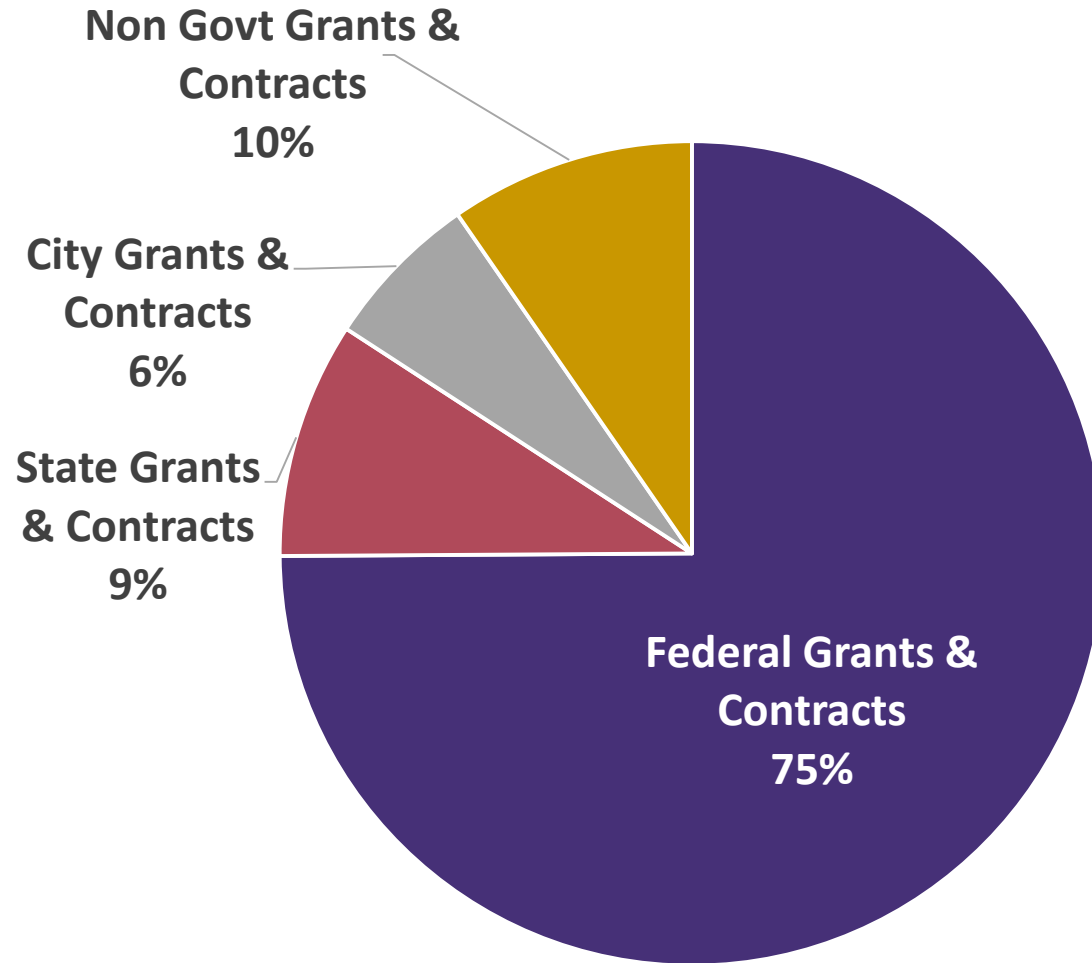
2018-19 SF STATE UNIVERSITY FINANCIAL AID

(In millions)

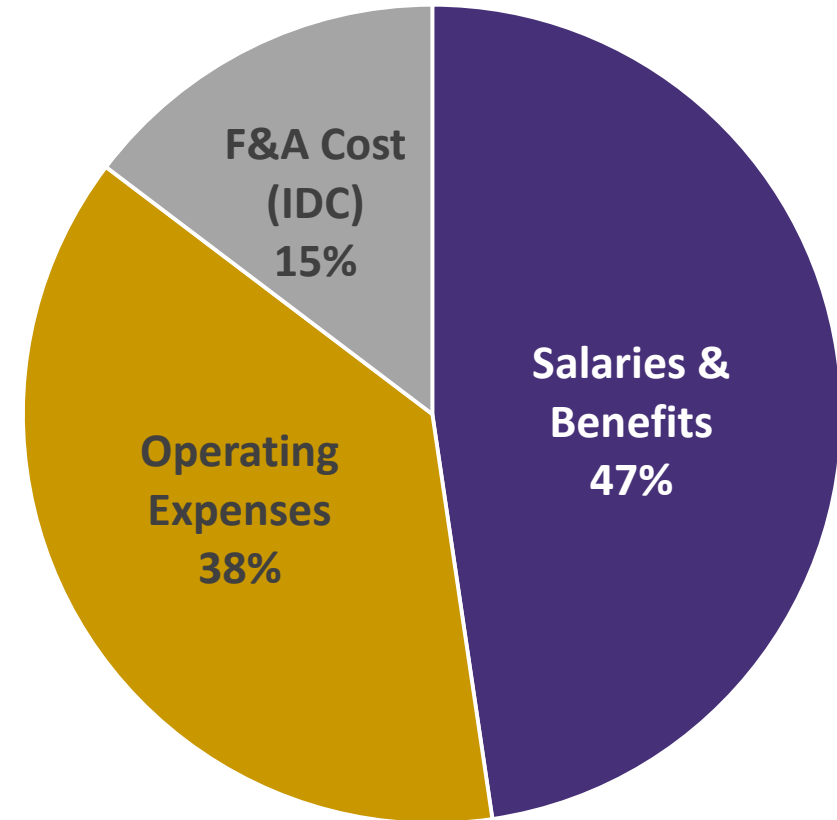


Notes: Educational Opportunity Program (EOP)

2018-19 SF STATE UNIVERSITY GRANTS & CONTRACTS



Total Revenue: \$28.4 M



Total Expense: \$28.4 M

2018-19 SF STATE UNIVERSITY AUXILIARIES

FY2018-19 Budget - Revenue

Associated Students = \$9.2M

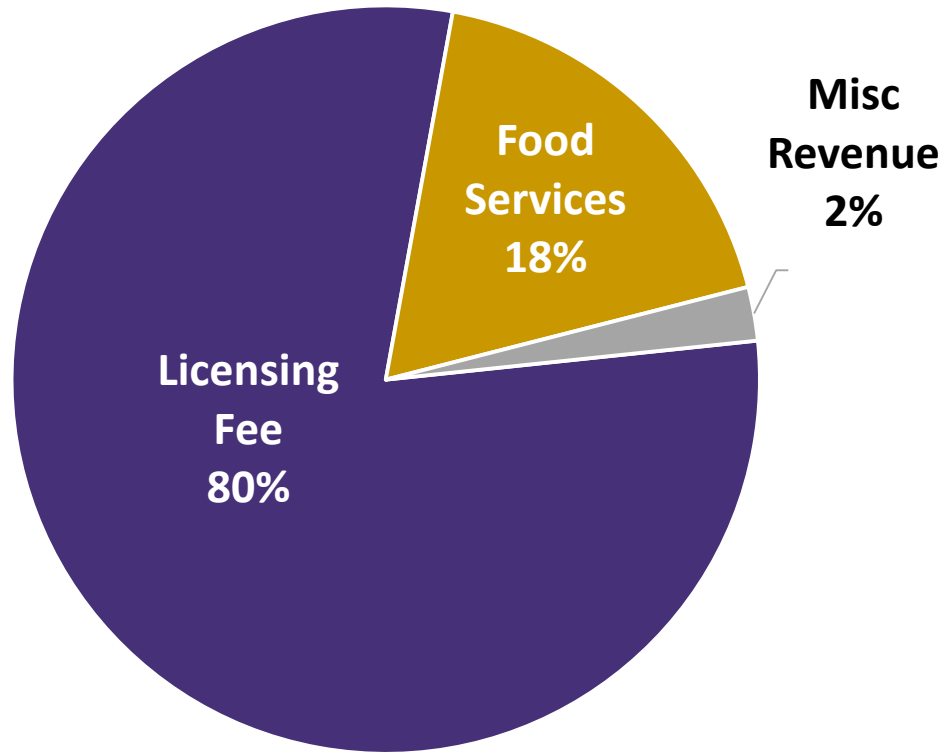
Foundation = \$1.8M

University Corporation = \$2.8M

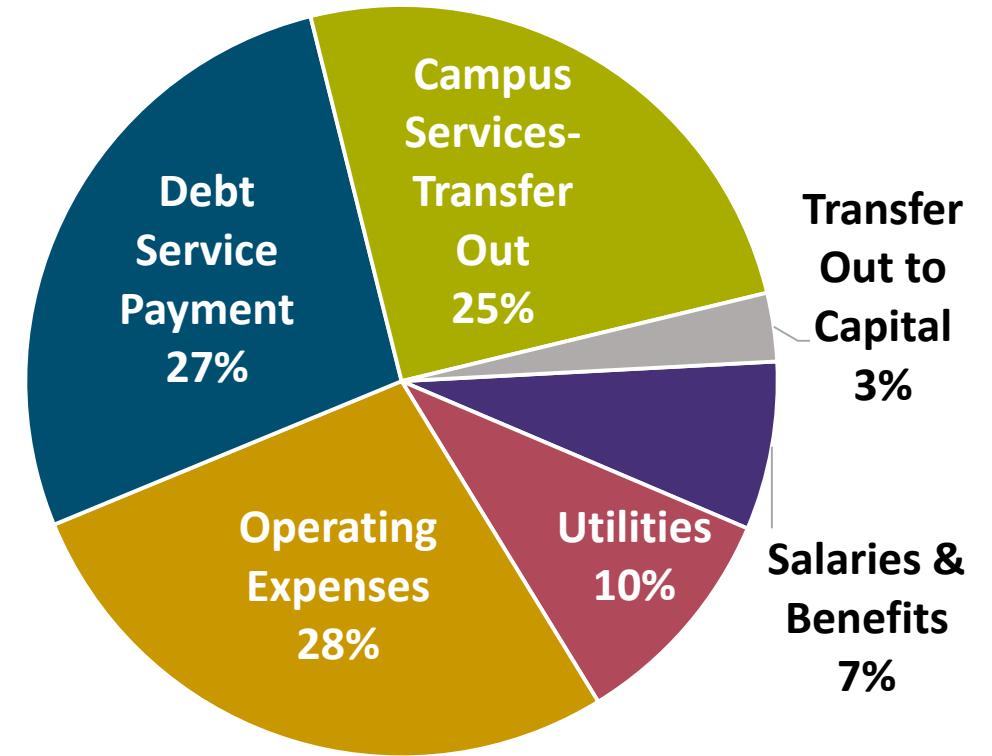
Total = \$13.8M

- Separate legal entities authorized to provide essential services to the CSU educational programs.
- Fiduciary responsibility to governing boards.

2018-19 SELF SUPPORTED OPERATIONS-HOUSING, DINING & CONFERENCE SERVICES



Total Revenue: \$59.5 M



Total Expense: \$59.5 M

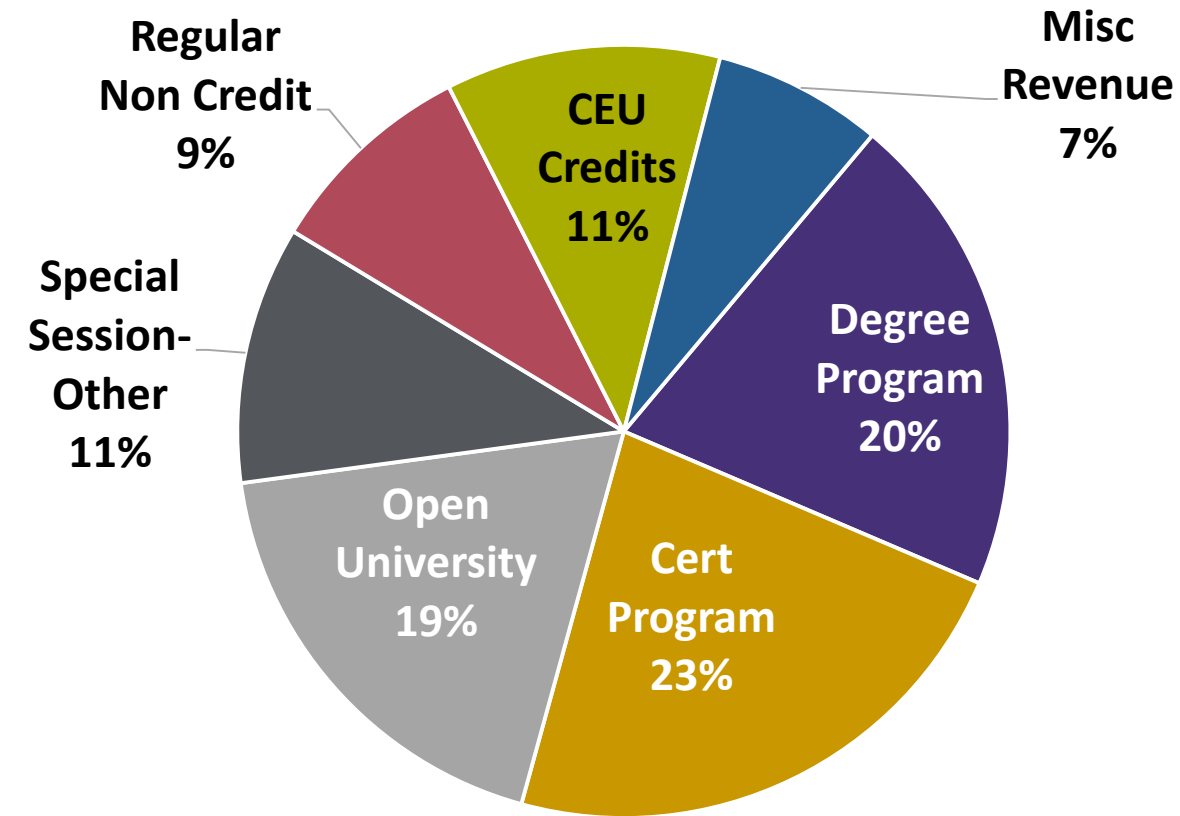
HIGHLIGHTS:

Housing Dining and Conferences Services (HDCS) manages FOUR programs: Student, Employee & Family Housing, and Non-Affiliates, Dining Services and Conference & Event Services, Residential Life

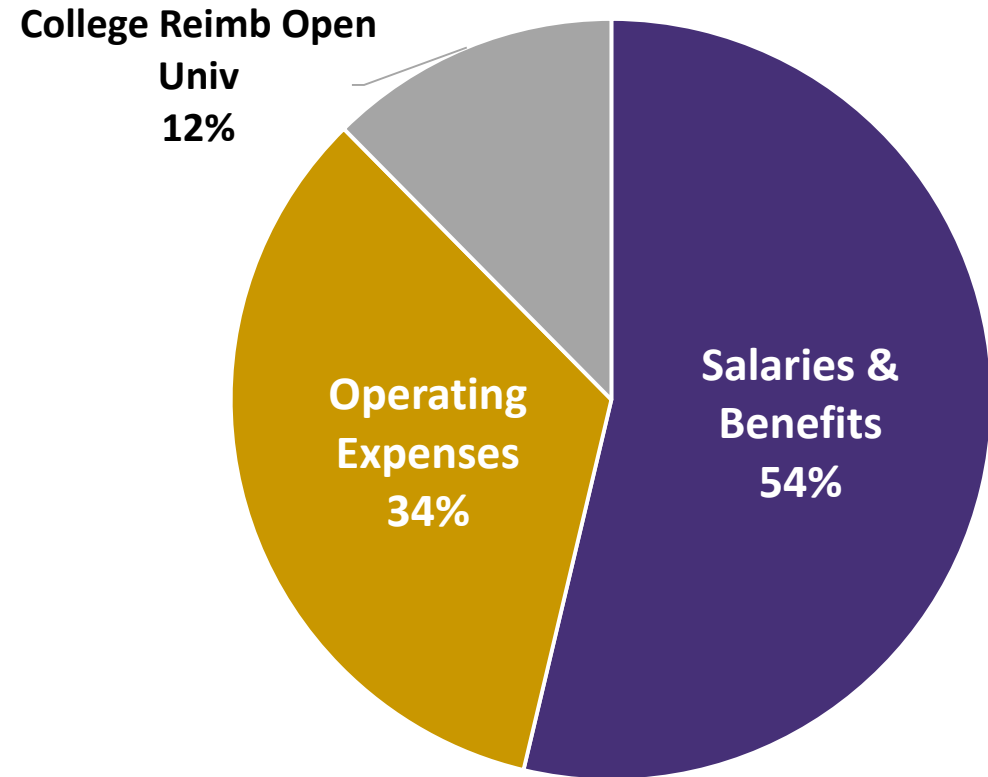
Notes: Campus Services expense includes services for Facilities, Res Life and IT.

Misc. Revenue- Conference & event services and interest.

2018-19 SELF SUPPORTED OPERATIONS-CONTINUING EDUCATION LEARNING



Total Revenue: \$16.8 M



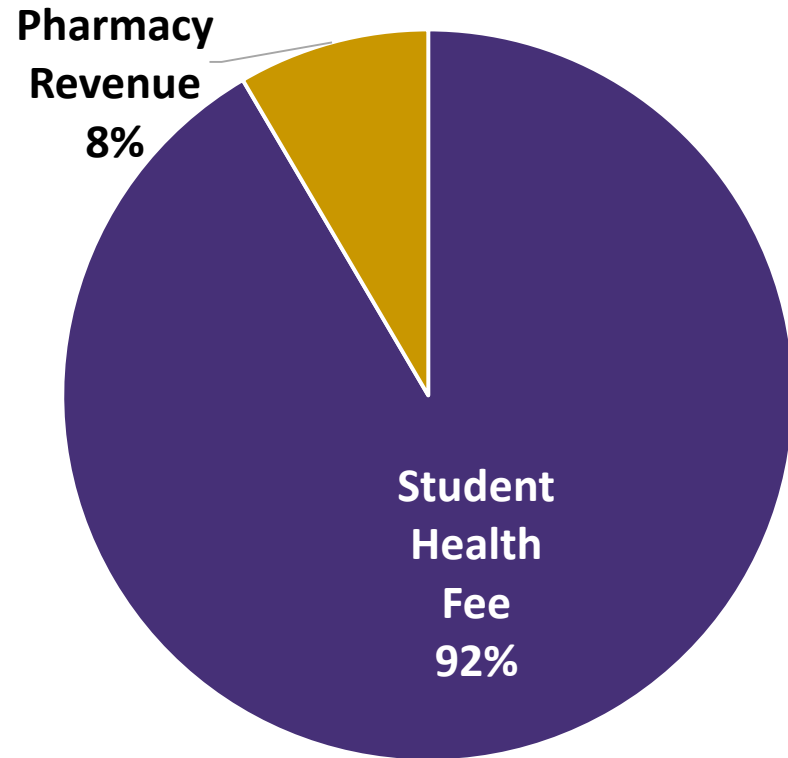
Total Expense: \$16.8 M

HIGHLIGHTS:

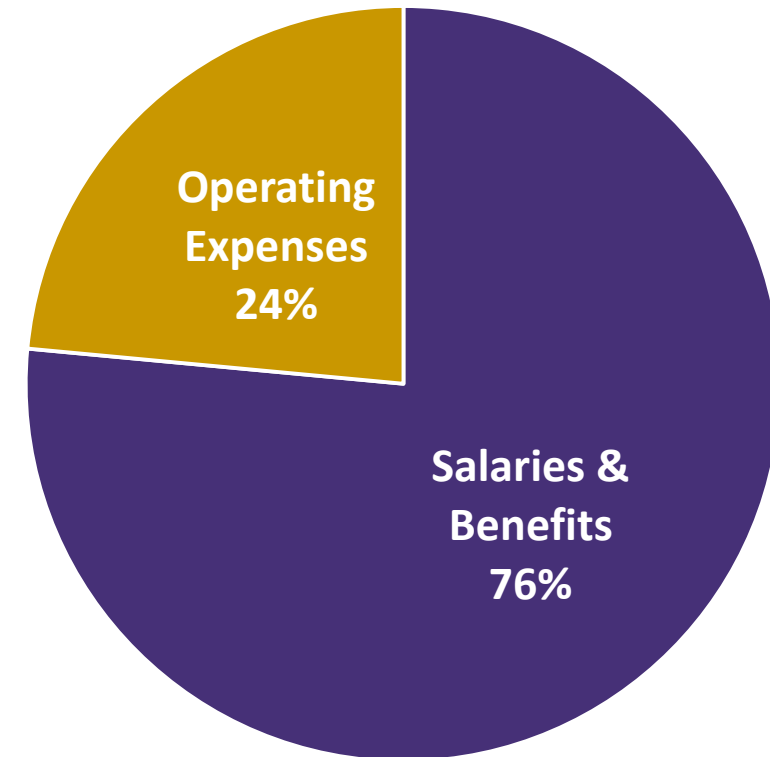
CEL offers academic credit certificates, professional development certificates, bootcamps, individual credit courses, non-credit courses and Continuing Education Units (CEU's). CEL also provides access to SF State courses through Open University, Winter Session and Elder College.

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.

2018-19 SELF SUPPORTED OPERATIONS-STUDENT HEALTH



Total Revenue: \$13.2 M



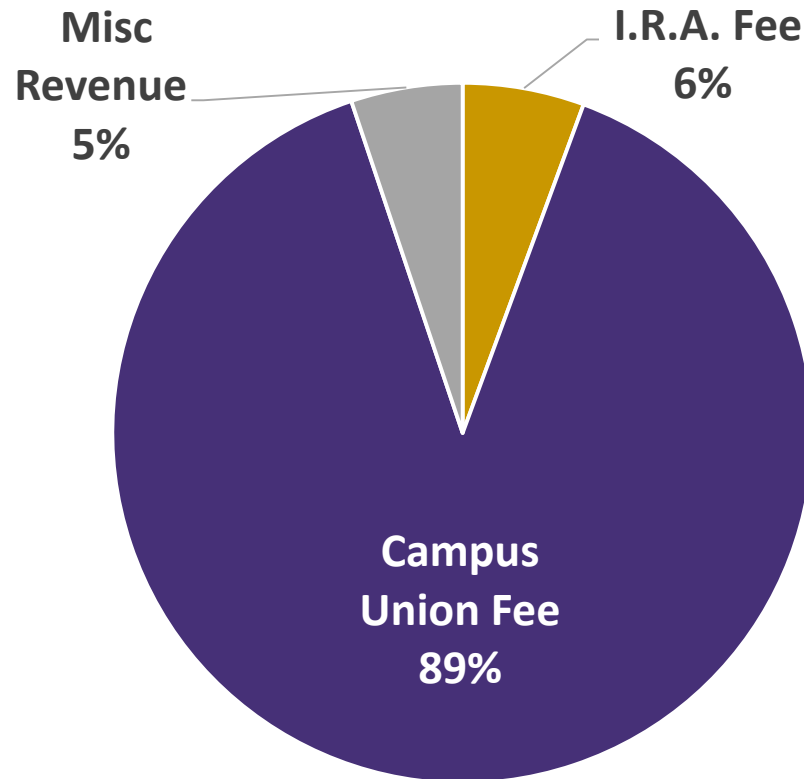
Total Expense: \$13.2 M

HIGHLIGHTS:

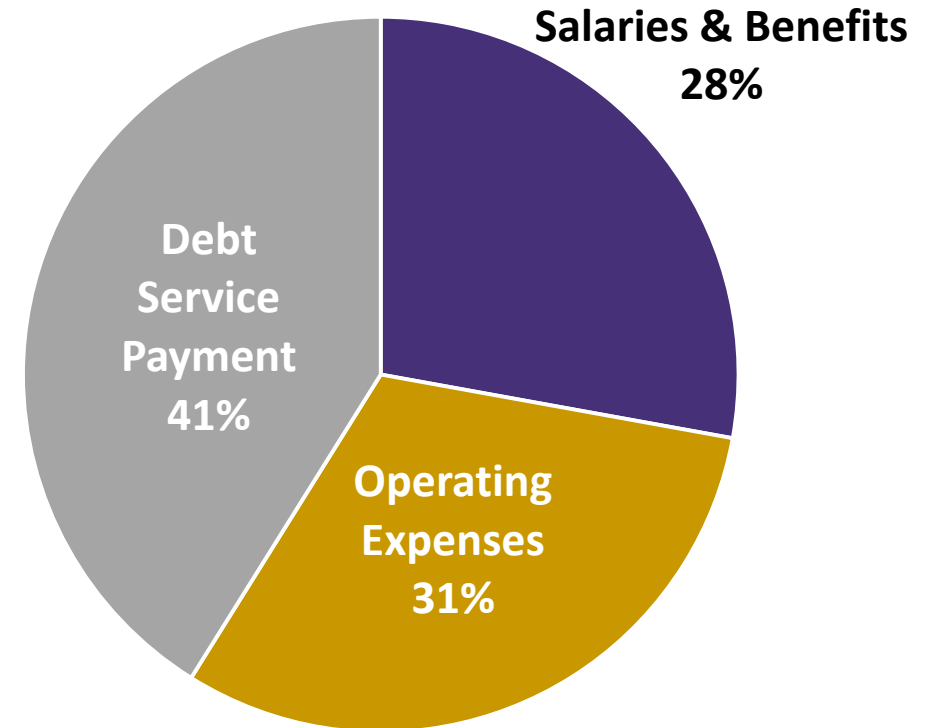
Student Health is comprised of Health Promotion & Wellness (HPW), Counseling & Psychological Services (CAPS), and Student Health Services (SHS). The services exist to provide comprehensive, best practice responses for our student's basic needs and well-being. These 3 units engage students to foster resilience 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.

2018-19 SELF SUPPORTED OPERATIONS-CAMPUS RECREATION



Total Revenue: \$10.1 M



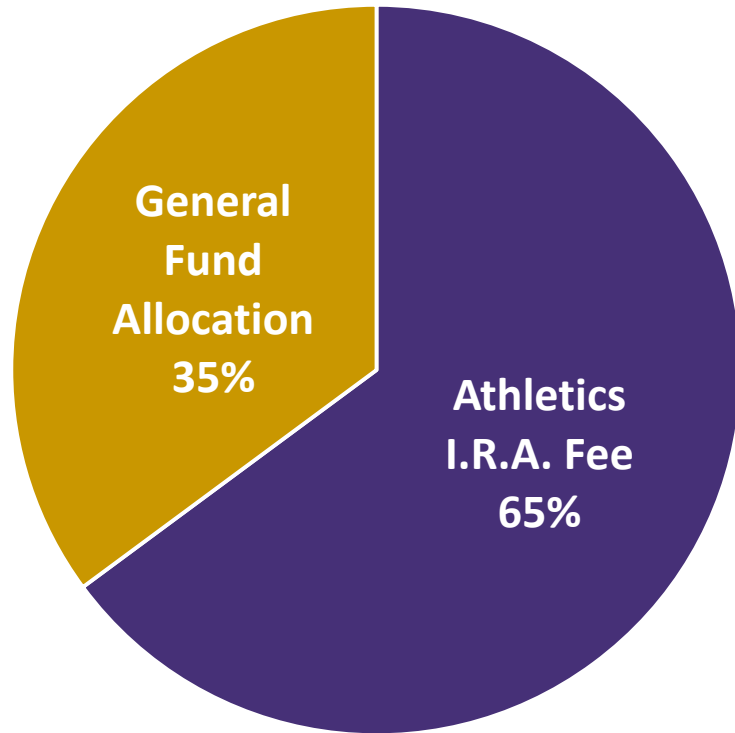
Total Expenses: \$10.1 M

HIGHLIGHTS:

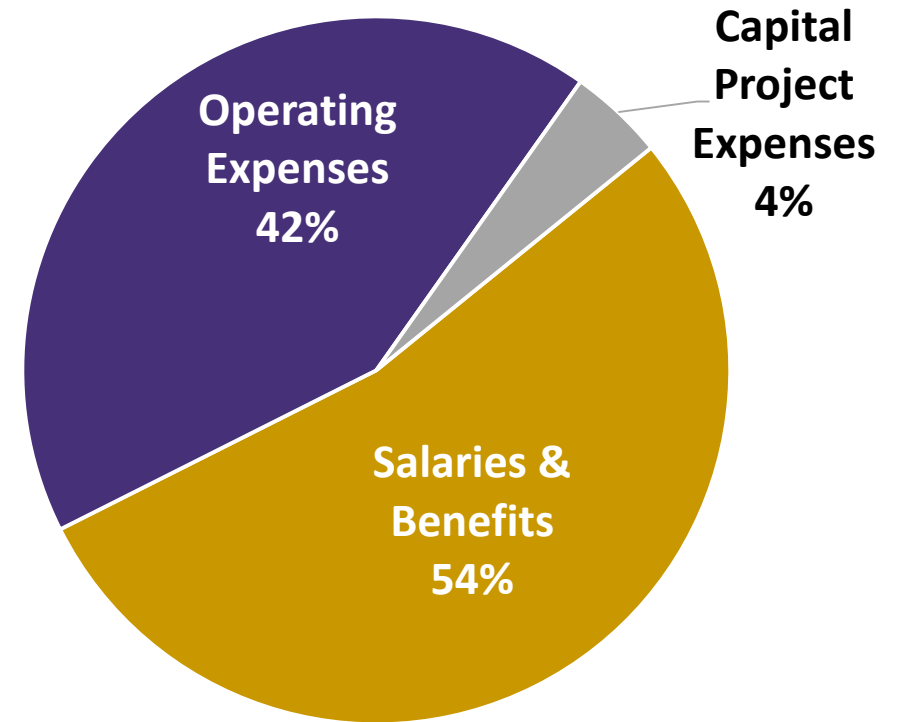
Campus Recreation Department offers a variety of fitness and wellness programs and services for the campus community and operates the Mashouf Wellness Center. Besides being open for 115 hours per week during the academic year and 85.5 hours per week during the summer and intersessions, Campus Recreation 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

2018-19 SELF SUPPORTED OPERATIONS-ATHLETICS



Total Revenue: \$5.6 M



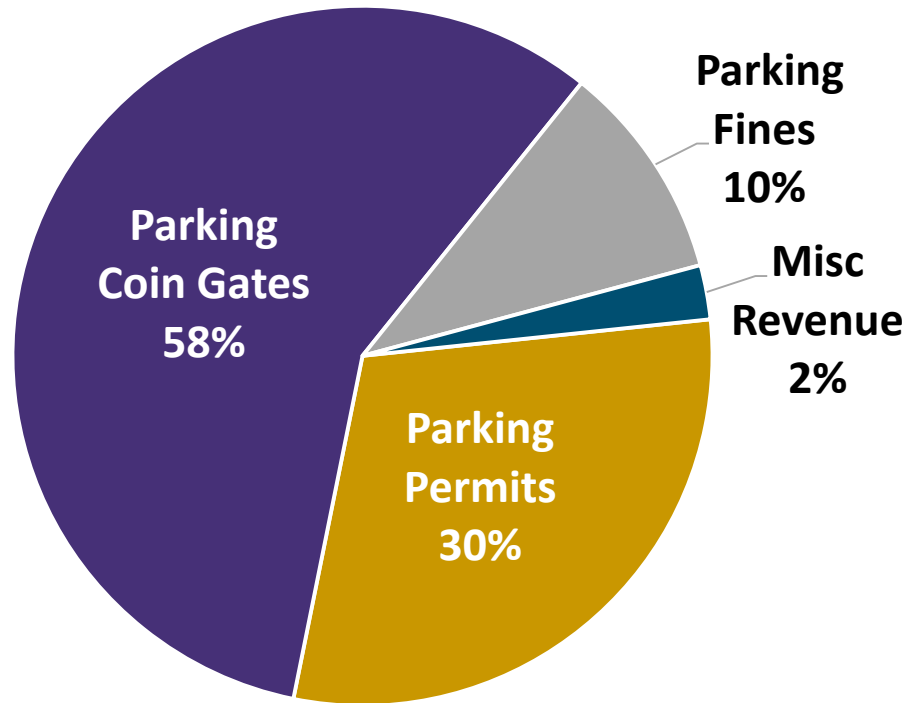
Total Expense: \$5.6 M

HIGHLIGHTS:

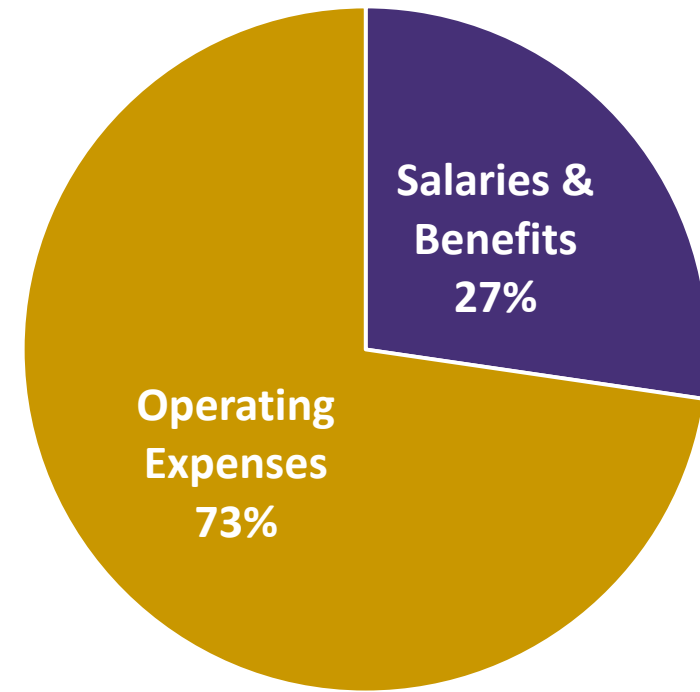
The mission of the Athletic Department at San Francisco State University is to provide a broad-based NCAA Division II intercollegiate athletics program that fosters the physical, intellectual, social and emotional development of a diverse and highly skilled group of student-athletes. Intercollegiate 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, and by doing so, enhance the cohesiveness of campus life. SF State offers 12 NCAA sports.

Notes: Also Includes Operating Fund (NG001) portion for Athletics

2018-19 SELF SUPPORTED OPERATIONS-PARKING AND TRANSPORTATION



Total Revenue: \$3.1 M



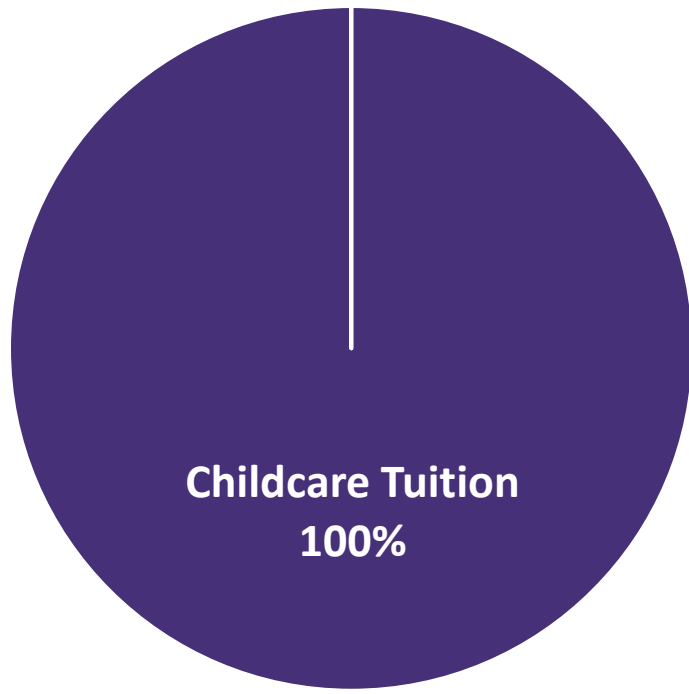
Total Expense: \$3.1 M

HIGHLIGHTS:

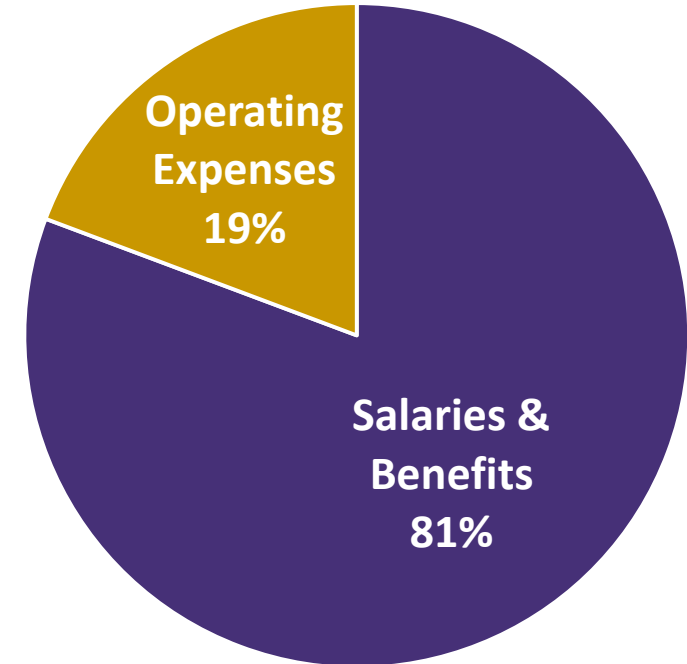
Parking & Transportation supports about 33,000 of combined staff, faculty, and students by providing reasonable parking rates and offering transit options for those who commute to campus through programs and services such as free Shuttle to/from Daly City Bart station and campus, commuter check, RideMatch, 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.

2018-19 SELF SUPPORTED OPERATIONS-CHILDREN'S CAMPUS



Total Revenue: \$1.7 M



Total Expense: \$1.7 M

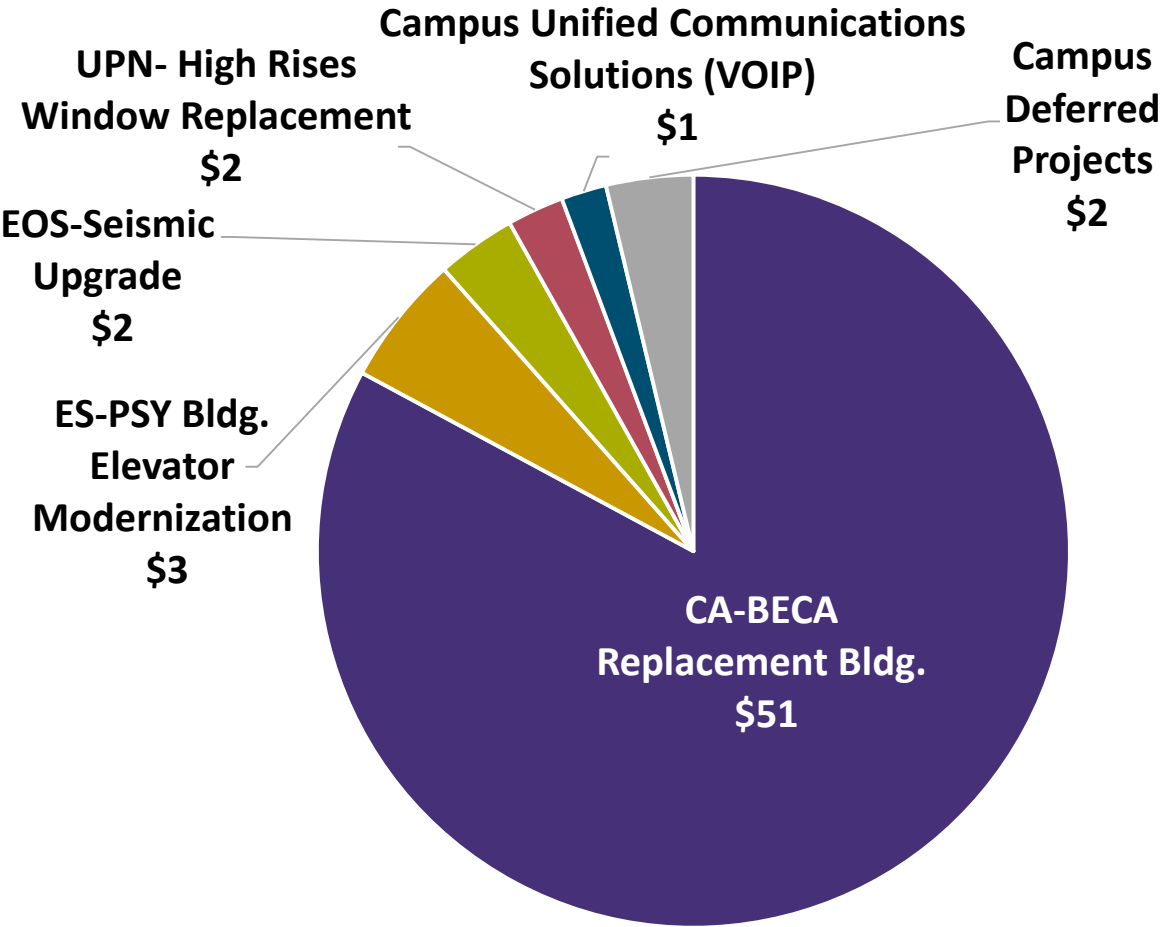
HIGHLIGHTS:

Children's Campus generates revenue from tuition the families pay to receive care for their child.

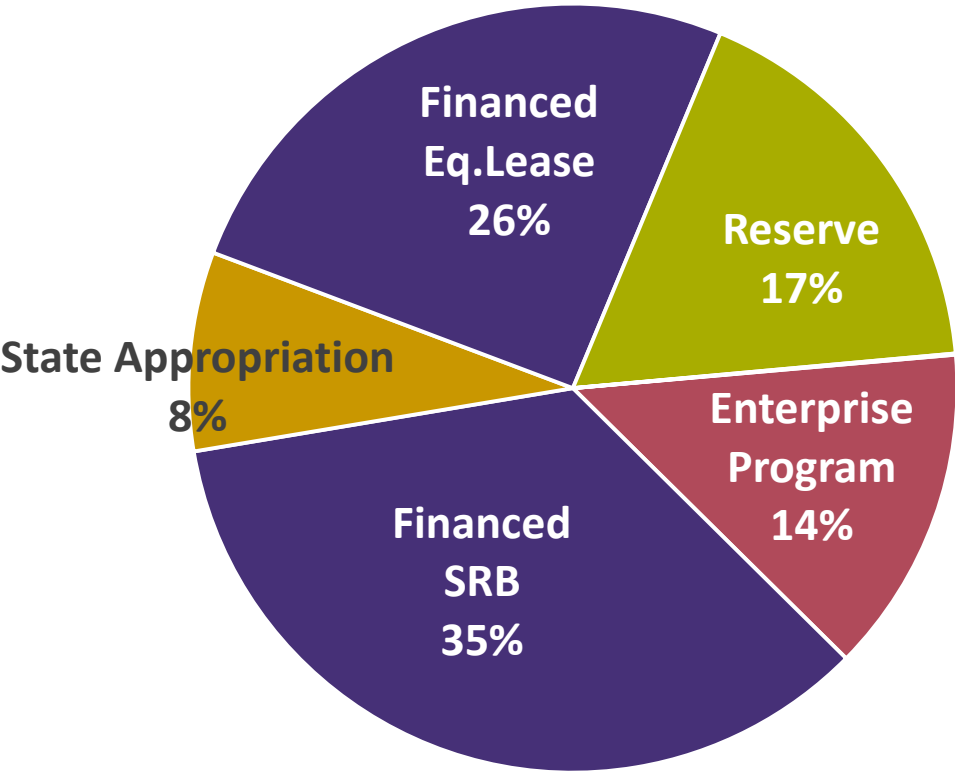
Over the past five years, an average of 443 SF State students spent an average of 6,119 hours at the center each year. For every full-time equivalent child enrolled at Children's Campus, the center touches 6.5 SF State students and contributes 90 hours towards their educational success. In addition to 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

(In millions)



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



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

Q&A



Administration and Finance

San Francisco State University
1600 Holloway Avenue, ADM 354
San Francisco, CA 94132



Phone

(415) 338-2521 Main



Email / Website

pcarter@sfsu.edu

www.sfsu.edu

Thank You



Administration and Finance

San Francisco State University
1600 Holloway Avenue, ADM 354
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



San Francisco State University

Institutional Analytics

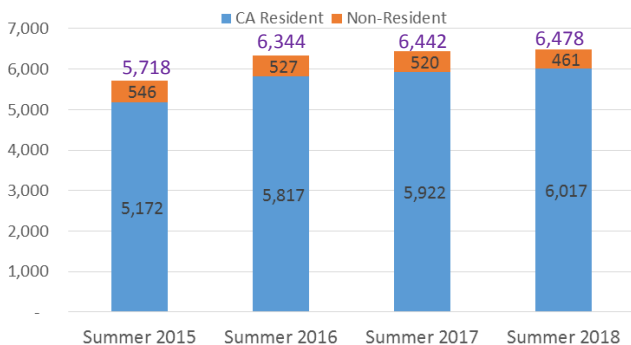
Enrollment Update

Fall 2018 and College Year 2018-19 Projection

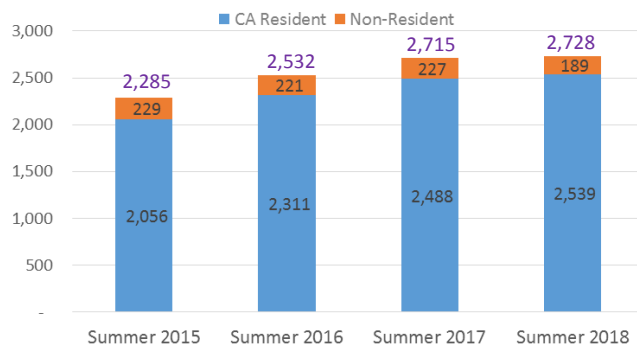
By Sutee Sujitparapitaya
October 9, 2018

Summer Enrollment Trends

Summer (Headcount) Enrollment Trend



Summer (FTES) Enrollment Trend



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

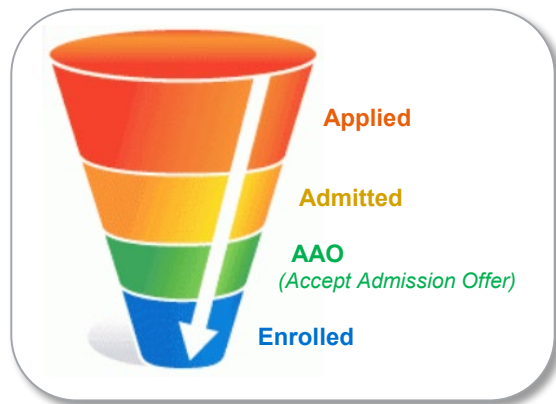
San Diego	7,509
San Francisco	6,442
Bakersfield	1,988
Fullerton	1,013
Maritime Academy	658
Long Beach	434
Northridge	408
Fresno	313
East Bay	310
San Jose	260
Los Angeles	259
Dominguez Hills	224
Sacramento	122

Summer 2018 Enrollment

	Headcount		
	CA Resident	Non-Resident	Total
Undergrad Students	5,485	415	5,900
2nd/Post Bacs	38	1	39
Graduate Students	494	45	539
Total	6,017	461	6,478

FTES		
CA Resident	Non-Resident	Total
2,309	176	2,485
12	0	12
217	14	231
2,539	189	2,728

Fall Enrollment - *New Students Only*



First-time Freshmen

	Fall 2017 *	Fall 2018 **	Difference
Applied	34,521	35,605	1,084
Admitted	24,327	25,553	1,226
% Admitted/Applied	70%	72%	
AAO	5,146	5,306	160
% AAO/Admitted	21%	21%	
Enrolled	4,323	4,288	(35)
% Enrolled/AAO	84%	81%	

New Undergraduate Transfers

	Fall 2017 *	Fall 2018 **	Difference
Applied	23,201	15,901	(7,300)
Admitted	16,889	12,455	(4,434)
% Admitted/Applied	73%	78%	
AAO	4,587	4,412	(175)
% AAO/Admitted	27%	35%	
Enrolled	3,710	3,385	(325)
% Enrolled/AAO	81%	77%	

New Graduates

	Fall 2017 *	Fall 2018 **	Difference
Applied	3,719	3,419	(300)
Admitted	1,424	1,393	(31)
% Admitted/Applied	38%	41%	
AAO	1,140	1,116	(24)
% AAO/Admitted	80%	80%	
Enrolled	976	953	(23)
% Enrolled/AAO	86%	85%	

Notes: * Fall 2017 Official Census; ** Fall 2018 Preliminary Census

Fall Enrollment – *All Students* (as of 10/01/2018)



Headcount

	Fall 2017	Fall 2018	Difference
New Students			
1st Time Freshmen	4,323	4,288	(35)
New UG Transfers	3,710	3,385	(325)
New PBac	148	174	26
1st Time Graduates	976	953	(23)
Total	9,157	8,800	(357)
Continuing Students			
Undergraduates	18,529	18,754	225
2BA/PBac	176	189	13
Graduates	1,746	1,831	85
Total	20,451	20,774	323
Total			
Undergraduates	26,562	26,427	(135)
2BA/PBac	324	363	39
Graduates	2,722	2,784	62
Total	29,608	29,574	(34)

Full-time Equivalent Students (FTES)

	Fall 2017	Fall 2018	Difference
New Students			
1st Time Freshmen	3,830	3,884	54
New UG Transfers	3,125	2,809	(315)
New PBac	137	170	33
1st Time Graduates	839	815	(23)
Total	7,930	7,678	(252)
Continuing Students			
Undergraduates	15,612	16,019	408
2BA/PBac	100	118	17
Graduates	1,246	1,256	11
Total	16,958	17,393	436
Total			
Undergraduates	22,566	22,712	146
2BA/PBac	237	288	51
Graduates	2,085	2,072	(13)
Total	24,888	25,071	184

Average Unit Load (AUL)

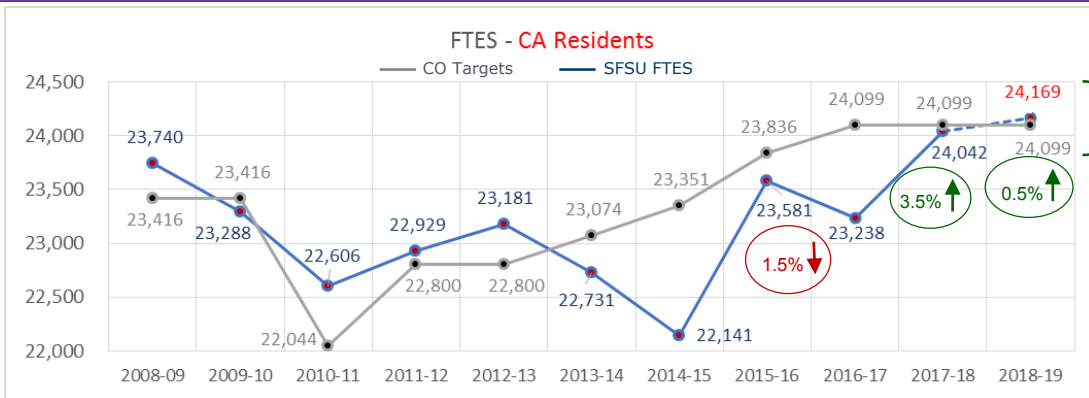
	Fall 2017	Fall 2018	Difference
Undergraduates	12.74	12.89	0.15
2BA/PBac	10.97	11.89	0.92
Graduates	9.19	8.93	(0.26)
Total	12.40	12.51	0.11

CY 2018-19 Projection – *FTES* (as of 10/01/2018)

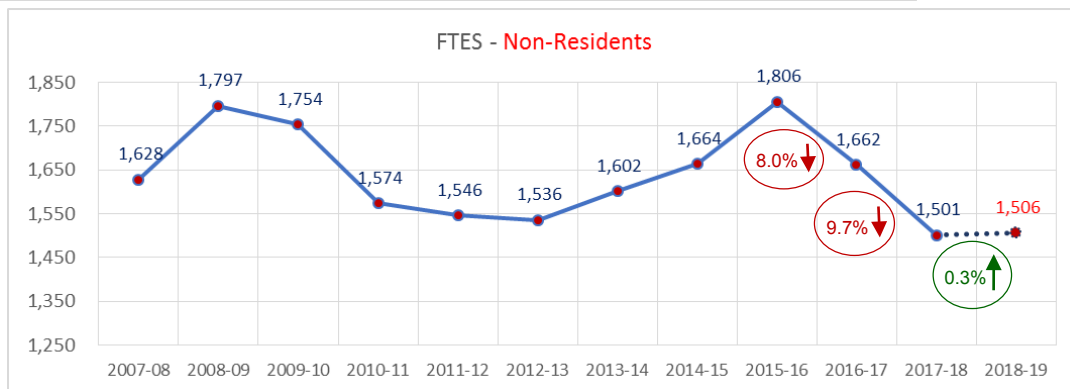
CY 2018-19 = College Year 2018-2019 (Summer 2018 + Fall 2018 + Spring 2019)



5



0.3% above
CO Target
(24,099 FTES)



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



Institutional Analytics

San Francisco State University
Administration Building, Room 450A
1600 Holloway Avenue, San Francisco, CA 94132



Phone: (415) 338-3501



Email: sutee@sfsu.edu

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

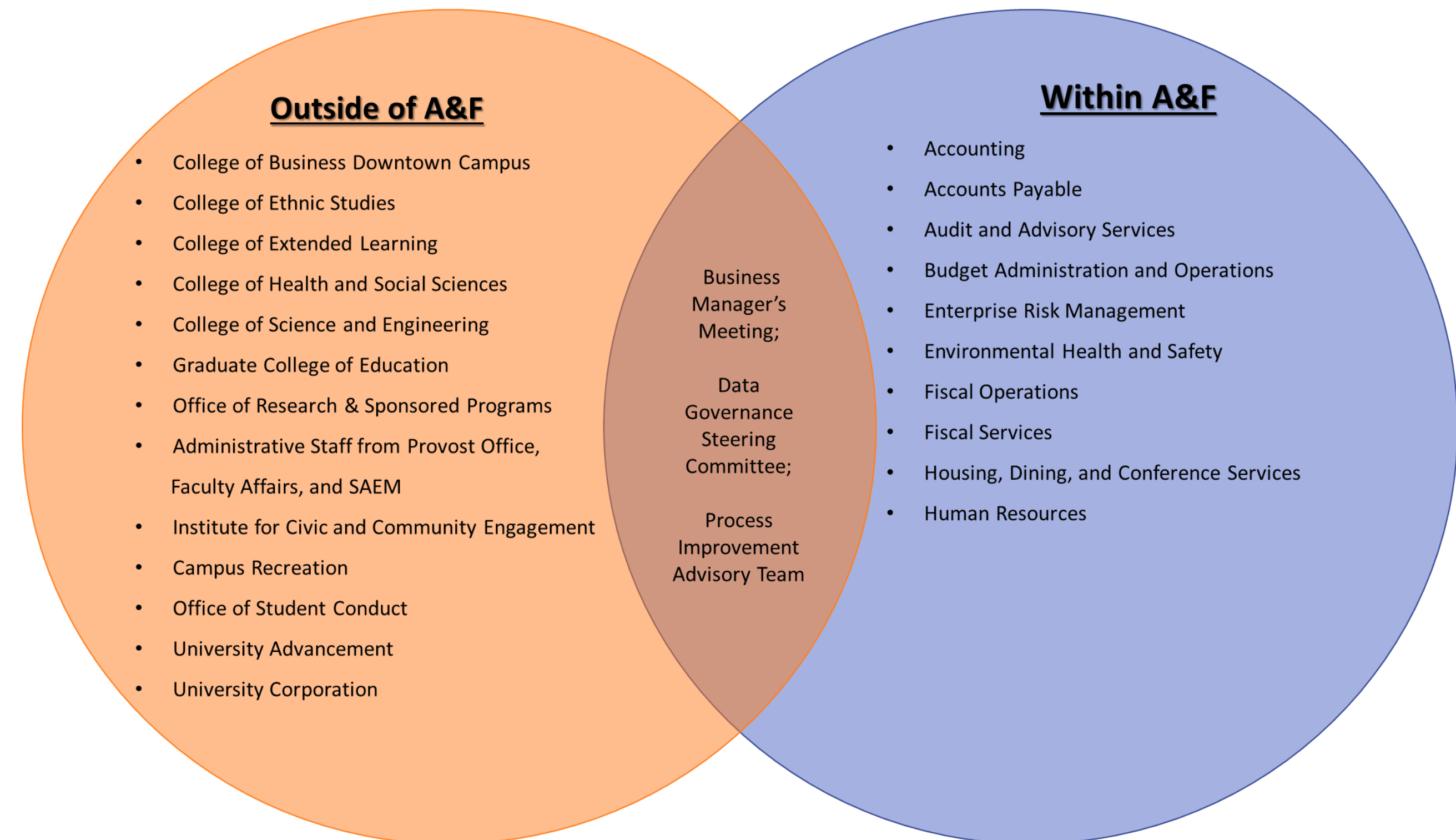
Campus Engagement

How do SFSU employees feel about campus processes

Manual and Paper-based Processes

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.

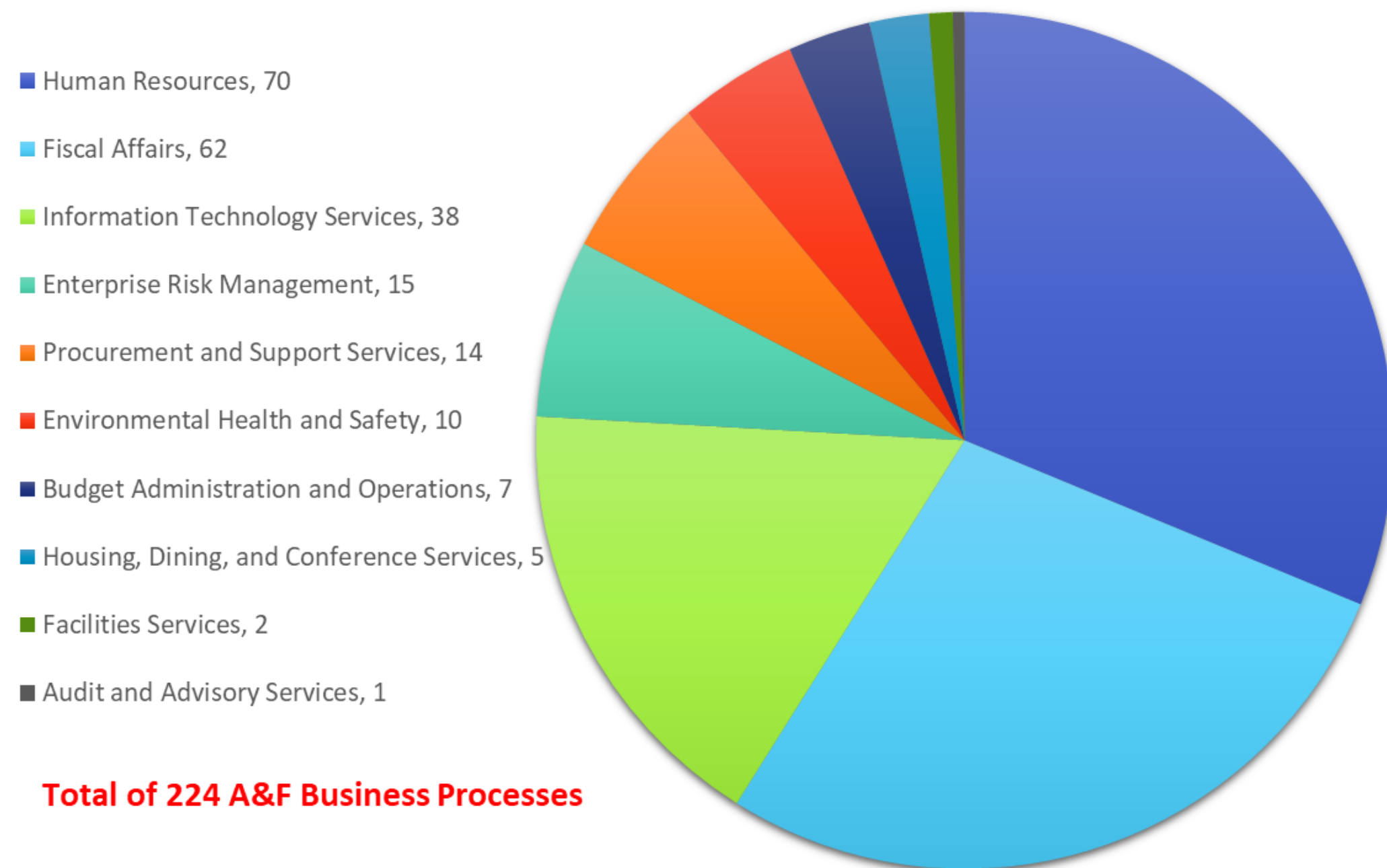


Audience of DocuSign Presentations

A&F Business Processes

Digitization and Process Improvement

A&F Business Process Distribution by Department



Data Source: A&F Department websites.

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.

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.

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.

Question:

How supportive are you of Administration & Finance adopting DocuSign for its forms and processes?

96 %

of employees
support this
initiative.

2015 SFSU Strategic Plan

Sustainability Initiative



Resilience

UNITED IN OUR PASSION FOR
ACADEMIC EXCELLENCE, IN
DISCOVERY, CREATIVE AND
INQUIRY AND EDUCATION

TOGETHER
WE MAKE
THE FUTURE
HAPPEN

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?

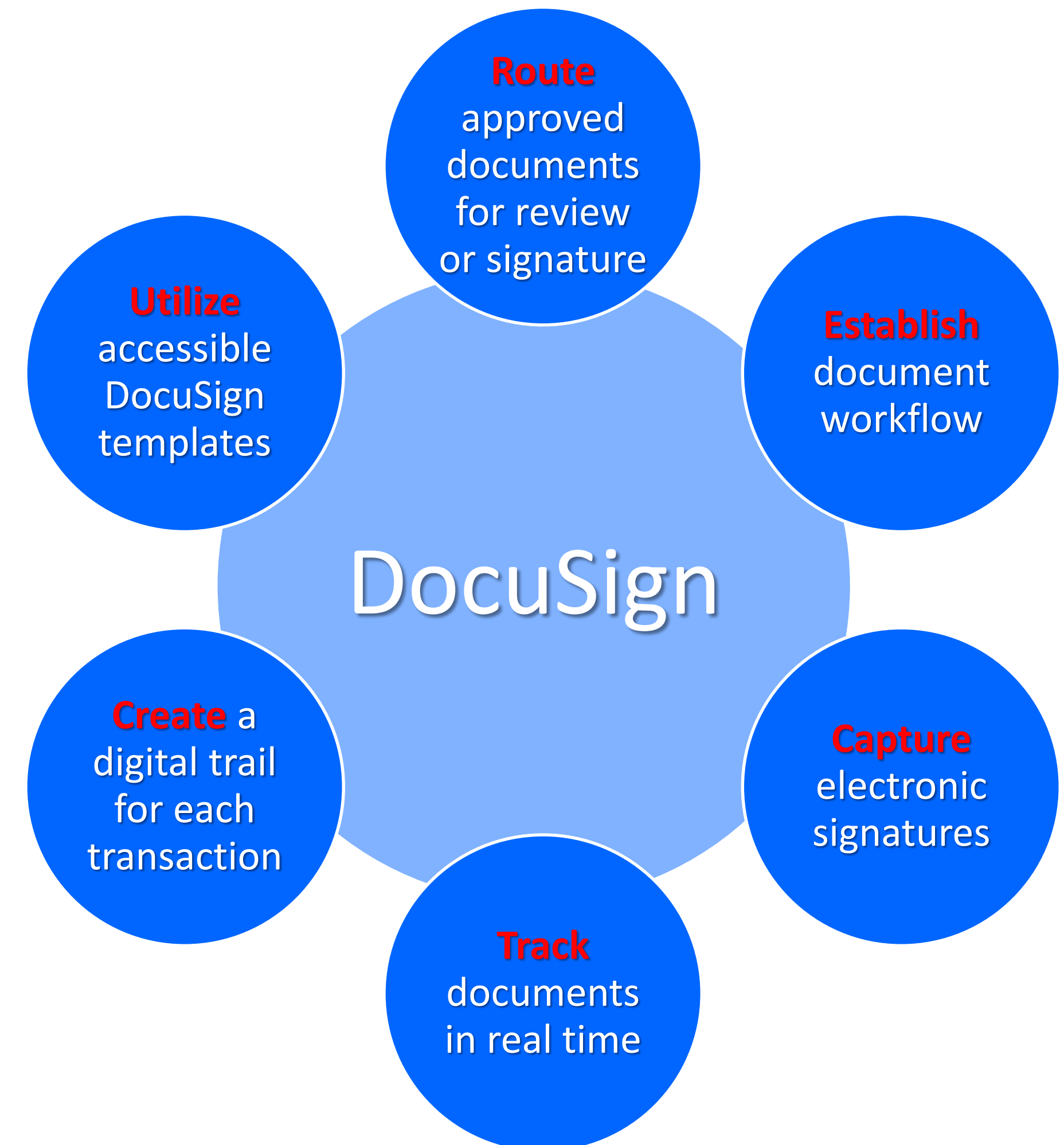
All *faculty and staff* will be able to use DocuSign for University business.

➤ 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

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

- 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

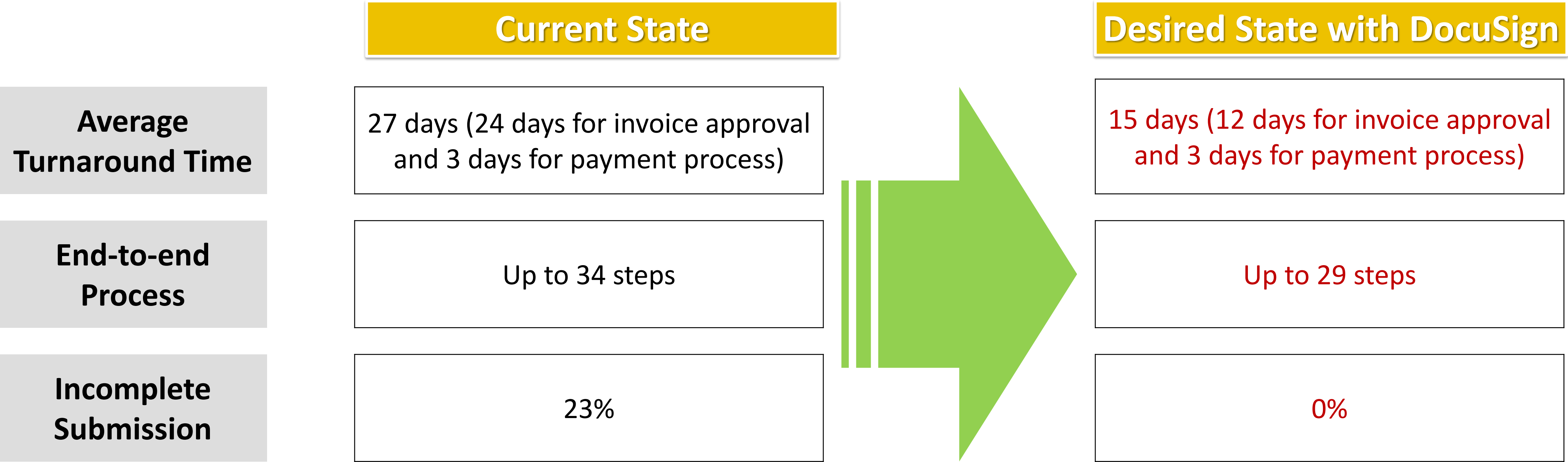
Fiscal Affairs



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

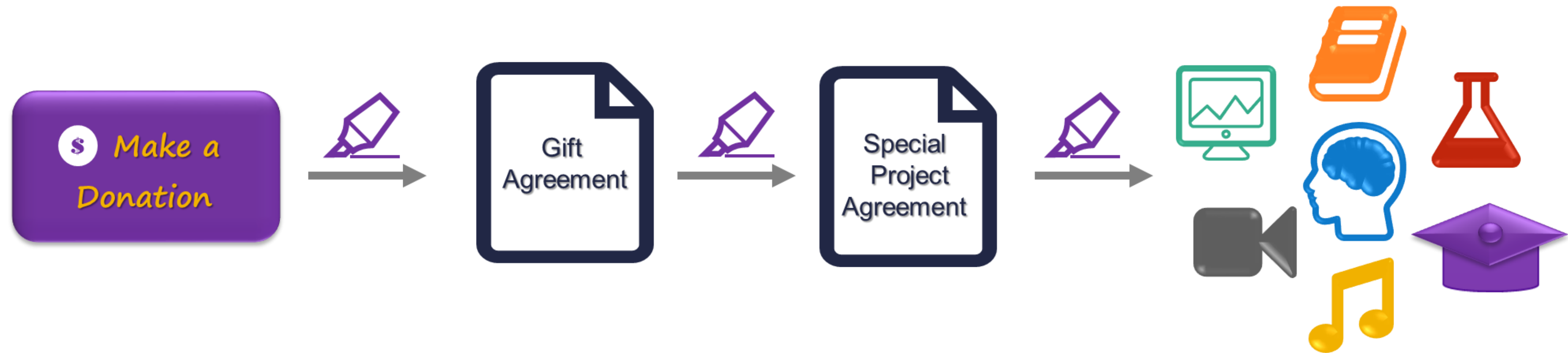
Quality Assurance reviewed a sample of **1500 invoices*** dated between July 2015 and December 2015:



* Data Source: San Francisco State University Imaging System

Case Study: Program Fund and Scholarship Donation

University Advancement & University Enterprises



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:

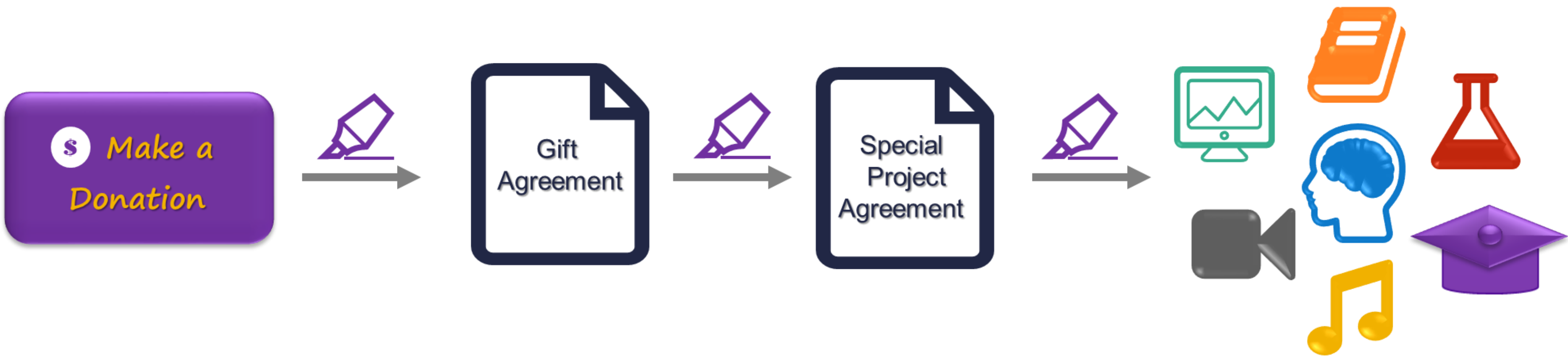
1. A sample of **41** University Corporation Gift Agreements*
2. A sample of **150** Special Project Agreements**

*Data Source: Gift Agreements Database.

**Data Source: Special Project Agreements Database.

Case Study: Program Fund and Scholarship Donation

University Advancement & University Enterprises



Current State

Desired State with DocuSign

Average Number of Signatures	5	6	5	6
Average Turnaround Time (days)	15 days	43 days	Less than 7 days	Less than 21 days

Total of 58 days

At most 28 days

Benefits to Faculty and Students

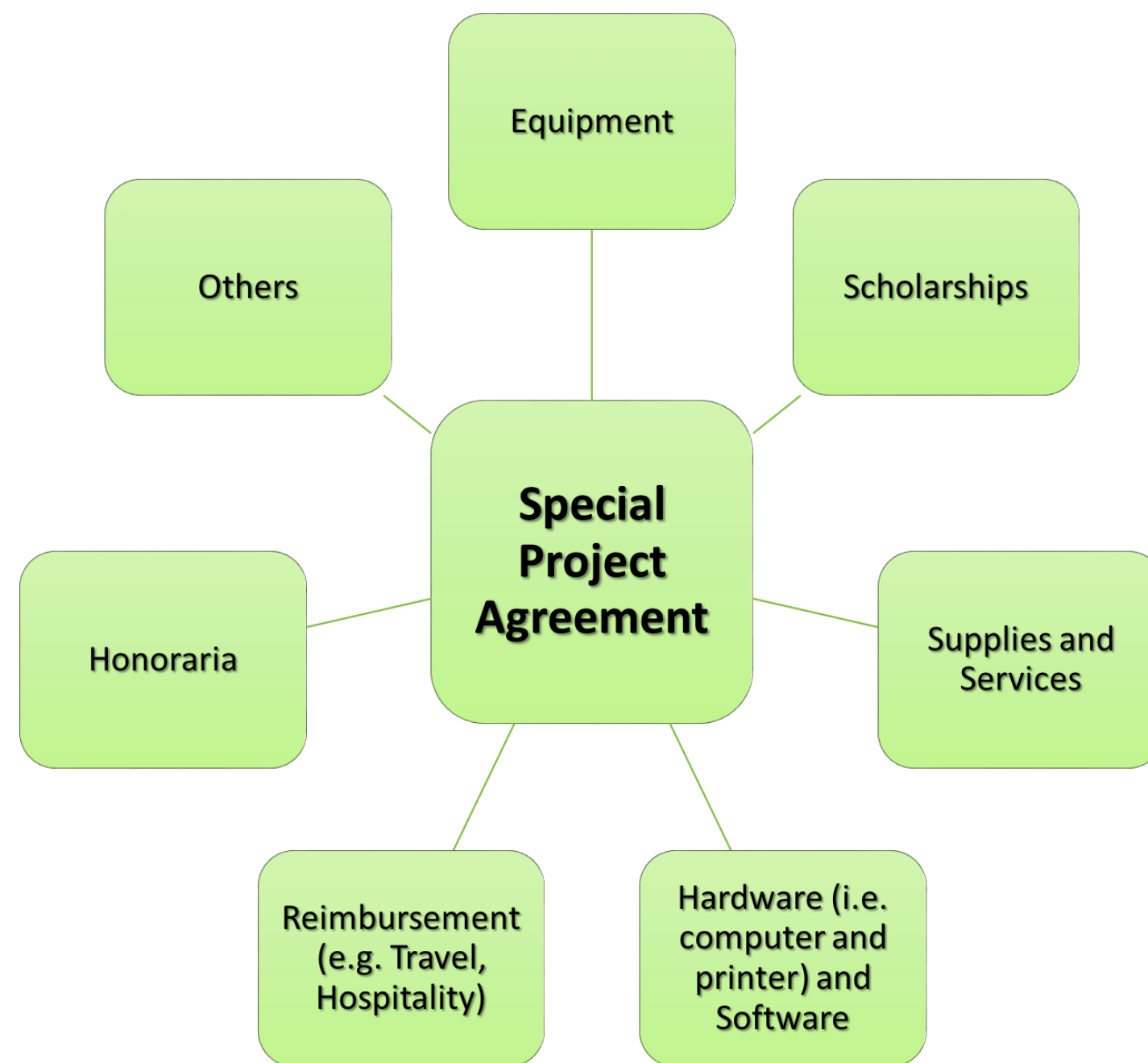
Electronic Signature Solution

Benefits to Faculty:

- ✓ Provide a streamlined and transparent approval process
- ✓ Allocate resources efficiently and effectively
- ✓ Improve academic support services

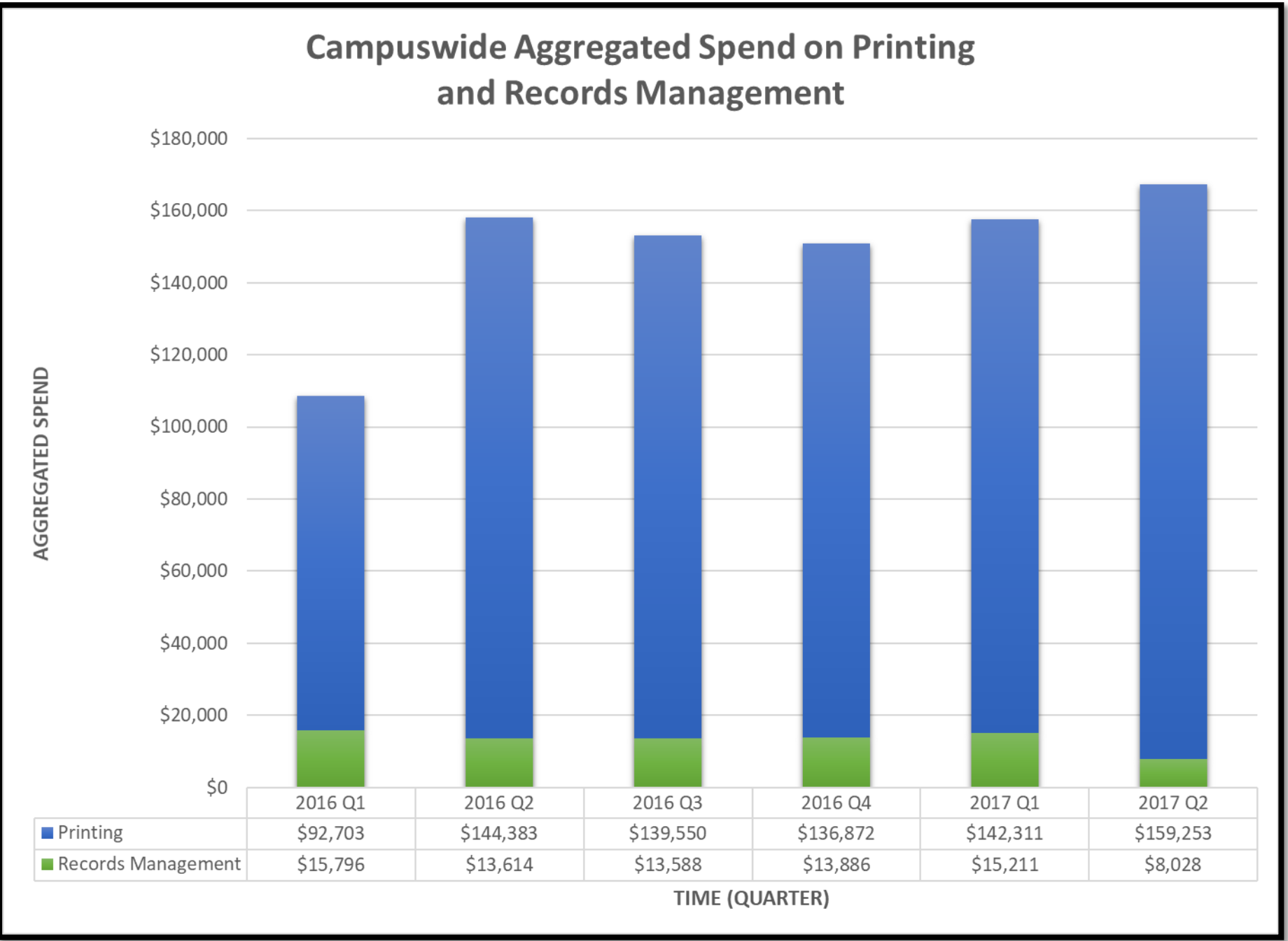
Benefits to Students:

- ✓ 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



Assessment: Paper Consumption

Aggregate Spend



Data Source: San Francisco State University Imaging System and Reprographics Program Summary

Distribution of Aggregated Spend on Printing and Records Management

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.

Approved Business Processes

Electronic Signature Risk Assessment

APPROVED PROCESS FOR DOCUSIGN USE (DEPARTMENT OWNER)

- | | |
|---|---|
| 1. Business Expense Reimbursement Form (<i>Accounts Payable</i>) | 20. Dock Notice (<i>Human Resources</i>) |
| 2. Alcohol Clearance Form (<i>Enterprise Risk Management</i>) | 21. Student Payroll Voucher (<i>Human Resources</i>) |
| 3. Trust and Special Project Agreement (<i>Fiscal Affairs</i>) | 22. Timeline Update Request (<i>Human Resources</i>) |
| 4. Chartfield Value Request Form (<i>Fiscal Affairs</i>) | 23. Authorization / Report for Extra Hours / Overtime Request Form (<i>Human Resources</i>) |
| 5. Invoice Approval Process (<i>Fiscal Affairs</i>) | 24. Position Description for Representative Staff (<i>Human Resources</i>) |
| 6. Space Rental Agreement (<i>Housing, Dining, & Conference Services</i>) | 25. Position Description for Non-Representative / Confidential Staff (<i>Human Resources</i>) |
| 7. Summer Conference Request Form (<i>Housing, Dining, & Conference Services</i>) | 26. Recruitment Request Form (<i>Human Resources</i>) |
| 8. Summer Conference Rental Agreement (<i>Housing, Dining, & Conference Services</i>) | 27. Recommendation to Hire Form (<i>Human Resources</i>) |
| 9. Event Questionnaire Form (<i>Housing, Dining, & Conference Services</i>) | 28. Campus Marketplace Form (<i>Procurement and Support Services</i>) |
| 10. Leave of Absence Request Form (<i>Human Resources</i>) | 29. PO Change / Finalization Form (<i>Procurement and Support Services</i>) |
| 11. Employee Performance Review Form, non-MPP (<i>Human Resources</i>) | 30. Standard Gift Agreement Template, SF State Foundation (<i>University Advancement</i>) |
| 12. Employee Performance Review Form, MPP (<i>Human Resources</i>) | 31. Standard Gift Agreement Template, University Corporation (<i>University Advancement</i>) |
| 13. Employee Performance Review Form, unit 4 (<i>Human Resources</i>) | 32. SF State Foundation Scholarship Endowment Agreement (<i>University Advancement</i>) |
| 14. CANRA Acknowledgement Form, Limited Reporters (<i>Human Resources</i>) | 33. SF State Foundation Non-Scholarship Endowment Agreement (<i>University Advancement</i>) |
| 15. CANRA Acknowledgement Form, Limited Reporters (<i>Human Resources</i>) | 34. University Corporation Scholarship Fund Agreement (<i>University Advancement</i>) |
| 16. CANRA Acknowledgement Form, General Reporters (<i>Human Resources</i>) | 35. University Corporation Scholarship Fund Agreement (<i>University Advancement</i>) |
| 17. Employment Verification Request (<i>Human Resources</i>) | 36. Gift Acceptance Form (<i>University Advancement</i>) |
| 18. Work Schedule (<i>Human Resources</i>) | 37. Donor Intent Form (<i>University Advancement</i>) |
| 19. Absence and Additional Time Worked Report (<i>Human Resources</i>) | 38. Advance Database Confidentiality Access and Compliance Form (<i>University Advancement</i>) |

As of October 2018, **38 business processes and their associated forms** are approved for DocuSign use and over 50 documents pending for review.

Looking to the Future

University Advancement



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.



Caroline Johansson

Senior Director of Advancement Services

Responsibilities include facilitating fundraising, gift processing, constituent tracking, relationship management, and fund management; and positioning front-line colleagues for success in relationships with donors and other supporters.

Looking to the Future

Human Resources

“

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

”

“

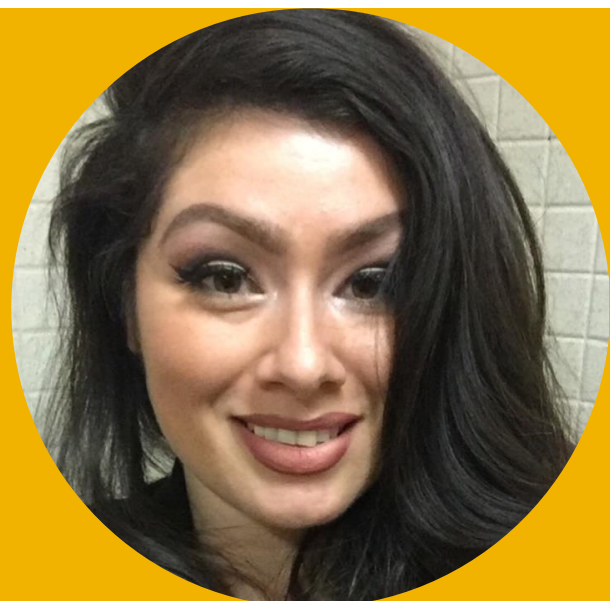
Using DocuSign will help with employee development and student involvement.
Students will learn more depth and breadth of Human Resources.

”

“

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.

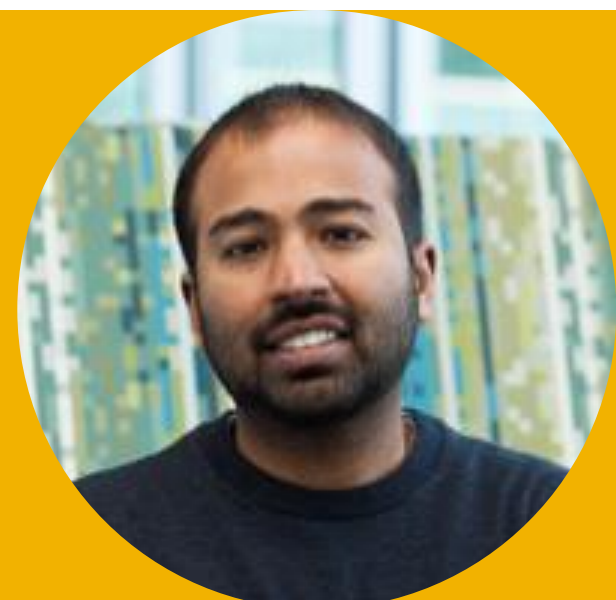
Looking to the Future

Disability Programs and Resource Center

“

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.

”



Avi Chandiramani

Accessible Technology Services Program Manager

Responsibilities include managing technology services provided by the DPRC and ensuring all aspects of campus technology are accessible to people with disabilities as part of the CSU Accessible Technology Initiative.

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.

DocuSign

Training and Upcoming Events

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 gateam@sfsu.edu.

Questions?

Contact Us



Quality Assurance
Vice President & CFO's Office
San Francisco State University
1600 Holloway Avenue
San Francisco, CA 94132



Phone
(415) 338 6602
(415) 405 7339
(415) 338 2717



Email
gateam@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

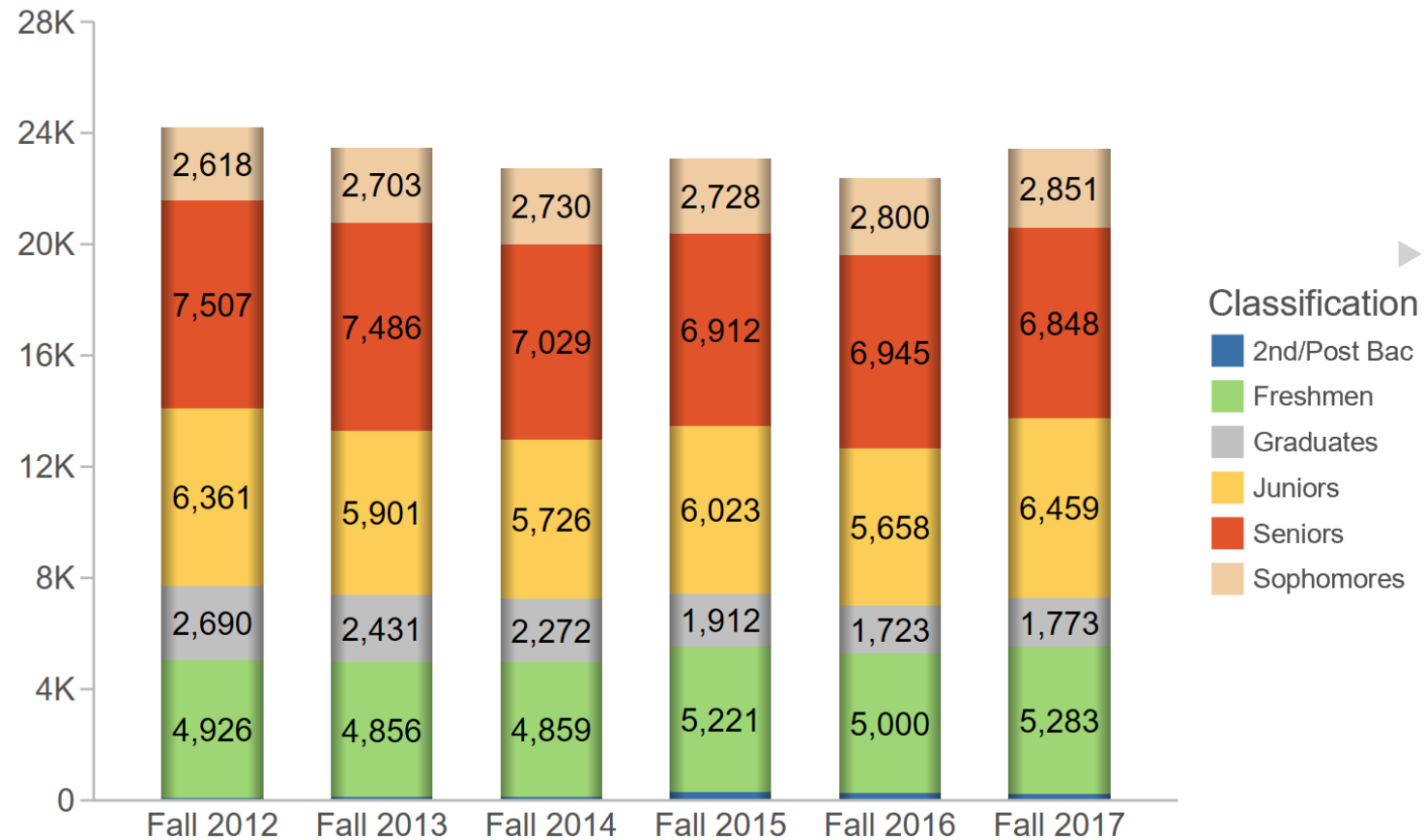
University Budget Committee
October 9, 2018

Local Area Outreach Enhancers: Scholarships for SF USD graduates

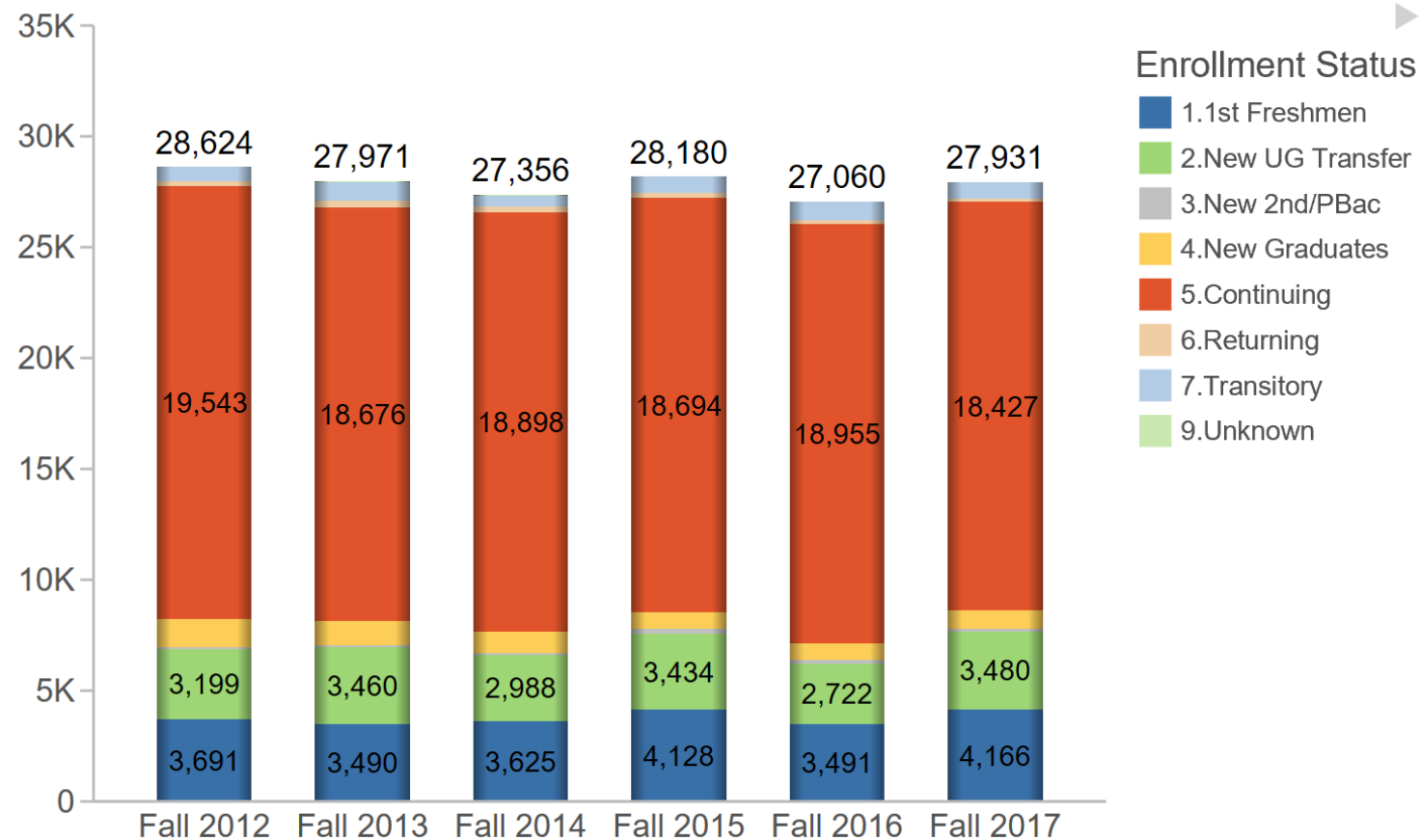
- Robert and Joyce Corrigan SF Promise
- Endowed Scholarship
 - \$2000 each academic year, up to 4 years
 - Any major; HS GPA of 3.0 or above
 - Targeted marketing has increased number of scholarships by 285% over 4-year period
- Elmira Sanderson Endowed Scholarship
 - \$1500 each academic year, up to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



CA Resident FTE By Enrollment Status



CA Resident Headcount By Enrollment Status



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



**A Degree With
A Guarantee.comSM**
Associate Degree for Transfer

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

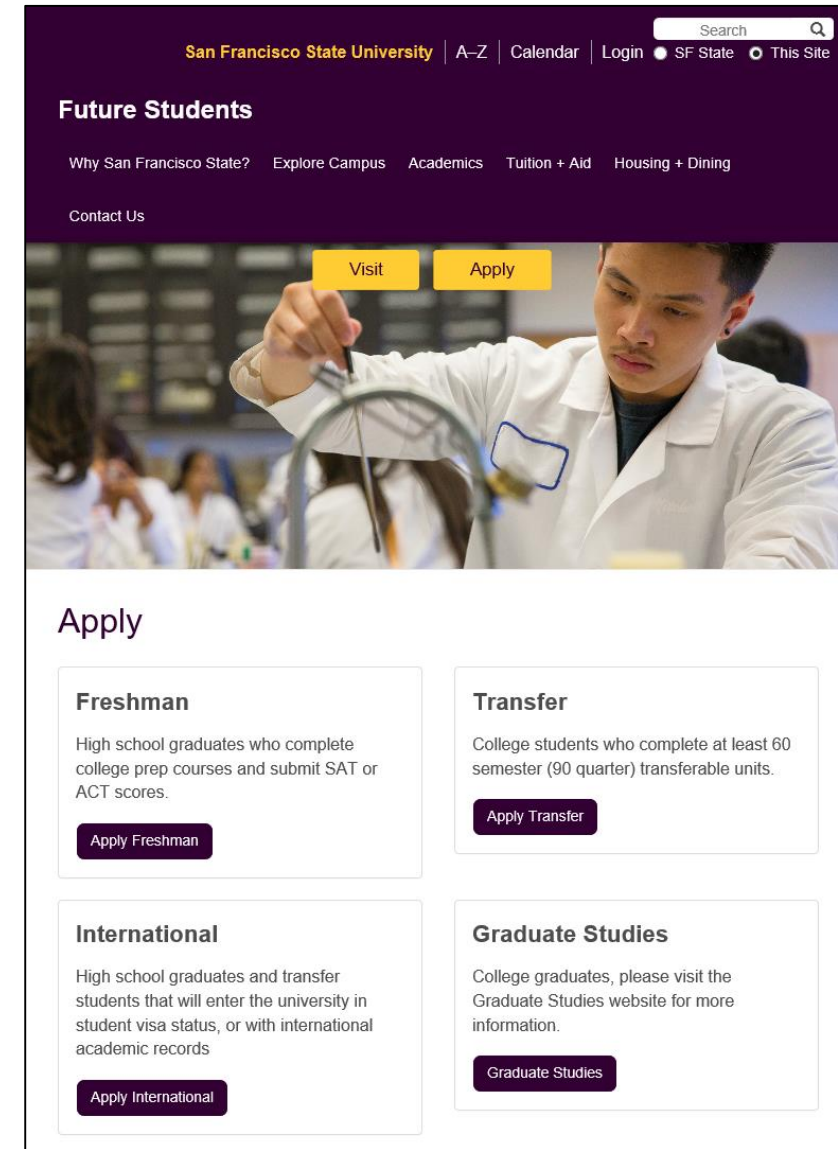


Ongoing Enrollment Management Strategies

- 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



The screenshot shows the 'Future Students' section of the San Francisco State University website. The header includes the university name, navigation links (A-Z, Calendar, Login), and search options. Below the header, there are links for 'Why San Francisco State?', 'Explore Campus', 'Academics', 'Tuition + Aid', and 'Housing + Dining'. A 'Contact Us' link is also present. A large image of a student in a lab coat is featured, with 'Visit' and 'Apply' buttons overlaid. The 'Apply' section is divided into four categories: Freshman, Transfer, International, and Graduate Studies, each with a brief description and an 'Apply' button.

San Francisco State University | A-Z | Calendar | Login ● SF State ○ This Site

Future Students

[Why San Francisco State?](#) [Explore Campus](#) [Academics](#) [Tuition + Aid](#) [Housing + Dining](#)

[Contact Us](#)

[Visit](#) [Apply](#)

Apply

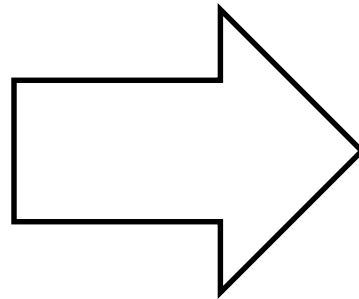
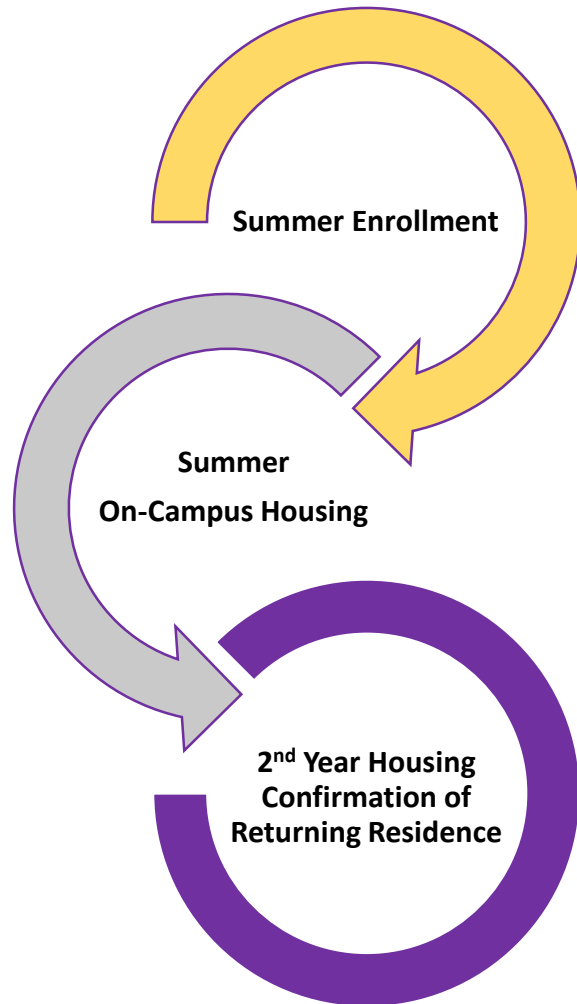
Freshman
High school graduates who complete college prep courses and submit SAT or ACT scores.
[Apply Freshman](#)

Transfer
College students who complete at least 60 semester (90 quarter) transferable units.
[Apply Transfer](#)

International
High school graduates and transfer students that will enter the university in student visa status, or with international academic records
[Apply International](#)

Graduate Studies
College graduates, please visit the Graduate Studies website for more information.
[Graduate Studies](#)

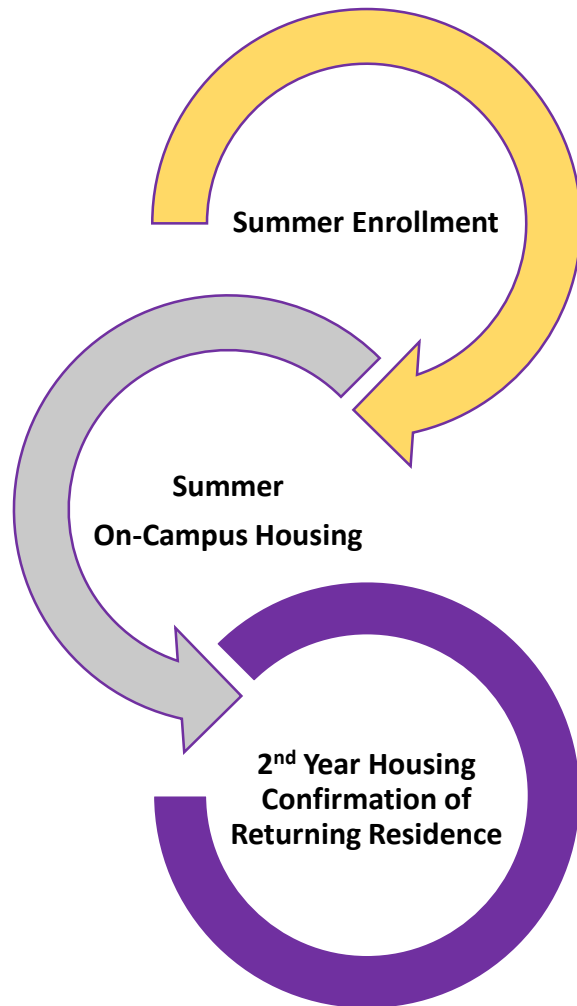
New Enrollment Management Initiative: Summer 2019



**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

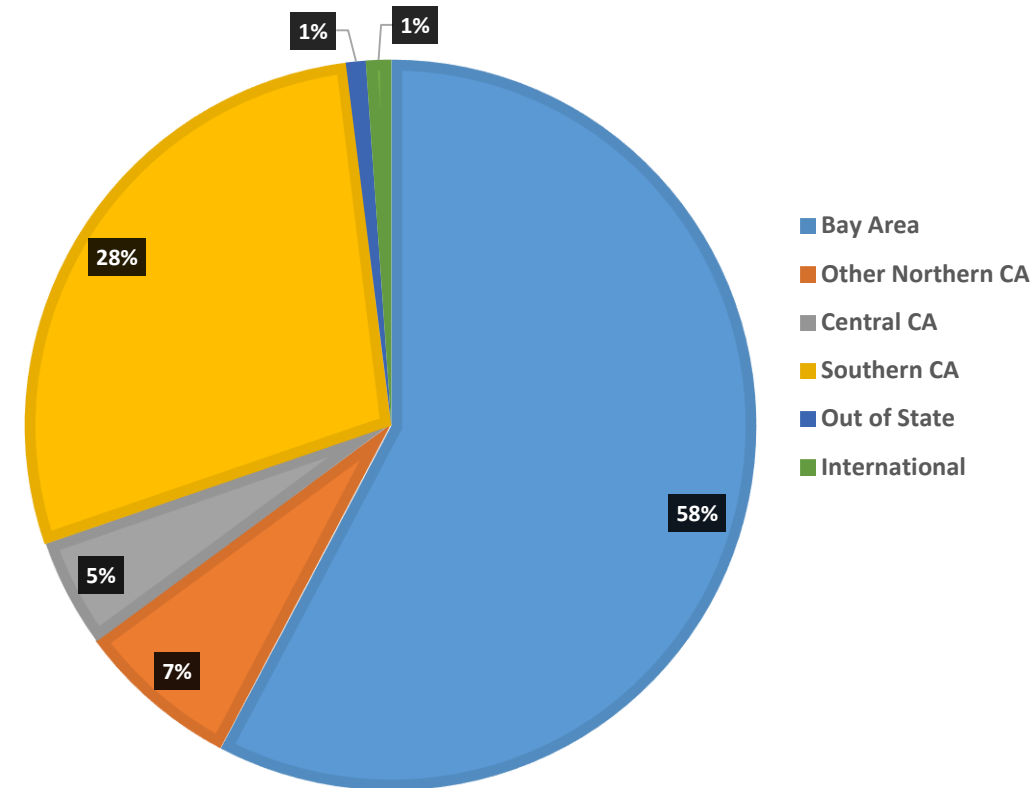
- **Transition to a new Accept-Admission-Offer model effective Fall 2019 cycle**
- Increase enrollment of adult students by partnering with the College of Extended Learning in recruitment events
- Increase enrollment by out-of-state students through participation in the National Student Exchange and 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

UNDERGRADUATE ENROLLMENT BY GEOGRAPHIC LOCATION



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:
 - Plan development begins Fall 2018
 - Draft of Plan to be completed by Fall 2019
 - 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.

