

University Budget Committee

July 27, 2018



Agenda

1. **Welcome and Announcements** (President Les Wong & VP Phyllis Carter)
2. **Approval of May 21, 2018 Meeting Minutes** (VP Phyllis Carter)
3. **2018/2019 Budget Update/Planning** (Exec. Director Elena Stoian)
4. **Status of Trust Fund Transition and Effects** (AVP Jeff Wilson)
5. **Funding Strategies for New Academic Buildings** (VP Jason Porth)
6. **SF State Campaign Update** (AVP Mark Kelleher)
7. **Open Forum**; Ten minutes, 3-minute limit per speaker
8. **UBC Committee housekeeping** (VP Phyllis Carter):
 - **Meeting topic review**; standing items, and new agenda items from Cabinets
 - **Meeting date selection for 2018/2019**, if best/sufficient for committee work:
 - **Mid October**: SF State's Enacted Budget Review
 - **3rd week January**: Mid-Year Review of SF State Budget & Gov Proposed Budget release
 - **Mid-March** (before break): SF State Budget Planning
 - **Late May** (before Commencement): Governor's Revised Budget release
 - **Late July**: Governor's Final Enacted Budget release
 - Faculty member term expiring; new one needed for **Fall '18 – Fall '21 term**

Welcome and Announcements

Les Wong
President

Phyllis Carter
Vice President & CFO
Administration & Finance

Approval of May 21st Minutes

Phyllis Carter
Vice President & CFO
Administration & Finance

2018/2019 Budget Update/Planning

Elena Stoian

Executive Director

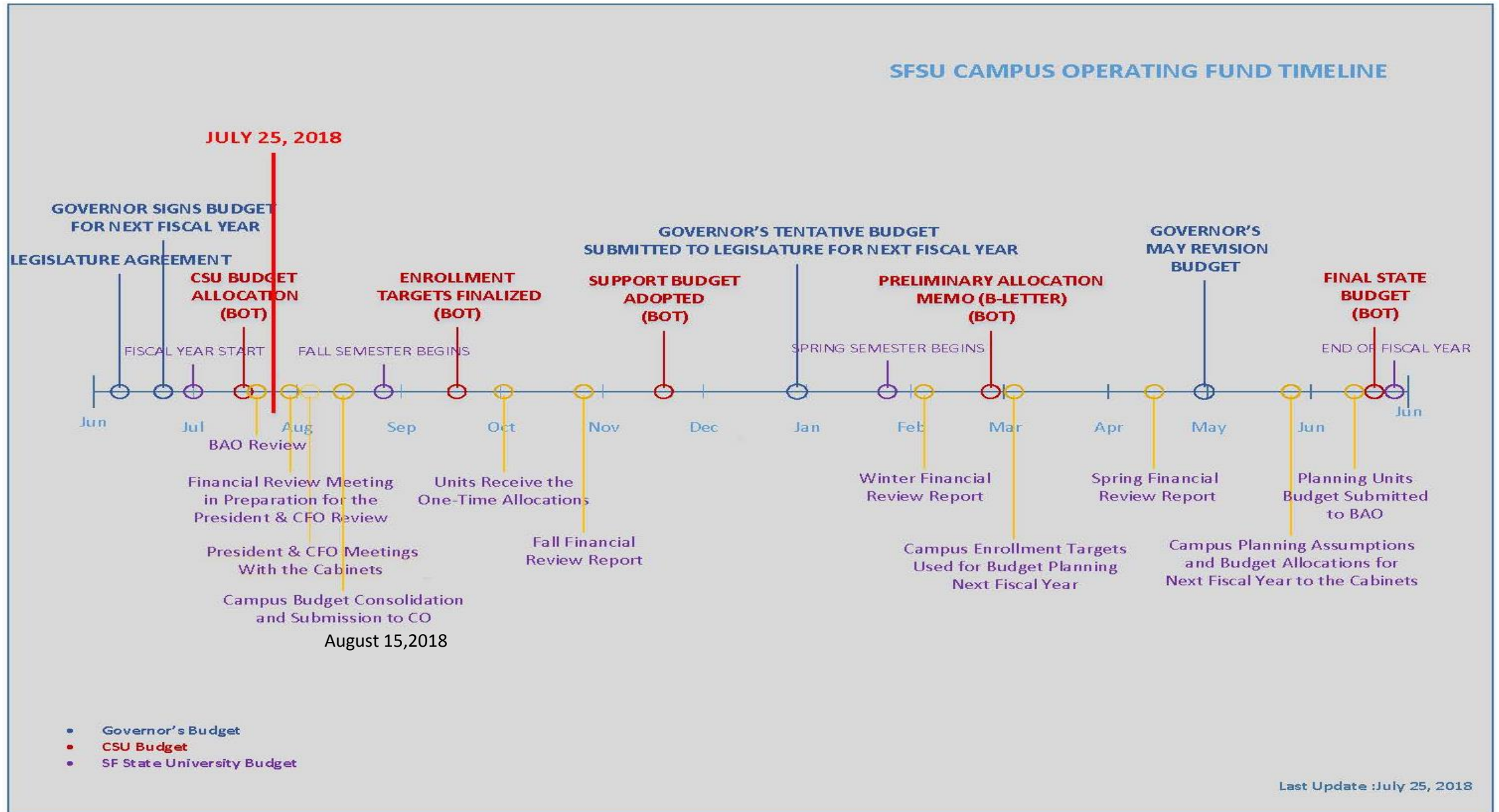
Budget Operations & Administration

Administration & Finance

SAN FRANCISCO STATE UNIVERSITY

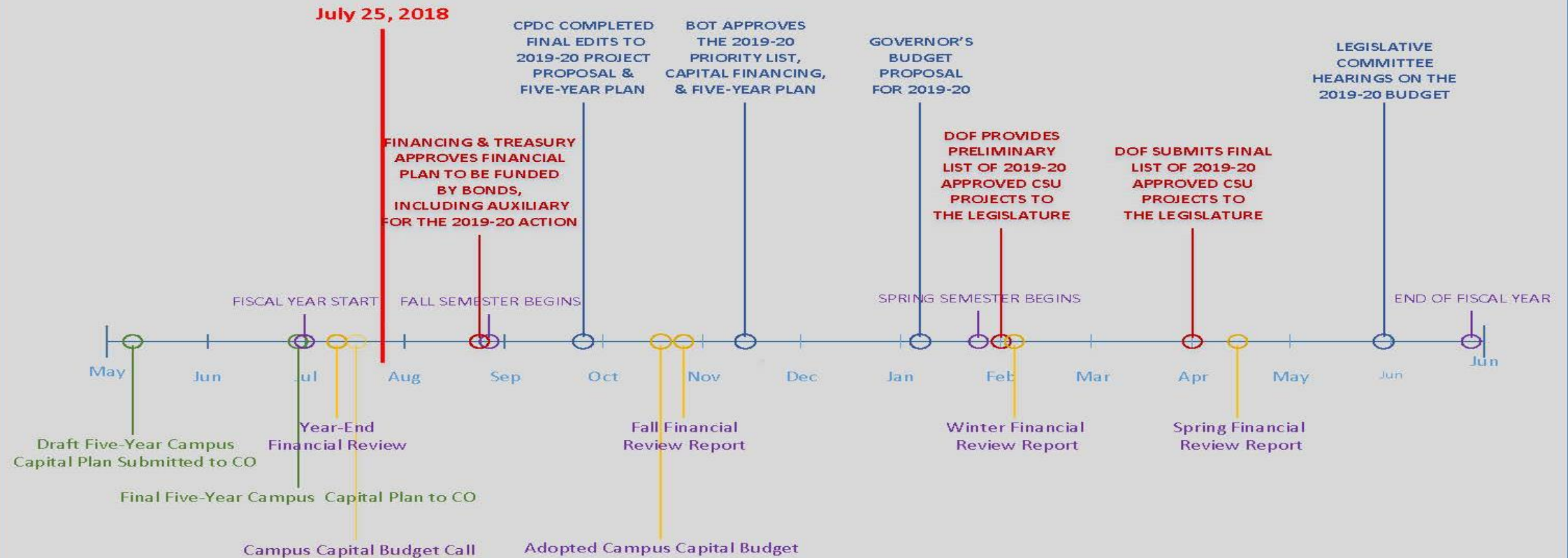
CAMPUS BUDGET TIMELINE

BUDGET TIMELINE CSU, GOVERNOR AND SFSU



CAPITAL BUDGET TIMELINE CSU AND SFSU

SFSU CAPITAL BUDGET TIMELINE



- Governor / Board of Trustees (BOT) / Chancellor's Office (CO) Capital Planning, Design and Construction (CPDC)
- Department of Finance (DOF) / Treasury
- SFSU Capital Planning
- Budget Administration & Operation (BAO)

Last Update: July 25, 2018

FY2018-19 SFSU BUDGET CALENDAR

TASK	DATE (SELF – SUPPORTED OPERATIONS)	DATE (OPERATING FUND)	RESPONSIBILITY	DELIVERABLES
PUBLISH PLANNING, ASSUMPTIONS, TOOLS, TEMPLATES	Distributed on April 27, 2018	Distributed on May 25, 2018	BAO	Budget Manual Budget Assumptions Allocations for the General Fund units (date TBD) Prepare “THE BUDGET WORKBOOK”
PLANNING UNITS BUDGET DEVELOPMENT	By 5p.m. on June 1, 2018	By 5p.m. on June 29, 2018	Planning Units Submit to BAO	“THE BUDGET WORKBOOK” (current Year for GF units) “THE BUDGET WORKBOOK” for Self-Supported Operations (CY budget plan and 4yrs forecasted budget)
BAO REVIEW	From June 4 to June 22, 2018 - <i>still in process due to late submissions</i>	From July 2 to July 27, 2018	BAO	Reviews submitted materials; follows-up with questions to Cabinets, develop key questions for Financial Review Meetings (shared with cabinets and VP’s)
FINANCIAL REVIEW MEETINGS IN PREPARATION FOR THE PRESIDENT & CFO REVIEW	Meetings scheduled from 7/27 to 8/7		Planning Units Business Managers and VPs CFO BAO	These sessions will allow the group an opportunity to understand the forecast and budget information provided by the units as well as the assumptions/factors used to build their forecast and budget.
MEETING WITH THE PRESIDENT AND CFO	After CFO and VPs review	After CFO and VPs review	VPs CFO President	VPs will present their budget plan including any new initiative requests for President’s review and approval
CAMPUS BUDGET CONSOLIDATION AND SUBMISSION TO CO	August 15, 2018		BAO	FIRMS Budget submission to Chancellor’s office Original Consolidated Budget upload
REVISED BUDGET APPROVAL AND UPLOAD	First quarter of fiscal year	First quarter of fiscal year	CFO VP’s President BAO	Allocations memo will be distributed to the campus cabinets that includes one-time allocations (PY commitments, Carry forward balances)

Notes:

Tasks Completed

Tasks to be Completed

SAN FRANCISCO STATE UNIVERSITY
2018-19 SFSU GENERAL FUND
FINAL ALLOCATIONS

2018-19 SUMMARY CSU BUDGET PLAN, GOVERNOR AND SFSU FINAL B MEMO 18-02 ALLOCATIONS

(In millions)

2018-19 CSU BUDGET PLAN		2018-19 GOVERNOR'S ENACTED BUDGET				SFSU B 18-02-Memo Final	
	Base		Base	One time	Total	Base	
Graduation Initiatives 2025	75.0		75.0		75.0	3.1	*
						SUG expense adjustment -2.3	
Compensation	122.0		92.1		92.1	9.9	
1% Enrollment Increase	40.0			120/4 yrs.	120.0	0	
Academic Facilities And Infr.	15.0			35	35.0	0	
Mandatory Cost Increase	31.0	CSU's Operational Costs	30.0		30.0	3.5	
		Other Programs **		6.3	6.3		
Total	\$283.0		\$197.1	\$161.3	\$358.4	\$14.2	

* -SUG 5% redistribution of \$2,395,200 that will add to the \$742,800 to SSGI 2025 to a total of \$3,138,000 (B-memo attachment C)-based on the campus revenue performance.

** \$3.8 million to support shark and beach research at CSU Long Beach, \$1 .5 million to support student hunger programs, and \$1 million to support the Mervyn Dymally Institute at CSU Dominguez Hills.

2018-19 SFSU GENERAL FUND BUDGET PLANNING B MEMO 18-02

(In millions)

Sources of Funds	Total
Funded Retirement adjustment	2.8
Mandatory Cost (health, dental, GSI)	10.6
State University Grant	-2.3
Student Success Graduation Initiatives 2025	3.1
Total Anticipated Sources	\$14.2

2018-19 SFSU GENERAL FUND BUDGET PLANNING B MEMO 18-02

(In millions)

Mandatory Costs			(\$)
Health			\$0.7
2017-18 State Funded Retirement Adjustment			\$2.9
Employee Compensation			
2017-18 Compensation (CSU Employees Union)		\$3.1	\$9.9
2018-19 Compensation (*)		\$6.8	
2018-19 General Fund Increase			\$13.5

(*) w/o units SUPA Police association R08 and UAW academic student employees R11

2018-19 SFSU GENERAL FUND BUDGET PLANNING B MEMO 18-02

(In thousands)

Graduation Initiatives 2025

	CSU	SFSU
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Base increase per campus (\$960K)	\$24,000	\$960
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Based on each campus eligible students for Pell Grants (5.7% of total)	26,000	1,500
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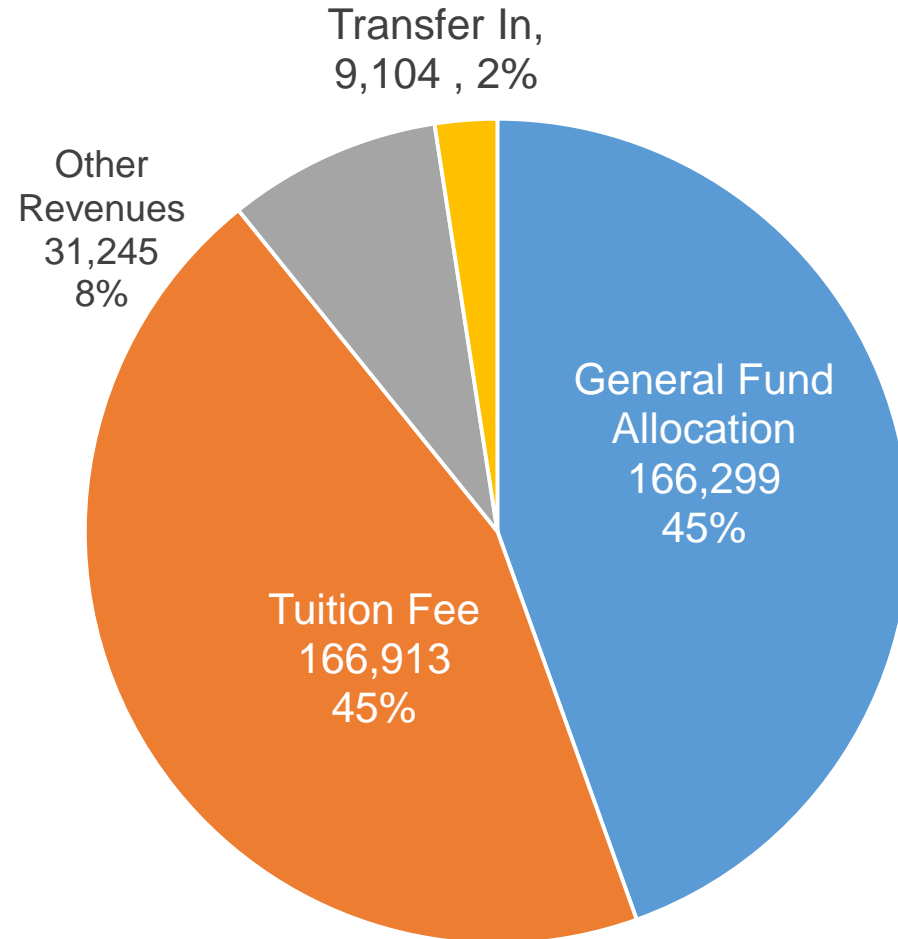
Tenure-track recruitment- retention (TT ratio above 65%)	25,000	678
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2018-19 General Fund Increase		\$3,138
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2018-19 PRELIMINARY GENERAL FUND BUDGET

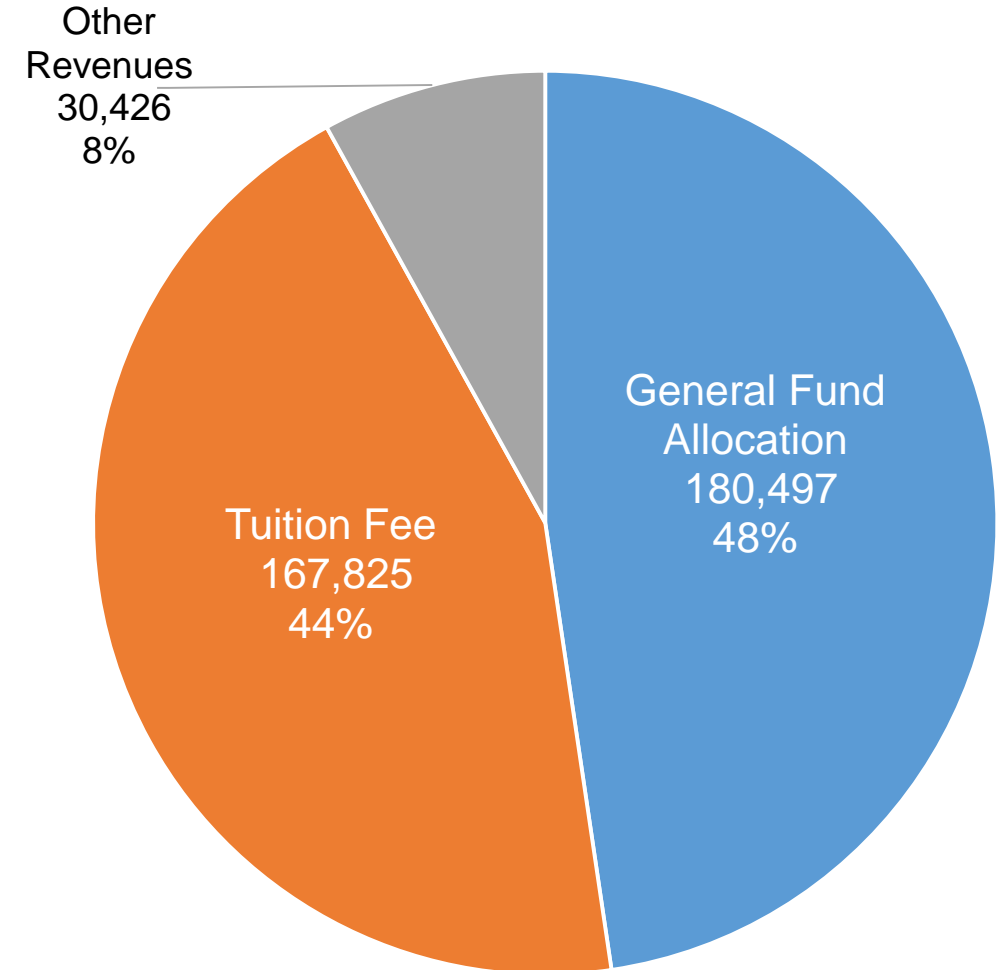
SFSU GENERAL FUND BUDGET-SOURCES OF REVENUE

2017-18 Actuals



TOTAL : \$374 M

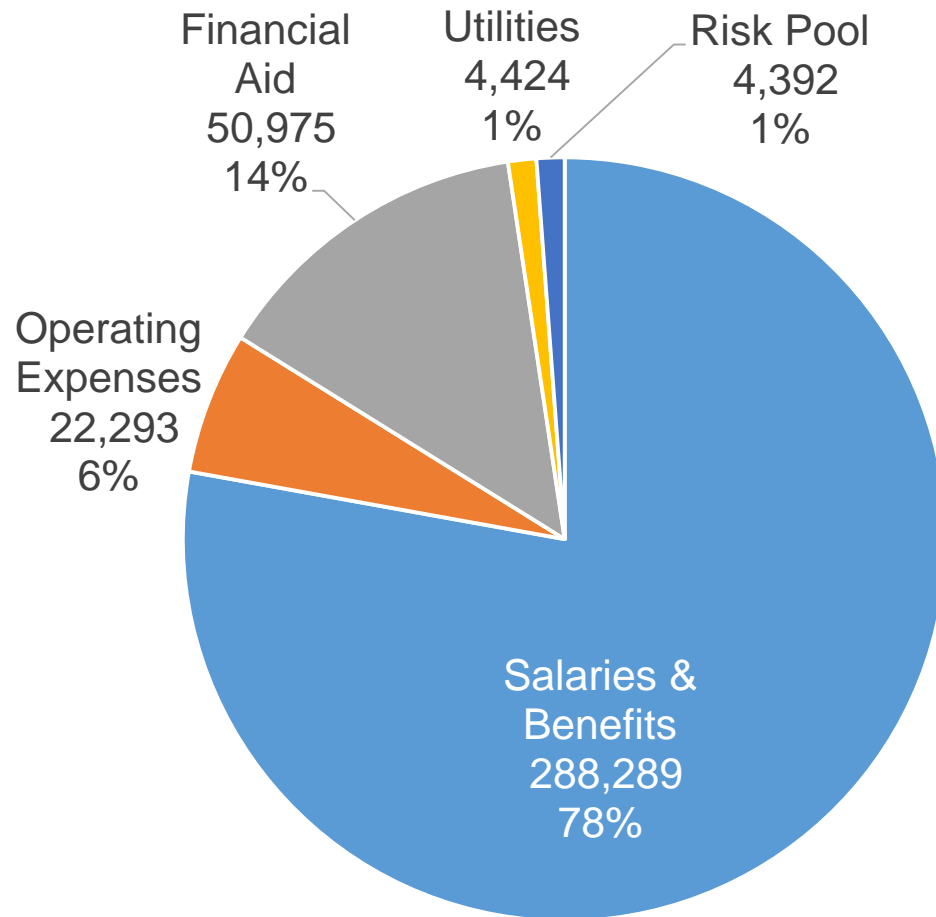
2018-19 Preliminary Budget



TOTAL : \$379 M

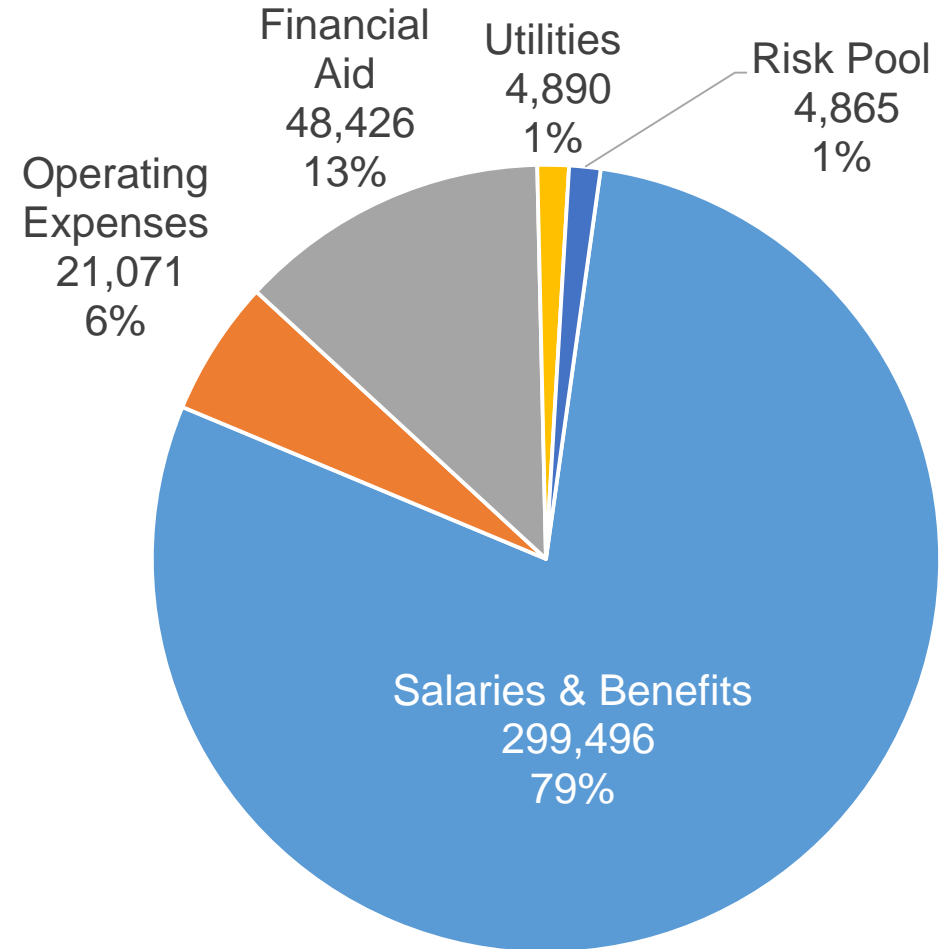
SFSU PRELIMINARY GENERAL FUND OPERATING -USES

2017-18 Actuals



TOTAL: 2017-18 ACTUALS \$370 M

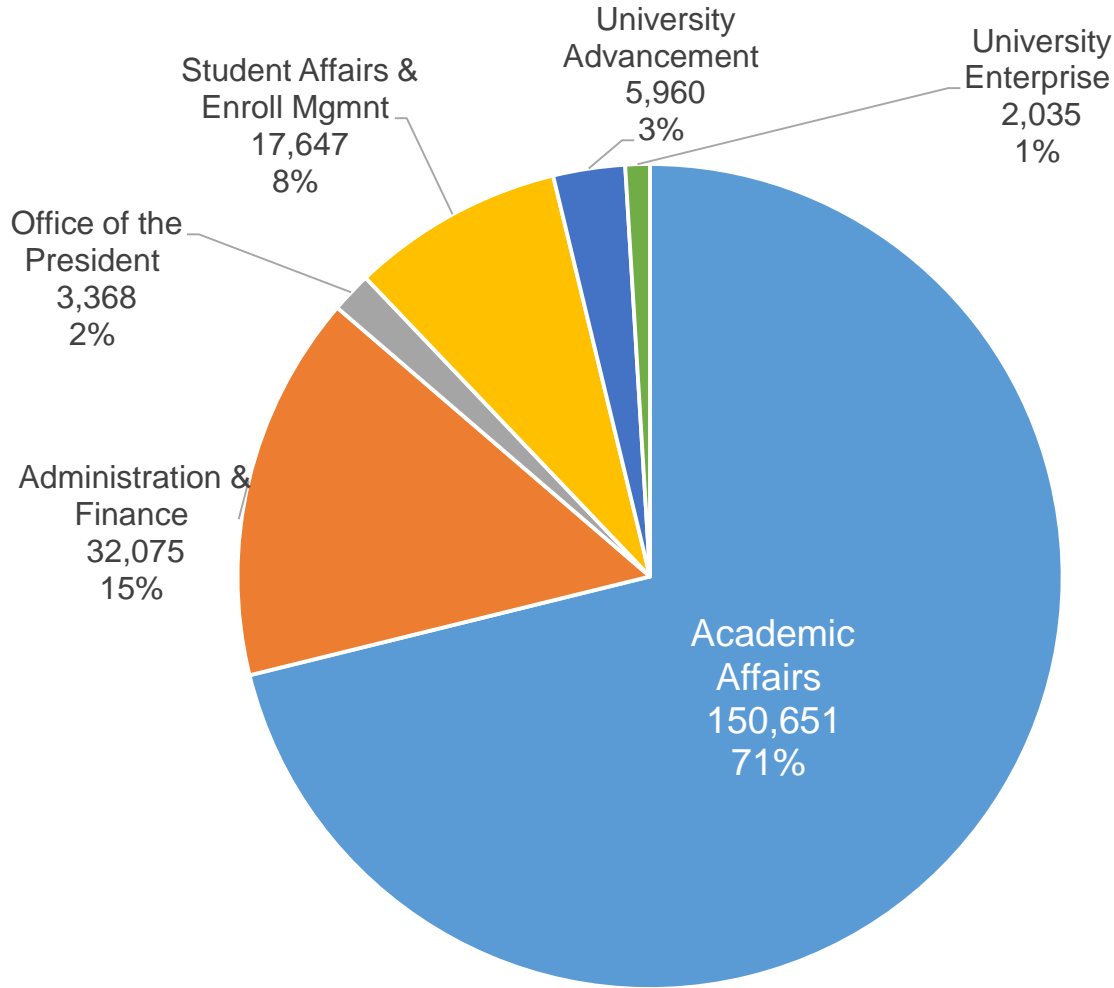
2018-19 Preliminary Budget



TOTAL: 2018-19 BUDGET \$379 M

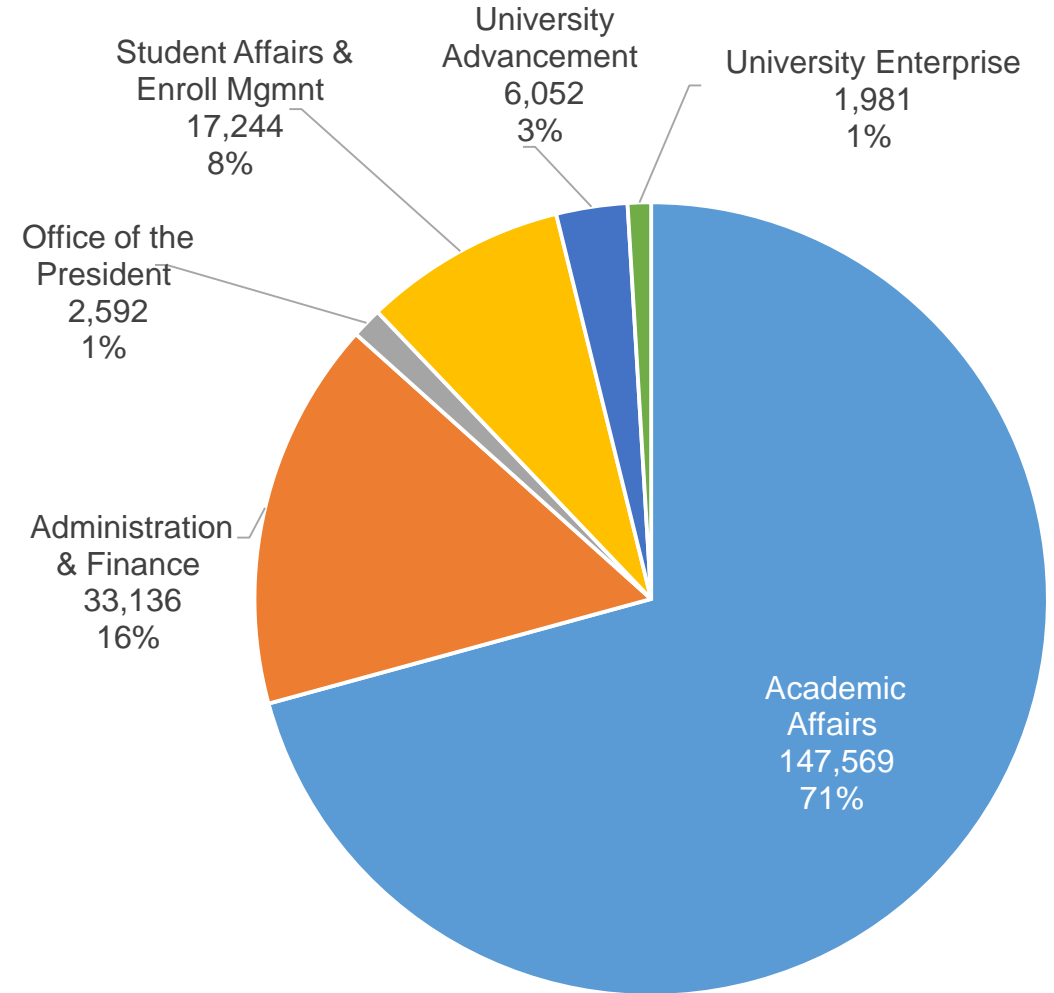
SFSU PRELIMINARY GENERAL FUND CABINET OPERATING BUDGET EXPENDITURES

2017-18 Actuals



TOTAL CABINETS 2017-18 ACTUALS \$212 M

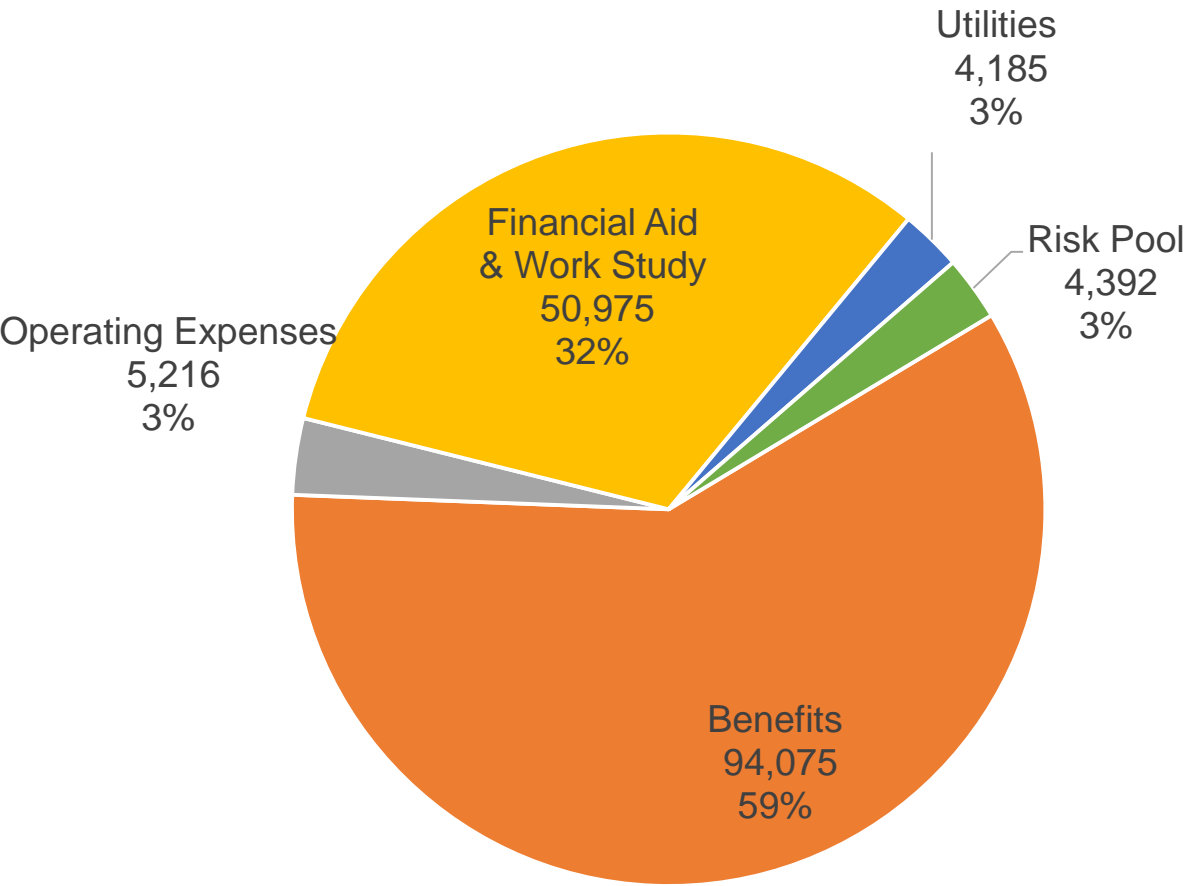
2018-19 Preliminary Budget



TOTAL PRELIMINARY CABINET ALLOCATIONS: \$209 M

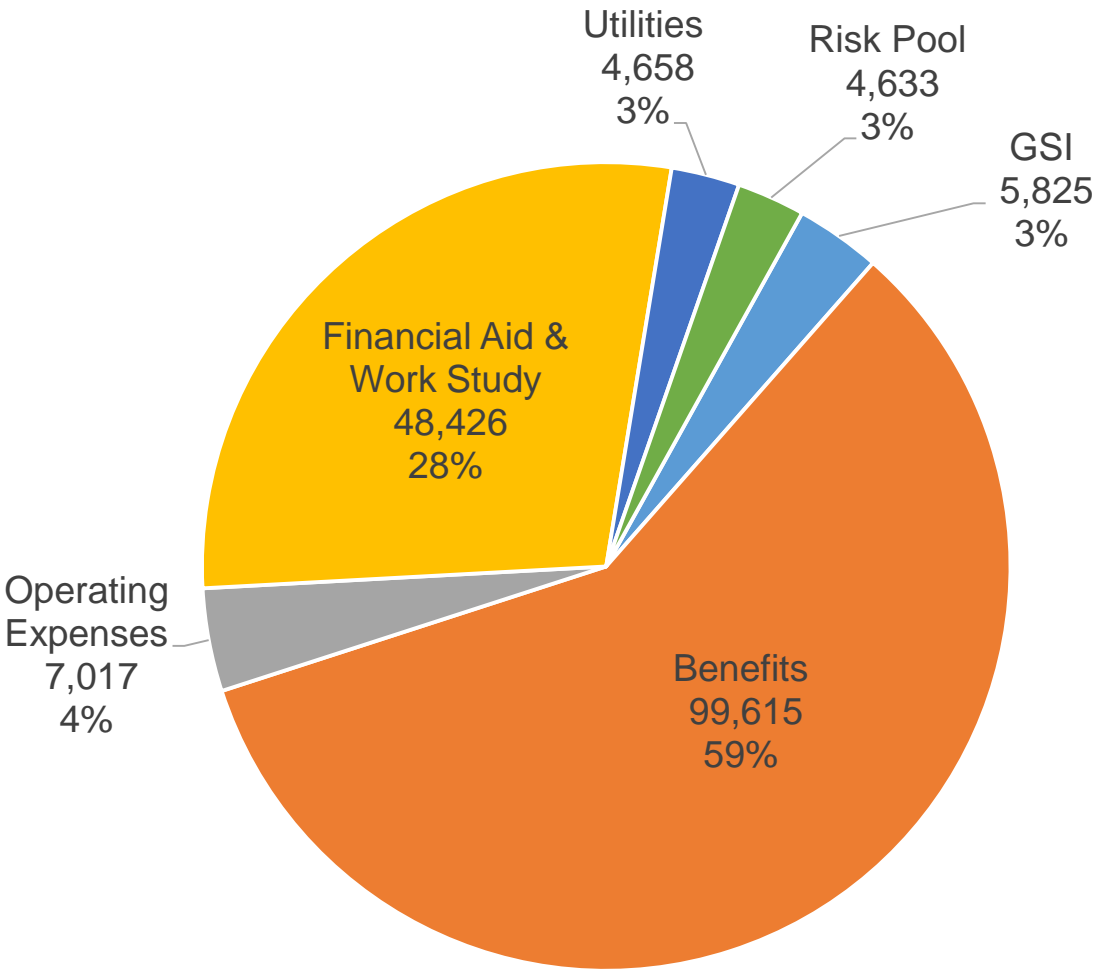
SFSU PRELIMINARY GENERAL FUND UNIVERSITY WIDE OPERATING BUDGET EXPENDITURES

2017-18 Actuals



CAMPUS WIDE CABINET 2017-18 ACTUALS \$158 M

2018-19 Preliminary Budget



CAMPUS WIDE CABINET PRELIMINARY USES : \$170 M

WHAT'S NEXT.....

- Review Meetings with Planning Units Business Manager, VPs, CFO and BOA on the budget request
- Meeting with the CFO ,VP's and President on additional funding and approval of units budget request
- August 15,2018 final submission of FY2018-19 SFSU Budget to CO
- Loading FY2018-19 original budget by end of August
- 2018-19 Capital Budget and its 5 yr. Plan
- Target revised budget allocation end of September
- Campus wide budget presentations and forums on budget

Status of Trust Funds Transition and Effects

Jeff Wilson

Associate Vice President

Fiscal Affairs

Administration & Finance

Status of Trust Fund Transition and Effects

University Budget Committee

July 27, 2018

Status of Trust Fund Transition and Effect

Background

- The Chancellor's Office (CO) Financial Services department directed all campuses to review the activities contained in **CSU Funds 491 and 496** and determine if those activities are appropriate for the relevant CSU fund.
- Activities are recorded in SFSU PeopleSoft funds which rollup to CSU funds.
- The Budget Administration Office and Fiscal Affairs performed the analysis of each SFSU PeopleSoft fund housed in **CSU funds 491 and 496**.
- This analysis was performed according to guidance provided by the CO's Management and Accounting Practices Office and the CSU's Financial Standards Advisory Committee (FSAC).

Status of Trust Fund Transition and Effect

CSU fund 485 – Primary operating fund of the CSU; student tuition and fees and state appropriation are administered through this fund; *typical SFSU PeopleSoft funds in CSU Fund 485 include NG###, NR###, and TS### funds.*

CSU fund 491 – Used to record the costs of capital projects with unrestricted sources of monies; *typical SFSU PeopleSoft funds in CSU Fund 491 include SP### and ST### funds.*

CSU fund 496 – Used for activities not recorded in any other CSU fund; activities are revenue self-supporting and there would be no impact on the University's primary operations if the activity was discontinued; *typical SFSU PeopleSoft funds in CSU Fund 496 include TR### and TT### funds.*

Status of Trust Fund Transition and Effect

Methodology (Decision Tree)

- Is the fund's revenue source from state appropriation of approved fee? (CSU Fund 485)
- Is activity listed in CSU Fund 496 definition? (CSU Fund 496)
- Is revenue for recovery or abatement of essential CSU Fund 485 expenses? (CSU Fund 485)
- Is revenue sustainable and self-supporting? (CSU Fund 496)
- Is activity listed in CSU Fund 485 definition? (CSU Fund 485)

Status of Trust Fund Transition and Effect

Campus Timeline – Analysis and Planning

<u>Item</u>	<u>Timeline</u>	<u>Responsibility</u>
Analysis of campus funds	January – February 2018	Fiscal Affairs, Budget
Finalize treatment of each fund	March 2018	Fiscal Affairs, Budget
Communicate changes to campus	March – April 2018	Colleges, divisions, Fiscal Affairs, Budget
Receive feedback from campus; answer questions; provide support to campus	April – May 2018	Fiscal Affairs, Budget

Status of Trust Fund Transition and Effect

Campus Timeline – Implementation

<u>Item</u>	<u>Timeline</u>	<u>Responsibility</u>
Close inactive funds	By May 30, 2018	Fiscal Affairs
Position changes, outstanding requisitions, accounts receivable review and resolution	By May 30, 2018	Departments, Fiscal Affairs, Procurement, Budget
Issue new funds; set up related subsystem structure	June 1, 2018	Fiscal Affairs
Transfer existing balances to new codes	June 30, 2018	Fiscal Affairs

Status of Trust Fund Transition and Effect

Financial Effects

Total funds subject to review:	266
Total <u>fund balance</u> in funds subject to review:	\$30,464,302
Total funds determined to be correctly classified in CSU Fund 491 and CSU Fund 496:	74
Total <u>fund balance</u> in funds determined to be correctly classified:	\$7,045,626
Total funds determined to belong in another CSU Fund	192
Total <u>fund balance</u> of funds determined to belong in another CSU Fund:	\$23,418,676

Status of Trust Fund Transition and Effect

Financial Effects

Cabinet

Academic Affairs

Administration & Finance

Advancement

President's Office

Student Affairs & Enrollment Mgt.

University Enterprises/CPDC

From CSU Funds 491
and 496 to CSU Fund 485

\$17,074,255

2,976,566

173,079

56,653

217,814

353,301

From CSU Funds 491
to CSU Fund 496

\$1,090,424

1,316,924

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159,660

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Status of Trust Fund Transition and Effect

Financial Effects

<u>Description</u>	<u>Amount transferred to CSU Fund 485</u>
Reimbursed Release Time (NR101)	\$3,862,479
Recovered Indirect Costs (NR201)	9,134,397
Cost Recovery (NR301)	702,365
Programs and Initiatives (NR401)	6,514,099
Mini-grants (SG101)	852,111

Status of Trust Fund Transition and Effect

Financial Effects

Reserve for financial uncertainty in CSU Fund 485

- June 30, 2017 \$23,303,033
- June 30, 2018 \$43,536,278

Status of Trust Fund Transition and Effect

Current activities

- Responding to questions from departments
- Ensuring funds landed in the correct CSU Fund

2018-2019 - Transitional year

- Assist departments in monitoring activities in CSU Fund 485
- Prepare departments for budget planning for all CSU Fund 485 funds (2019-2020)
- NR401 – Spend down – to be completed by June 30, 2020 or moved back to NG001

Open item

- CSU Hospitality policy

Questions?



Fiscal Affairs

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Funding Strategies for New Academic Buildings

Jason Porth
Vice President
University Enterprises

University Budget Committee Funding of Academic Buildings July 27, 2018



STATE FUNDED

2006 HVAC Renewal Phase III - Campus Wide	\$1,600,000
2006 HVAC Renewal Phase II-Fine Arts, Psych, Gym & Sci.	\$1,530,000
2006 Minor Cap: Energy Lighting Incentive	\$270,980
2006 Minor Capital Outlay	\$984,000
2006 JPL Library Renovation & Expansion	\$108,079,000
2007 SOTA Acquisition	\$12,382,000
2007 Nursing Facility Improvements	\$1,459,000
2007 CCSC Renovation & Computer Lab	\$649,400
2007 Telecom. Infrastructure Renewal	\$9,308,000
2007 HVAC Renewal TH, Gym, & C.A.	\$3,910,000
2007 Fire Alarm, Gym & Roof	\$57,209
2007 Minor Capital Outlay	\$1,157,000
2008 HVAC Renewal Phase IV - Fine Arts Controls	\$91,000
2014 Wireless Smart Controller Irrigation	\$320,880
2015 Science Labs Renovation	\$8,115,000
2015 Electrical Substation Replacement	\$3,475,000
2015 RTC Electrical Upgrade	\$982,000
2015 Emergency Phones Campus Wide	\$385,000
2016 Replace 12KV Feeders Campus Wide	\$960,000
2016 Replace 12KV Feeders at Substation	\$350,000
2016 Gas Line Replacement Campus Wide	\$800,000
2017 BECA*	\$58,064,000
2017 Electrical Substation Second Allocation	\$805,000
2017 Increase Fire Hydrant Coverage CW	\$1,048,000
2017 RTC Bldg. 49 & 50	\$2,148,000

\$218,930,469

CAMPUS FUNDED

2010 Lot 20 Seismic	\$3,683,712
2015 Mashouf Wellness Center	\$86,487,000
2017 BECA (campus share)	\$23,080,000
2017 Holloway Student Housing / Mixed-Use	\$102,124,000

\$215,374,712

SUM \$434,305,181

Five-Year Facilities Renewal and Capital Improvement Plan
(Dollars in 000s)

SAN FRANCISCO

Deferred Maintenance, Renewal and Improvements

Project	CAT	Funds	2019/20	2020/21	2021/22	2022/23	2023/24	GHG ¹
Ethnic Studies/Psychology Elevator Modernization	IA	Campus-M SRB-AP	329 2,961					
Thornton Hall Sprinkler System and Fire Alarm	IA	Campus-M SRB-AP	1,982 2,177					
Hensill Hall Sprinkler System and Fire Alarm	IA	Campus-M SRB-AP	449 4,044					
Fire Hydrants Campuswide, Ph. 2	IA	Campus-M SRB-AP	109 985					
Tiburon -- Seismic, Infrastructure, ADA, and Modernization Upgrades	IA	Campus SRB-AP	353 3,530					
Fire Alarm Replacement Fine Arts	IA	Campus-M SRB-AP	112 1,006					
Central Plant/Campus Utility Risk Projects	IA	Campus-M SRB-AP	191 1,723					
Data Center Emergency Power and Condenser	IA	Campus-M SRB-AP	106 953					
LED Streetlight Retrofit, Ph. 2	IA	Campus-M C&T	131 1,181					
Fire Alarm Repair, ADA	IA	Campus-M SRB-AP	120 1,080					
Portable Generator Quick Connects	IA	Campus-M SRB-AP	207 1,856					
Sanitary Sewer/Storm/Domestic Water Risk Projects	IA	Campus-M SRB-AP	265 2,380					
Business Building Heating System Replacement	IA	Campus-M SRB-AP	251 2,264					
Thornton Hall ADA Restroom Upgrade	IA	Campus-I SRB-AP	165 1,488					
Cox Stadium, Creative Arts, Business ADA Restroom Upgrade	IA	Campus-I SRB-AP	175 1,570					
Infrastructure Improvements	IA	Campus-I SRB-AP	PW 4,945 C 29,198	PW 90 C 8,910	PW 90 C 8,910	PW 90 C 8,910	PW 90 C 8,910	
Totals			\$70,143	\$34,143	\$9,000	\$9,000	\$9,000	0

Academic Projects

Academic Projects													
Project	CAT	Funds	2019/20		2020/21		2021/22		2022/23		2023/24		GHG ¹
Science Replacement Building	IB	Campus-I SRB-AP	PW 5,073 PW 6,117		C 23,133 C 45,959		C 23,133 C 45,959		E 1,650 E 3,300		E 1,650 E 3,300		155
Thornton Hall Renovation	IB	Campus-I SRB-AP	S 500		P 4,705		W 4,871				E 1,000		-239
							C 132,582						
HSS South Classroom Replacement	IB	Campus-I SRB-AP					P 4,574		W 4,714		E 2,571 C 171,843		-433
HSS North Classroom Replacement	IB	Campus-I SRB-AP							P 2,707		WE 4,429 C 96,337		-374
Totals	\$319,323			\$11,690	\$73,797		\$78,537		\$144,953		\$281,130		-891

Self-Support / Other Projects

Project	CAT	Funds	2019/20	2020/21	2021/22	2022/23	2022/23	GHG ¹
Lower Valley Housing, Ph. 1	II	SRB-SS		PWCE 375,641				368
Lower Valley Housing, Ph. 2	II	SRB-SS			PWCE 204,830			365
Totals			\$580,471	\$0	\$375,641	\$204,830	\$0	733

Greenhouse Gas Emissions (Metric Tons of CO ₂)	Current GHG	2019/20	2020/21	2021/22	2022/23	2022/23	Net Change
Net Change Due to Projects	18,007		155	-433	-374	0	-158
Greenhouse Gas Emissions with Net Changes		18,007	18,162	17,729	17,355	17,355	

¹ Greenhouse Gas Emissions

A = Acquisition P = Preliminary Plans W = Working Drawings C = Construction E = Equipment S = Study

Category and Fund codes: Reference the Project Category and Fund Types section in The Basis of the Capital Outlay Program.

	2020 Goal	2020 Goal
	16,911	16,911
	2040 Goal	2040 Goal
	3,382	3,382



Liberal & Creative Arts Building: San Francisco State University

Project Architect: Mark Cavagnero Associates

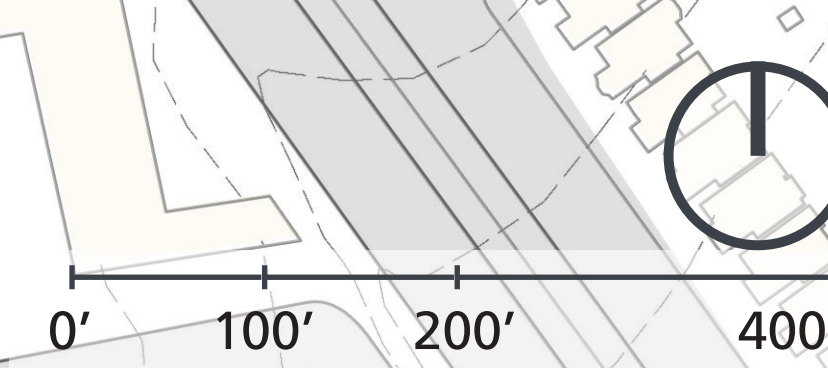
Construction Management at Risk Contractor: McCarthy Building Companies, Inc.

Project Cost: \$81 million

Funded by CSU \$58 million

Funded by SF State \$3 million

Balance \$20 million



PROGRAM

	Now	+ Net New	= Future
Enrollment	25,000 FTE	5,000 FTE	30,000 FTE
Academic	1.5M GSF	400K GSF	1.9M GSF
Student Housing	3,500 beds	9,000 beds	12,500 beds
Non-Student Apartments	500 units	700 units	1,200 units
Student Life + Support	920K GSF	670K GSF	1.6M GSF
Semi-Public	30K GSF	655K GSF	685K GSF
Indoor Athletics	163K GSF	3K GSF	166K GSF
Outdoor Athletics	10.4 Ac	-1.4 Ac	9 Ac
Recreation	4 Ac	1 Ac	5 Ac

DRAFT

Funding Sources

Philanthropy

- Mashouf Wellness Center
- New Science

SRB

System-Wide Revenue Bonds

- Academic buildings
- Housing
- LCA Project
- New Science

P3

Public-Private Partnerships

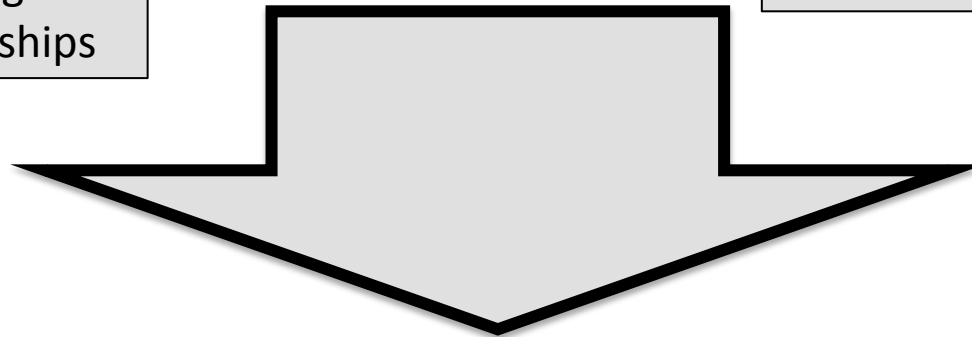
- Holloway Mixed-Use Project (No state funds)
- New Science

New Approaches

- Campus Financing
- Auxiliary Partnerships

Student Fees

- Mashouf Wellness Center



Hybrids

SF State Campaign Update

Mark Kelleher

Associate Vice President of Development
University Advancement



BOLD. Thinking.

The Campaign for **SAN FRANCISCO STATE**

Campaign Update
July 27, 2018



SF STATE

Campaign Objectives

- **Support student success – *ensure access to a high quality public university education; and help increase the graduation rate***
- **Recruit and retain high quality faculty**
- **Energize academic programs**
- **Renovate and replace aging facilities**



BOLD.Thinking. – a comprehensive campaign

- Different types of campaigns – capital (just buildings/facilities), program-specific (e.g., Athletics, Undergraduate Education, STEM, et al), comprehensive, etc.
- *Why is SF State pursuing a comprehensive campaign?*



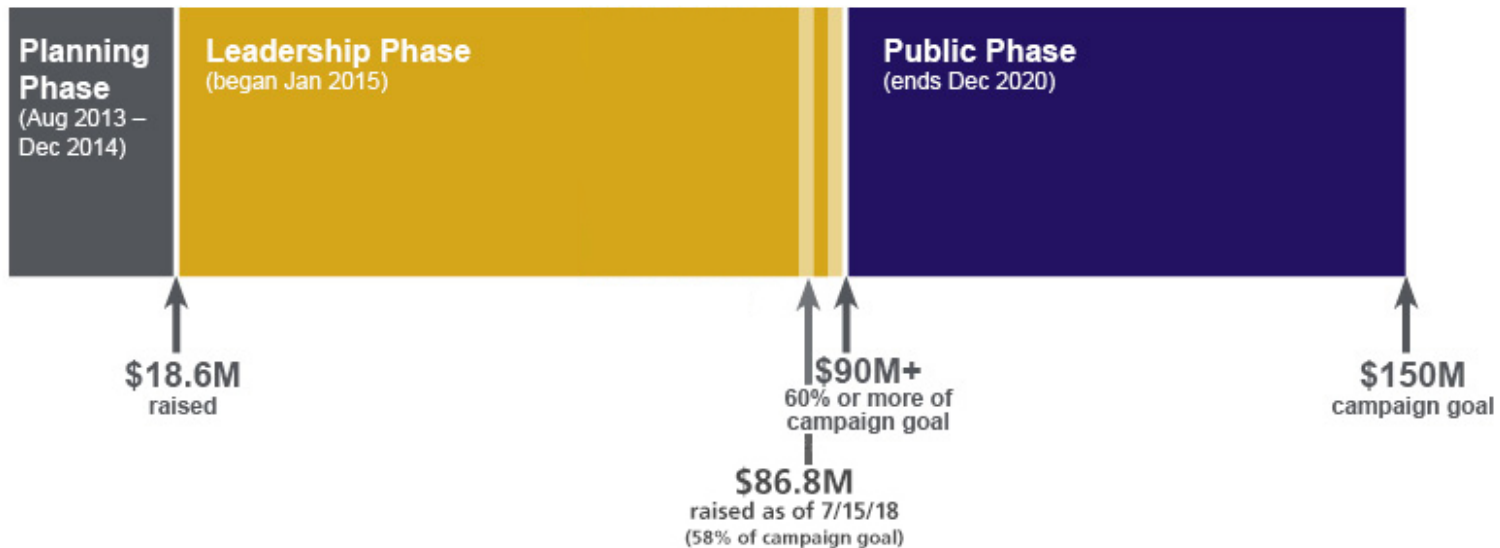
Benefits of a “comprehensive campaign”

Why focus on a comprehensive, campus-wide fundraising effort versus a project- or building-specific initiative?

- Deepen culture of philanthropy – beyond the Development Office – with university leaders, deans, faculty leaders and staff
- Provide more fundraising leads – *all* on campus *could* benefit from the campaign
- Establish a stronger, broader foundation for future fundraising success – including the next campaign!



Campaign Progress



Campaign Endowment Goal = \$100M / Raised to date: \$97M

Who is Supporting the Campaign?

(7/15/18)

By Donor Type

Individuals

Alumni/ae:	\$33,145,347
Faculty & Staff:	\$4,605,520
Friends:	\$12,981,251
Parents:	\$222,646
Students:	\$43,011
	\$50,997,775

Organizations

Corporations:	\$9,236,722
Foundations:	\$16,629,844
Other Groups:	\$10,016,930
	\$35,883,496

TOTAL TO DATE: \$86,881,271



Campaign Priorities: Planned v. Progress to Date

2014-15: 50 top campaign priorities determined by through an 18-month campus-wide planning process (percentage of \$150M goal):

- 50% academic program funding
- 25% new or renovated facilities/equipment
- 15% faculty support (including endowed chairs to recruit/retain faculty)
- 10% student support / scholarships and graduate fellowships

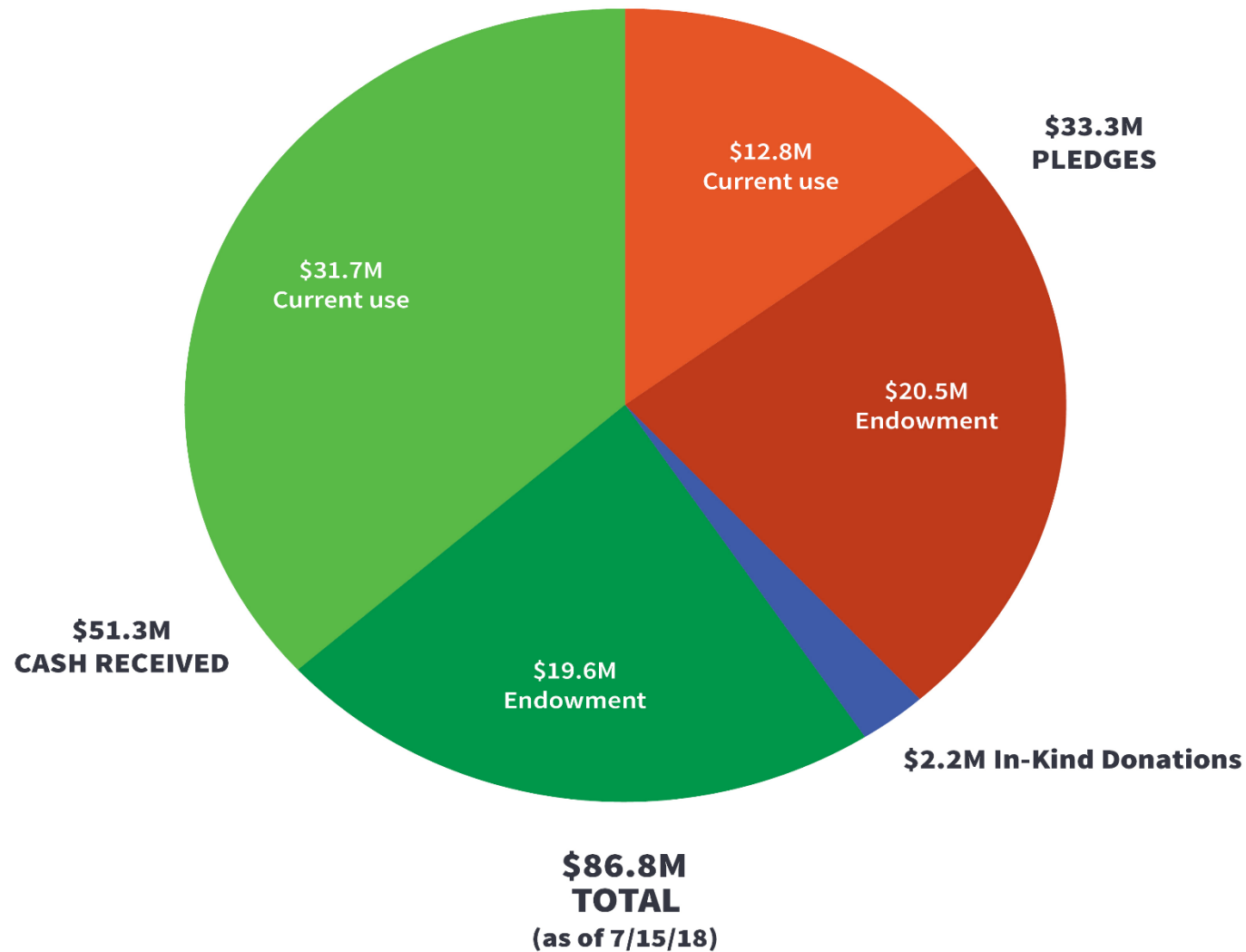
TODAY: Fundraising progress to date in each major priority category (percentage of funds raised to date):

- 39% academic program funding
- 3% new or renovated facilities/equipment
- 16% faculty support
- 42% student support / scholarships and graduate fellowships



Campaign Fundraising Breakdown – Total University-Wide

(7/15/18)



Campaign Fundraising Breakdown – By Major Unit

(7/15/18)

<u>Major Campaign Unit</u>	CASH		PLEDGE BALANCE		NON-CASH	<u>TOTAL</u>
	<u>Current Use</u>	<u>Endowment</u>	<u>Current Use</u>	<u>Endowment</u>	<u>Gifts In Kind</u>	
Business	\$3,253,242	\$716,696	\$1,081,131	\$162,800	\$323,882	\$5,537,752
Education	\$1,007,114	\$250,350	\$408,580	\$963,733	\$3,249	\$2,633,025
Ethnic Studies	\$486,298	\$62,025	\$39,896	\$12,001	\$8,647	\$608,868
Health and Social Sciences	\$5,207,714	\$2,097,322	\$1,542,440	\$1,298,700	\$22,840	\$10,169,015
Liberal and Creative Arts	\$3,796,690	\$10,110,277	\$613,428	\$6,230,157	\$129,305	\$20,879,856
Science and Engineering	\$5,105,800	\$2,679,747	\$1,477,468	\$3,868,553	\$595,422	\$13,726,990
Annual Fund	\$1,994,391	\$115,843	\$202,402			\$2,312,637
Athletics	\$2,298,654	\$25,100	\$1,195	\$40,000	\$22,616	\$2,387,565
Extended Learning	\$107,200					\$107,200
Graduate Division	\$6,025					\$6,025
International Programs	\$4,024	\$11,641				\$15,665
Library	\$320,820	\$1,170,150	\$5,000		\$638,737	\$2,134,706
SAEM	\$4,664,296	\$903,350	\$1,610,802	\$622,500	\$12,911	\$7,813,859
Undergraduate Education	\$1,108,269	\$115	\$1,595,225			\$2,703,609
University-wide*	\$2,328,851	\$1,455,280	\$4,225,245	\$7,350,131	\$484,992	\$15,844,499
TOTAL	\$31,689,388	\$19,597,896	\$12,802,812	\$20,548,575	\$2,242,600	\$86,881,271

**University-wide programs include Project Rebound, University Scholarship Fund, Unrestricted Endowment Funds (partial list)*



SF STATE

Public Phase Goals

- **Meet or exceed the campaign goal!**
- **Help meet the university's capital project obligations**
 - LCA Building (est. \$20M)
 - RTC/EOS facility upgrades (est. \$7M)
 - New Science Building (est. TBD)
- **Increase the number of endowed faculty chairs & professorships** – 9 secured to date; 4 solicitations submitted, 4 additional exploratory conversations with donors underway
- **Expand support for the university beyond our traditional base**
 - primarily through new leads from closest donors & volunteers, and media attention



Public Phase Goals (cont'd)

- **Launch & complete a successful faculty/staff campaign**
 - **next steps:**
 - Secure approval of plan from provost & president
 - Set goal at \$6M or \$8M? (TBD; current f/s donations total \$4.6M)
 - Promote through campus news/payroll deduction, events, constituent meetings, brochures/envelopes and other print and online publications
 - Select and support co-chairs in each college/major division, and their departmental campaign captains
 - Celebrate and promote milestones/successes
- **Raise SF State's public profile** – primarily through enhanced campaign branding, marketing and media outreach

...beginning with the Public Phase Campaign Kickoff Event!



Combined Campaign Cabinet & Development Committee:

Chair: John Gumas – alumnus, SF State
Foundation Board chair emeritus

Members – Campaign Cabinet:

Sheldon Axler, faculty

Trevor Getz, faculty

Yim-Yu Wong, faculty

Darlene Yee-Melichar, faculty

Neda Nobari, alumna

David Simon, alumnus

vacant, alum

*Members – SF State Foundation Board
Development Committee:*

Dana Corvin, alumna

Nancy Fudem, friend

Judy Marcus, alumna

Neda Nobari, alumna

Marsha Rosenbaum, alumna

Camilla Smith, friend



Campaign Pipeline Projections:

Fundraising Path To the Public Phase Kickoff!

- | | | |
|---|--|---------------------|
| ➤ | Ideal Fundraising Goal by the 2019 Campaign Kickoff : | \$90,000,000 |
| | (60% of \$150M goal) | |
| ➤ | Raised to Date (as of 7/15/18): | \$86,881,271 |

\$3.1M to Go!

- **Submitted proposals:** **\$70,388,046**
- **Planned proposals (active solicitations):** **\$52,129,532**

Total solicitations underway (as of 7/15/18): **\$122,517,578**

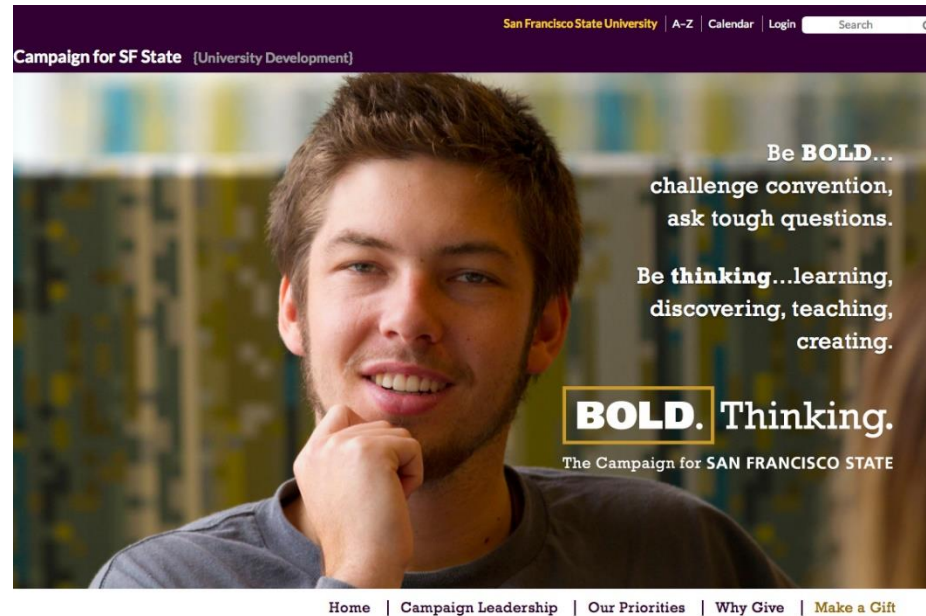


Current Solicitation Pipeline & Gifts/Grants to Date (7/15/18)

	Current Solicitation Pipeline		Gifts/Grants to Date	
<u>Ask Level</u> <u>(solicitation target)</u>	<u># of Solicitations</u>	<u>Value of Solicitations</u>	<u># of Donors</u>	<u>Value of Gifts</u>
\$25,000,000+	2	\$50,000,000	0	\$0
\$10,000,000	1	\$10,000,000	0	\$0
\$5,000,000	5	\$25,000,000	3	\$15,074,591
\$1,000,000	14	\$19,516,000	20	\$30,299,529
\$500,000	10	\$5,760,000	10	\$6,352,519
\$250,000	21	\$5,573,000	31	\$10,387,057
\$100,000	23	\$2,528,600	63	\$9,121,376
\$50,000	35	\$1,985,000	63	\$4,132,344
\$25,000	65	\$1,760,000	112	\$3,723,463
\$10,000	19	\$265,000	170	\$2,407,444
<\$10,000	81	\$129,978	16324	\$5,382,948
Total		\$122,517,578	16796	\$86,881,271



Campaign Website & Video:



The Campaign for San Francisco State

Bold. Thinking. is the first comprehensive fundraising campaign in the history of San Francisco State University.

<http://develop.sfsu.edu/campaign>

Questions?





OPEN FORUM

Ten Minutes
(Three Minutes Per Speaker)

Next Meeting:

Fall 2018 - Date TBA

Thank you for attending.

