



**SAN FRANCISCO
STATE UNIVERSITY**



University Budget Committee

Thursday, November 19, 2020

Welcome from UBC co-chairs

Jeff Wilson

Interim Vice President & CFO
Administration & Finance

Jennifer Summit

Provost and Vice President
Academic Affairs

Today's Agenda:

OPENING

- | | |
|----------------------------------------------|---------------------------|
| 1. Welcome | Co-Chairs Wilson & Summit |
| 2. Approval of minutes from October 22, 2020 | VP Wilson |
| 3. Opening remarks from President Mahoney | President Mahoney |
| 4. Human Resources update | AVP Ingrid Williams |

BUDGET TRANSPARENCY

- | | |
|----------------------------------|--------------|
| 5. Navigating the Budget website | Elena Stoian |
|----------------------------------|--------------|

PRESENTATIONS

- | | |
|------------------------------------------|----------------------------------------|
| 6. Program Enrollment Trends | Provost Summit, Dean Way, Dean Clavier |
| 7. Housing, Dining & Conference Services | Jeny Patino |

UPDATES AND INFORMATIONAL ITEMS

- | | |
|--------------------------------------------------------------------|----------------|
| 8. UBC Steering Committee report | Provost Summit |
| 9. UBC Policy Workgroup report (<i>moved to Dec.</i>) | VP Wilson |

ACTION ITEMS FOR THE COMMITTEE

- | | |
|------------------------------------------------------------------|---------------|
| 10. 2021-2022 Budget Timeline and Process and recommendations | VP Wilson |
| 11. UBC RSO Workgroup report and recommendations (first reading) | Genie Stowers |

PUBLIC FORUM (15 minutes; three-minute limit per speaker)

ADJOURNMENT (next meeting, Thursday, December 17, 10:00 AM –12:00 PM)

Approval of October 22nd Meeting Minutes

Opening Remarks

President Lynn Mahoney

Human Resources Update

Ingrid C. Williams
Associate Vice President
Human Resources

Budget Transparency topic:

Navigating the Budget Website

Elena Stoian

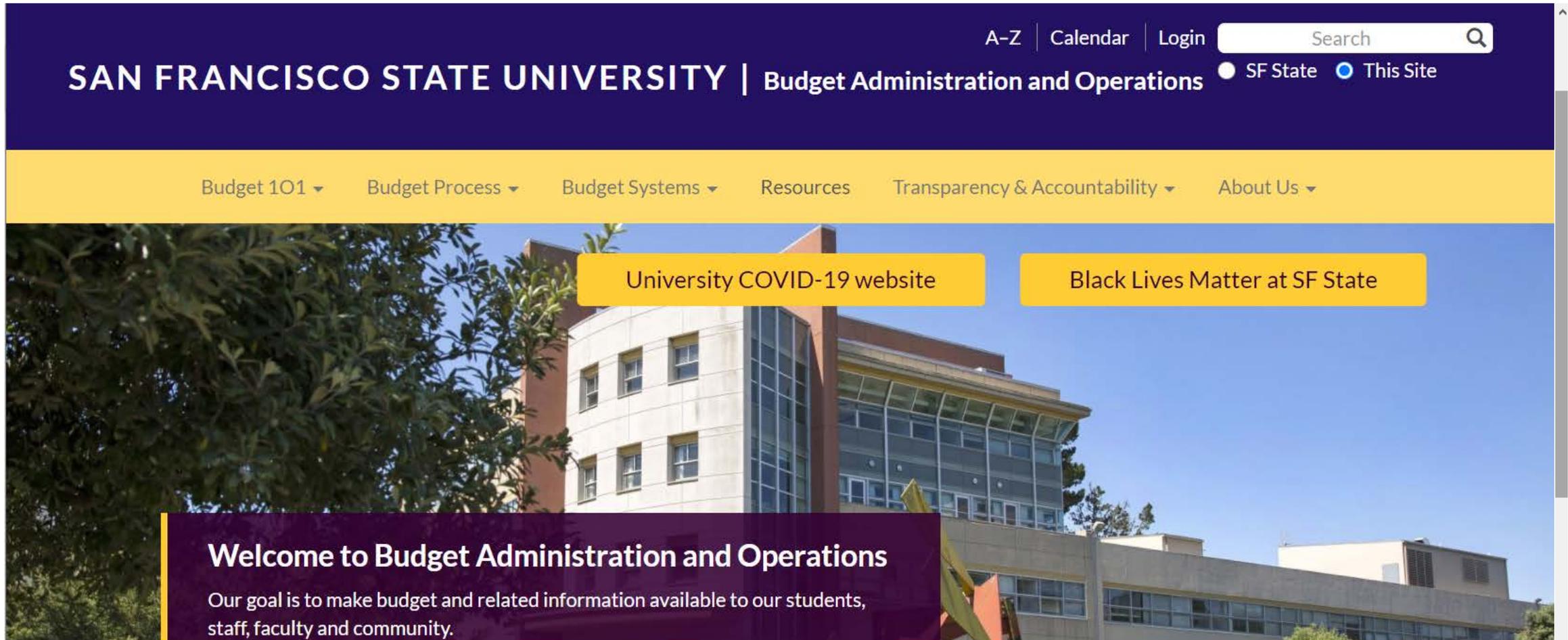
Executive Director

Budget Administration & Operations

Administration & Finance

NEW BUDGET WEBSITE

NEW LOOK: EASIER ACCESS TO INFORMATION budget.sfsu.edu



BUDGET UPDATES AT YOUR FINGERTIPS budget.sfsu.edu

Recent Budget Developments and Our Upcoming Projects & Events

RECENT BUDGET DEVELOPMENTS

News

A message from University President Mahoney regarding the July Budget Update

(read more)

...

A letter from the CSU System Chancellor to the Faculty and Staff regarding layoffs and furloughs

(read more)

...

CSU Chancellor's Office announces Fiscal Year 2020-21 Final Budget Allocations (a.k.a. "The B-Memo")

(read more)

...

SPOTLIGHT

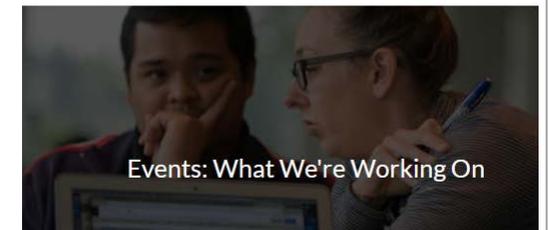


Supporting the University

We are committed to supporting the mission of the University community by creating and disseminating quality information for planning, budgeting, management, and



Budget Timeline: This Year's Budget Development



Events: What We're Working On

A GUIDE TO UNDERSTANDING THE SF STATE BUDGETING PROCESSES

A glossary of budget concepts, schedules, and cycles

The screenshot shows the top navigation bar with links: Budget 101, Budget Process, Budget Systems, Resources, Transparency & Accountability, and About Us. A dropdown menu is open under Budget 101, listing: Budget Basics, Basic Definitions, Budget Cycles, and Additional Resources. Below the navigation is a banner image of a calculator and documents. The main heading is "Budget 101: Budget Basics". Below this is a paragraph: "The Budget 101 guides are intended to give an understanding of the San Francisco State University Budgeting System. Navigate the links to our guides below to learn more about San Francisco State's Budget." A link "complete guide in PDF format" is provided. At the bottom, there are four large buttons: "Budget Basics", "Basic Definitions", "Budget Cycles", and "Additional Resources".

Budget Basics

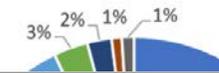
Let's start with a basic question: What is the University Budget? The Budget is the plan for where revenues adequate to run the University are forecast to come from and for how those funds should be allocated each year.

Where does our money come from? +

How is our money spent? -

University Expenditures

SF State's operating expenses can be grouped into several major categories:



SF State Budget Process

Full Budget Process -

Combined California, CSU and University budget timelines



DETAILED INSTRUCTIONS FOR PLANNING, OPERATIONS & REVIEW

- Operating & Capital Budget processes
- Cost Recovery
- Labor Cost Distribution
- Financial Oversight

Financial Oversight

CSU policy -- and sound business practices -- require the campus to perform timely, financial reviews to inform campus decision-makers of conditions affecting our campus budget and financial performance. Each Fiscal Year we will conduct periodic financial reviews, typically in Fall, Winter and Spring.

The expectation is to provide reasonably realistic and practical projected expenditures/revenues for the remainder of the fiscal year. Any significant changes to the budget plan should be highlighted in the Certification of Financial Actions with detailed documentation to support the changes.

BAO is always available to meet with your staff to discuss the Financial Review report process. If you have any questions, please schedule an in-person or over-the-phone appointment with any of the budget analysts. Visit our [Who We Are page](#) for our contact information of Our Team.

Fiscal Year 2020-21

Financial Review Instructions

[Financial Review Oversight Policy and Instructions in PDF format \(open file in new window\)](#) 1.69 MB

Budget Process: Operating Budget

Navigate the links to the Budget Process pages below to become familiar with the various aspects of campus budgeting at SF State.

Budget Timeline

Operating Budget

Capital Budget

Financial Oversight

Labor Cost Distribution

Cost Recovery

Campus Reserve

Other Funds

Operating Budget

Fiscal Year 2020-21

Operating Budget Planning Documents

[Budget Planning Assumptions in PDF format \(open file in new window\)](#) 268.58 KB

Capital Budget

Fiscal Year 2020-21

Capital Budget Planning Documents

[Fiscal Year 2020-21 - SF State Capital Budget Manual in PDF format \(open file in new window\)](#) 347.99 KB

[Fiscal Year 2020-21 - Capital Budget Timeline in PDF format \(open file in new window\)](#) 240.03 KB

[Capital Budget Planning Schedule in PDF format \(open file in new window\)](#)

time frames for developing the capital budget

MONTH	TASK	DATE	RESPONSIBILITY	DELIVERABLES
February	Call letter to the departments and schools for project proposals for next fiscal year's Capital Budget	Beginning of February	Capital Planning, Design and Construction (CPDC)	Call letter for the SF State Capital Budget
February - March	Prioritize requests and identify funding sources in the project request submission	End of March or the beginning of April	Departments and schools	Project request submission to CPDC
April - May	Receive and consolidate the submission	End of May	CPDC	Consolidated project requests
June	Review and prioritize the consolidated submission	End of June	CPDC	Draft Capital Budget submission to BAO

PLANNING BUDGETARY CLOUD SOLUTION: SYSTEM ACCESS, GUIDES & TRAINING

- Budget Planning (BP)
- Current Year Planning (CYP)
- Multi Year Planning (MYP)
- Strategic Planning
- Ad-hoc Analytics (Smart View)
- Financial Data Warehouse (FDW)

SF_PBCS Overview

SF_PBCS, SF State's financial planning and analysis tool, supports our efforts to align resources to strategy. Navigate the links to the SF_PBCS pages below to become familiar with the various features of the budgeting system at SF State.

SF_PBCS Overview

User Training

User Guide

User Login

FAQ

User Login

Production Environment

To submit budget plans, click the button below to be taken to Oracle's Enterprise Planning Budgeting Cloud Service **PRODUCTION** environment (green background) login page. Once there, click on the Company Sign In button to the right to access SF_PBCS through the SF State Global Login.

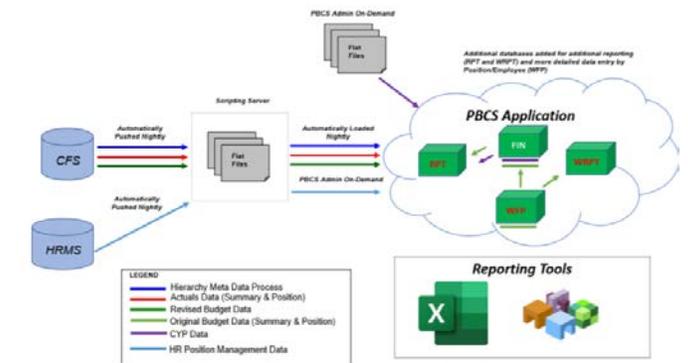
SF_PBCS Production Environment

Test Environment

To test budget scenarios and explore the system, click the button below to be taken to Oracle's Enterprise Planning Budgeting Cloud Service **TEST** environment (gray background) login page. Once there, click on the Company Sign In button to the right to access SF_PBCS through the SF State Global Login.

SF_PBCS Test Environment

DATA PROCESS FLOW



OUR COMMITMENTS TO EFFICIENCY AND ACCOUNTABILITY

- SF State Budget Reports

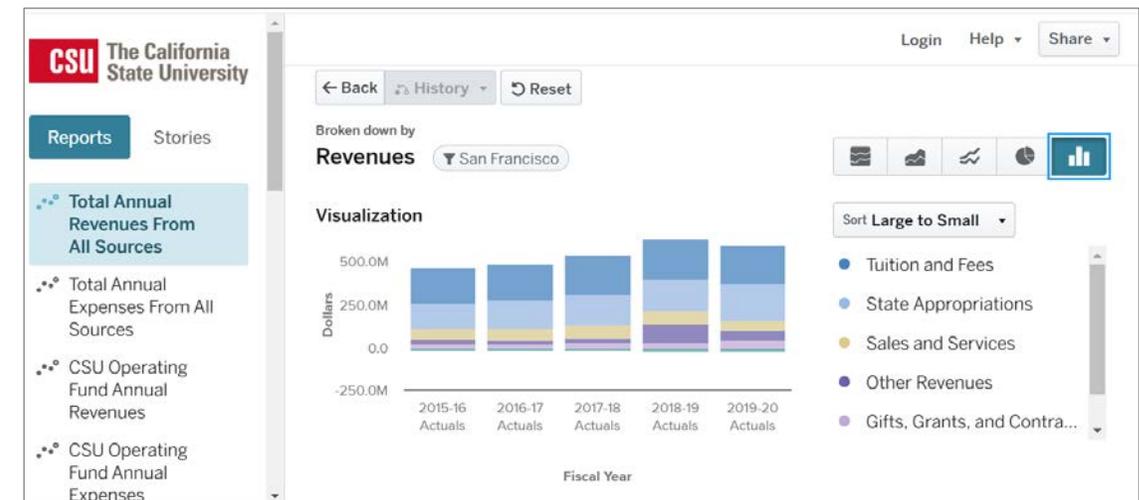
Annual Budget Reports
Current and past University Budget Reports (formerly known as Budget Books) by fiscal year (FY).
If you are looking for budget reports from fiscal years 2011-2012 through 2014-2015, please contact us at budget@sfsu.edu. We will endeavor to provide documents and data in a timely and accessible manner.
If you are looking for budget reports for fiscal years prior to fiscal year 2011-2012, please contact the [University Archives](#). You are welcome to submit questions or requests via email to specialcollections@sfsu.edu. Please allow up to five days to respond to your email.

FY 2020-2021 +

FY 2019-2020 -

- [Fiscal Year 2019-2020 Budget Report Executive Summary in PDF format \(open file in new window\)](#) 2.24 MB
- [Fiscal Year 2019-2020 Budget Report in PDF format \(open file in new window\)](#) 4.2 MB
- [Fiscal Year 2019-2020 Capital Plan & Capital Budget in PDF format \(open file in new window\)](#) 2.05 MB

- In partnership with OpenGov, CSU provides insight into its finances by year, campus and fund for total revenues and expenses from all sources.



Program Enrollment Trends

Jennifer Summit

Provost and Vice President
Academic Affairs

Lori Beth Way

Dean, Undergraduate Education and Academic Planning

Sophie Clavier

Dean, Graduate Studies

Sutee Sujitparapitaya

Associate Provost, Institutional Analytics

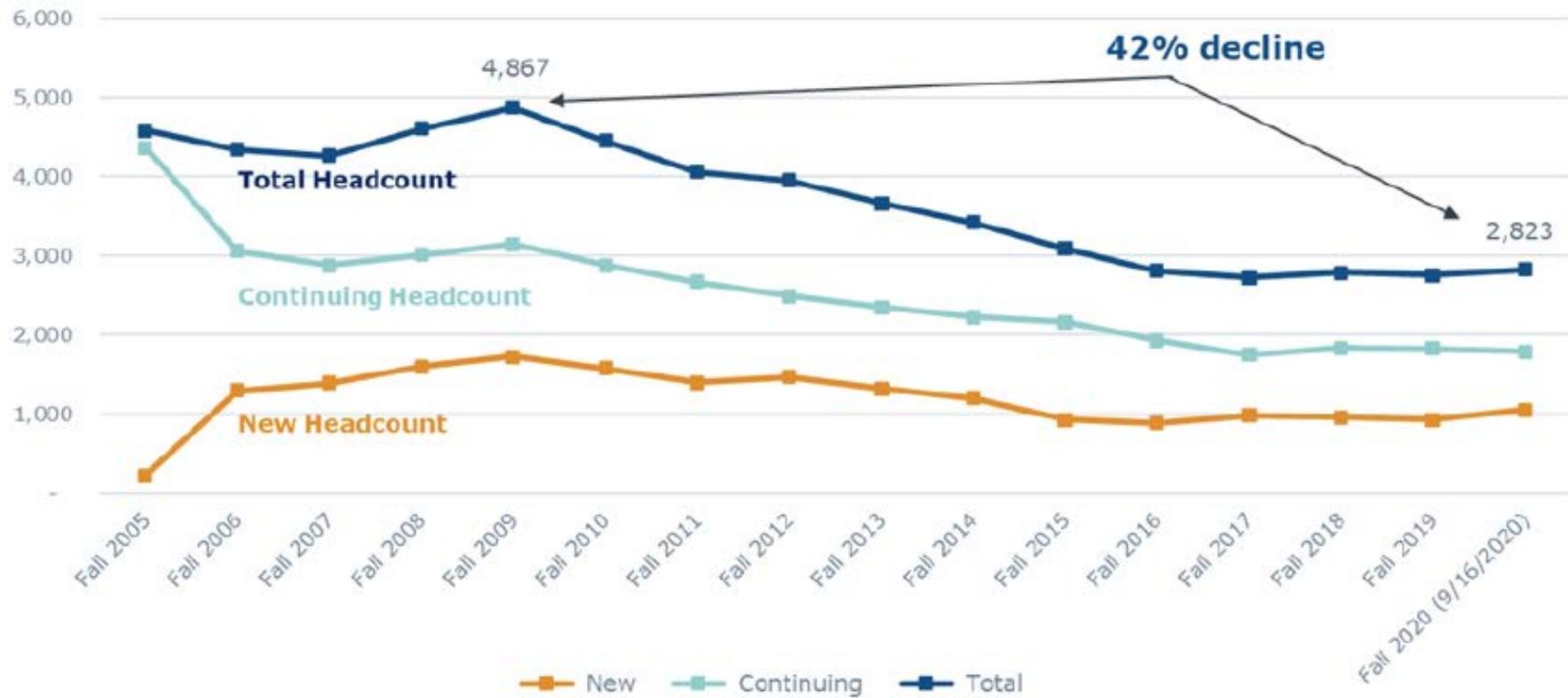


Undergraduate Student Headcount 2005-2020





Graduate Student Headcount 2005-2020



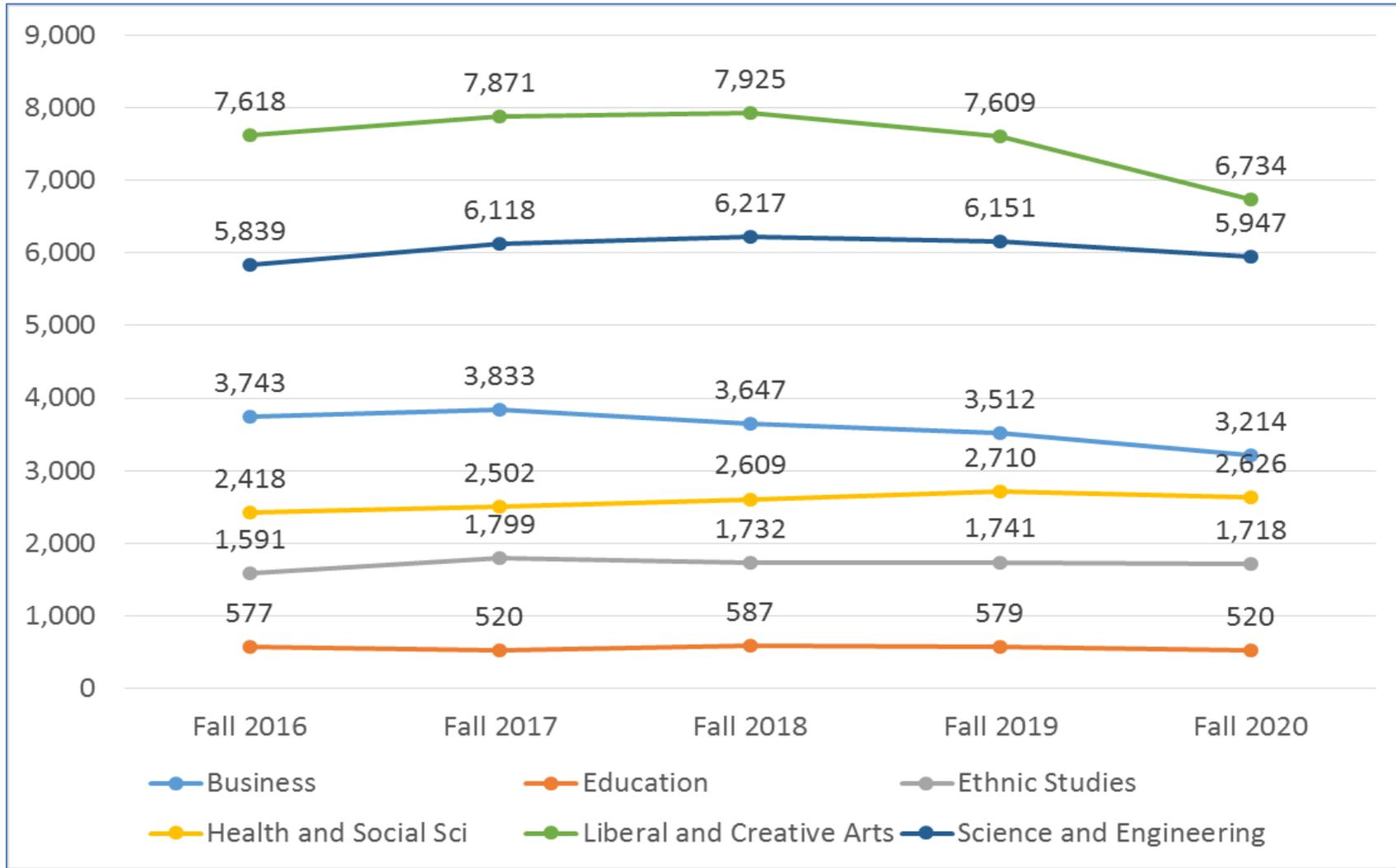


Undergraduate Enrollment

Lori Beth Way, Dean of Undergraduate Education and Academic Planning

University Budget Committee, November 19th, 2020

Course Enrollment (based on FTES)

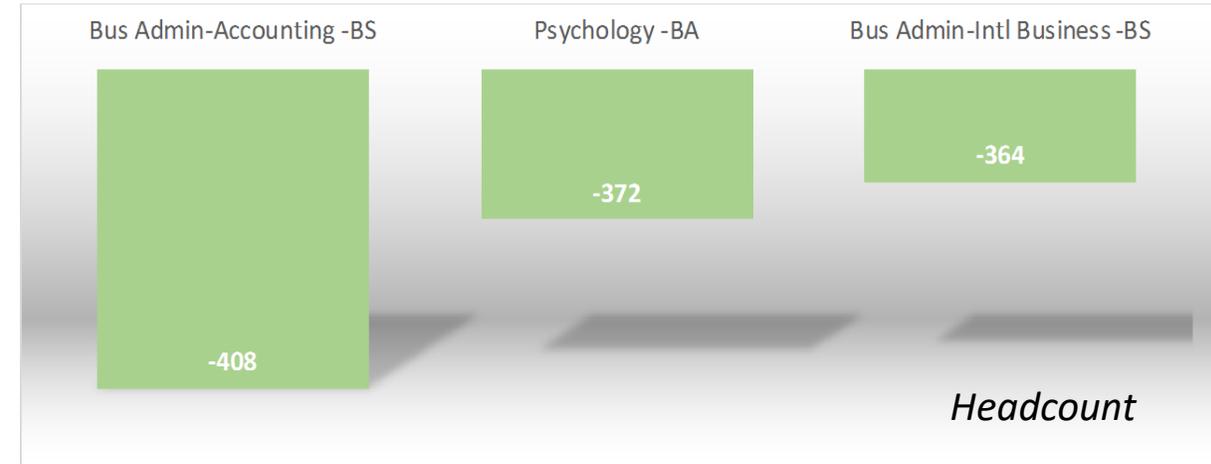


Source: SFSU Course Enrollment at Census (<https://ir.sfsu.edu/content/course-faculty-data>)

Top Major Enrollment Trends Over the Past 10 Years

Three Greatest Gains

Three Greatest Declines



Program	Fall 2020	10 Year Period	
		Trend	Change
Computer Sci -BS	1,476		+ 1,213
CAD-Early Childhood -BA	420		+ 396
Criminal Justice Studies -BA	882		+ 341

Program	Fall 2020	10 Year Period	
		Trend	Change
Bus Admin-Accounting -BS	678		-408
Psychology -BA	1055		-372
Bus Admin-Intl Business -BS	278		-364

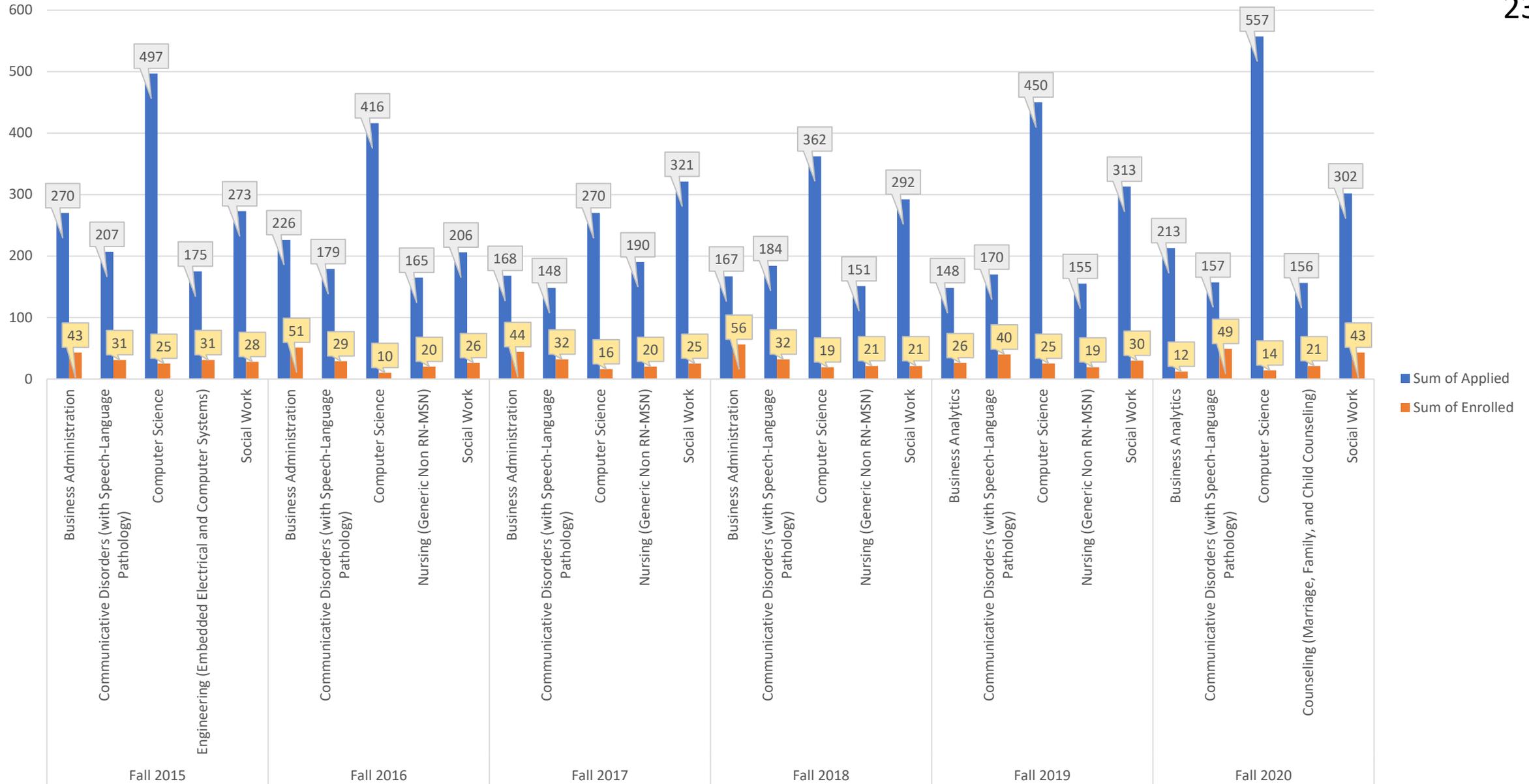


Graduate Enrollment

Sophie Clavier, Dean of Graduate Studies

University Budget Committee, November 19th, 2020

Application Submissions Top 5 Graduate Programs Fall 2015 to Fall 2020 & New Student Enrollment at Census



	Applied	Enrolled	% Enrolled
Fall 2015	1422	158	11%
Business Administration	270	43	16%
Communicative Disorders (with Speech-Language Pathology)	207	31	15%
Computer Science	497	25	5%
Engineering (Embedded Electrical and Computer Systems)	175	31	18%
Social Work	273	28	10%
Fall 2016	1192	136	11%
Business Administration	226	51	23%
Communicative Disorders (with Speech-Language Pathology)	179	29	16%
Computer Science	416	10	2%
Nursing (Generic Non RN-MSN)	165	20	12%
Social Work	206	26	13%
Fall 2017	1097	137	12%
Business Administration	168	44	26%
Communicative Disorders (with Speech-Language Pathology)	148	32	22%
Computer Science	270	16	6%
Nursing (Generic Non RN-MSN)	190	20	11%
Social Work	321	25	8%
Fall 2018	1156	149	13%
Business Administration	167	56	34%
Communicative Disorders (with Speech-Language Pathology)	184	32	17%
Computer Science	362	19	5%
Nursing (Generic Non RN-MSN)	151	21	14%
Social Work	292	21	7%
Fall 2019	1236	140	11%
Business Analytics	148	26	18%
Communicative Disorders (with Speech-Language Pathology)	170	40	24%
Computer Science	450	25	6%
Nursing (Generic Non RN-MSN)	155	19	12%
Social Work	313	30	10%
Fall 2020	1385	139	10%
Business Analytics	213	12	6%
Communicative Disorders (with Speech-Language Pathology)	157	49	31%
Computer Science	557	14	3%
Counseling (Marriage, Family, and Child Counseling)	156	21	13%
Social Work	302	43	14%

Application Submissions
Top 5 Graduate Programs Fall 2015 to Fall 2020
&
New Student Enrollment at Census

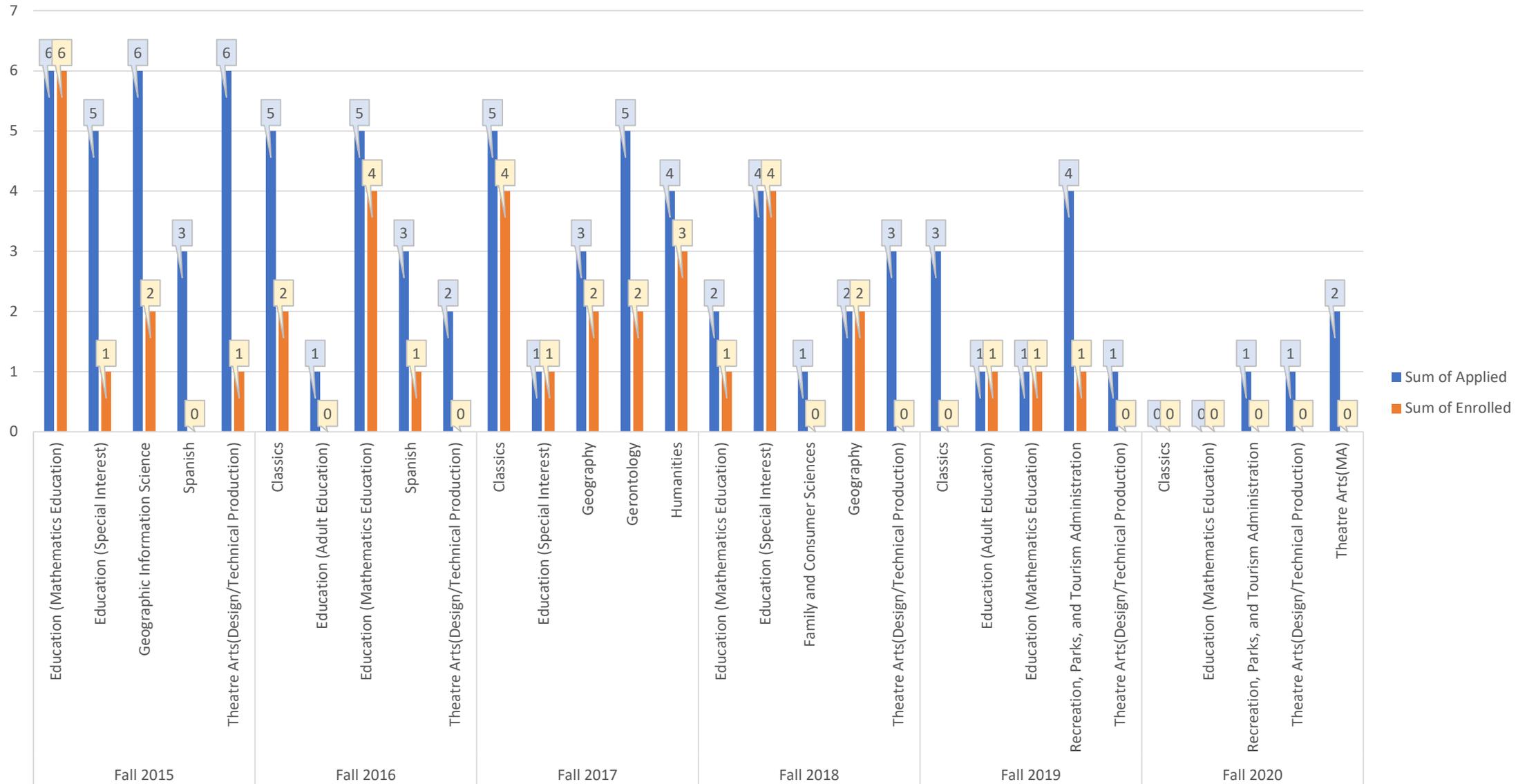
Source: SFSU Student Enrollment at Census
(<https://ir.sfsu.edu/content/students-data>)

New Student Enrolled @ Census

Fall 2015	182
Business Administration	43
Communicative Disorders (with Speech-Language Pathology)	31
Creative Writing	42
Engineering (Embedded Electrical and Computer Systems)	31
Special Education	35
Fall 2016	177
Accountancy	28
Business Administration	51
Communicative Disorders (with Speech-Language Pathology)	29
Education (Educational Administration)	26
Special Education	43
Fall 2017	203
Biology (Cell and Molecular Biology)	35
Business Administration	44
Communicative Disorders (with Speech-Language Pathology)	32
Public Administration	33
Special Education	59
Fall 2018	208
Business Administration	56
Communicative Disorders (with Speech-Language Pathology)	32
Counseling	31
Creative Writing	32
Special Education	57
Fall 2019	185
Communicative Disorders (with Speech-Language Pathology)	40
Creative Writing	30
Public Administration	34
Social Work	30
Special Education (Credential & MA)	51
Fall 2020	228
Business Administration	38
Communicative Disorders (with Speech-Language Pathology)	49
Counseling	32
Social Work	43
Special Education (Credential & MA)	66

Top 5 Graduate Program Enrollment
Fall 2015 to Fall 2020
New Student Enrollment at Census

Application Submissions to Bottom 5 Graduate Programs Fall 2015 to Fall 2022 & New Student Enrollment @ Census

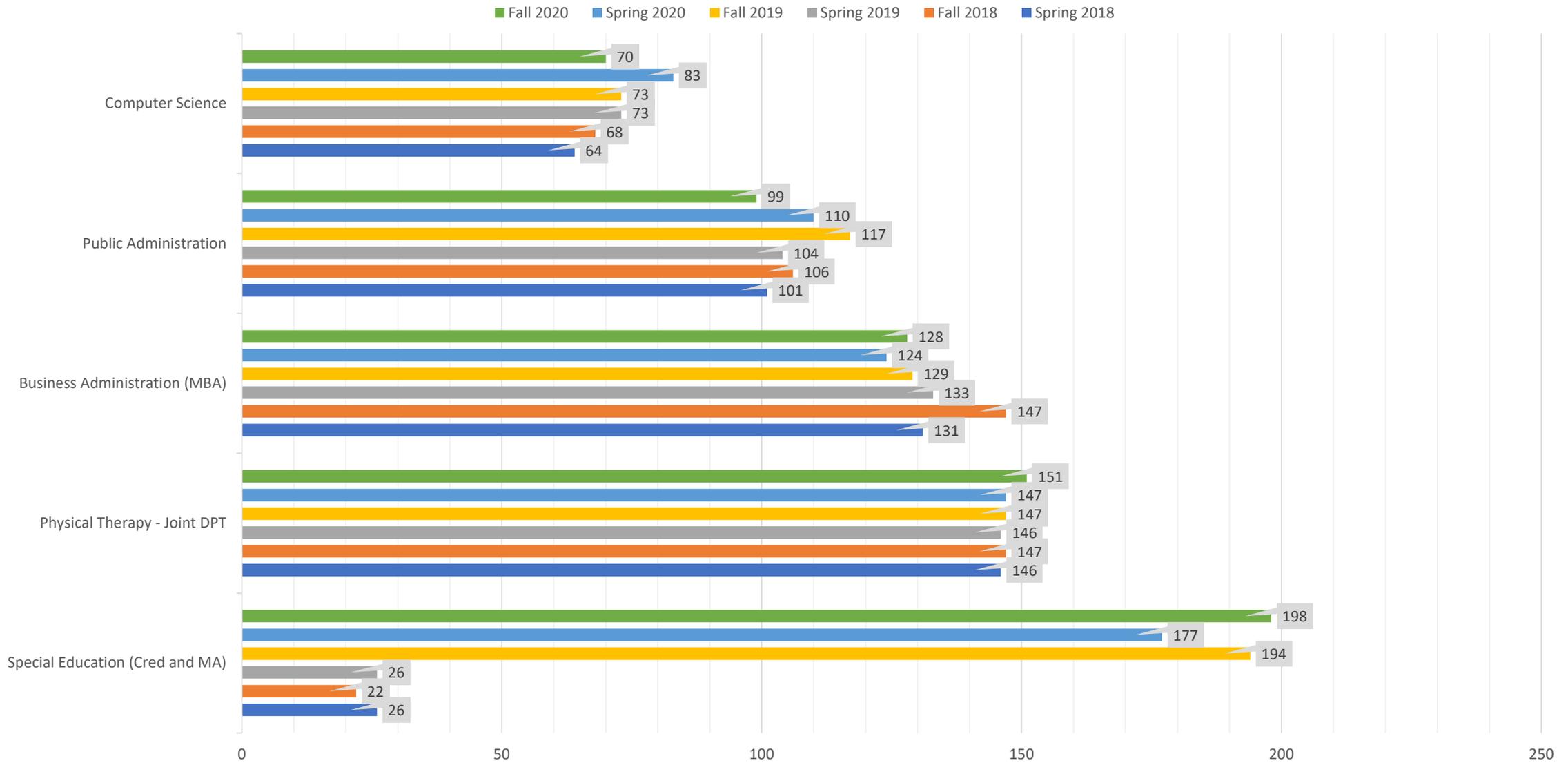


	Applied	Enrolled
Fall 2015	26	10
Education (Mathematics Education)	6	6
Education (Special Interest)	5	1
Geographic Information Science	6	2
Spanish	3	0
Theatre Arts(Design/Technical Production)	6	1
Fall 2016	16	7
Classics	5	2
Education (Adult Education)	1	0
Education (Mathematics Education)	5	4
Spanish	3	1
Theatre Arts(Design/Technical Production)	2	0
Fall 2017	18	12
Classics	5	4
Education (Special Interest)	1	1
Geography	3	2
Gerontology	5	2
Humanities	4	3
Fall 2018	12	7
Education (Mathematics Education)	2	1
Education (Special Interest)	4	4
Family and Consumer Sciences	1	0
Geography	2	2
Theatre Arts(Design/Technical Production)	3	0
Fall 2019	10	3
Classics	3	0
Education (Adult Education)	1	1
Education (Mathematics Education)	1	1
Recreation, Parks, and Tourism Administration	4	1
Theatre Arts(Design/Technical Production)	1	0
Fall 2020	4	0
Classics	0	0
Education (Mathematics Education)	0	0
Recreation, Parks, and Tourism Administration	1	0
Theatre Arts(Design/Technical Production)	1	0
Theatre Arts(MA)	2	0

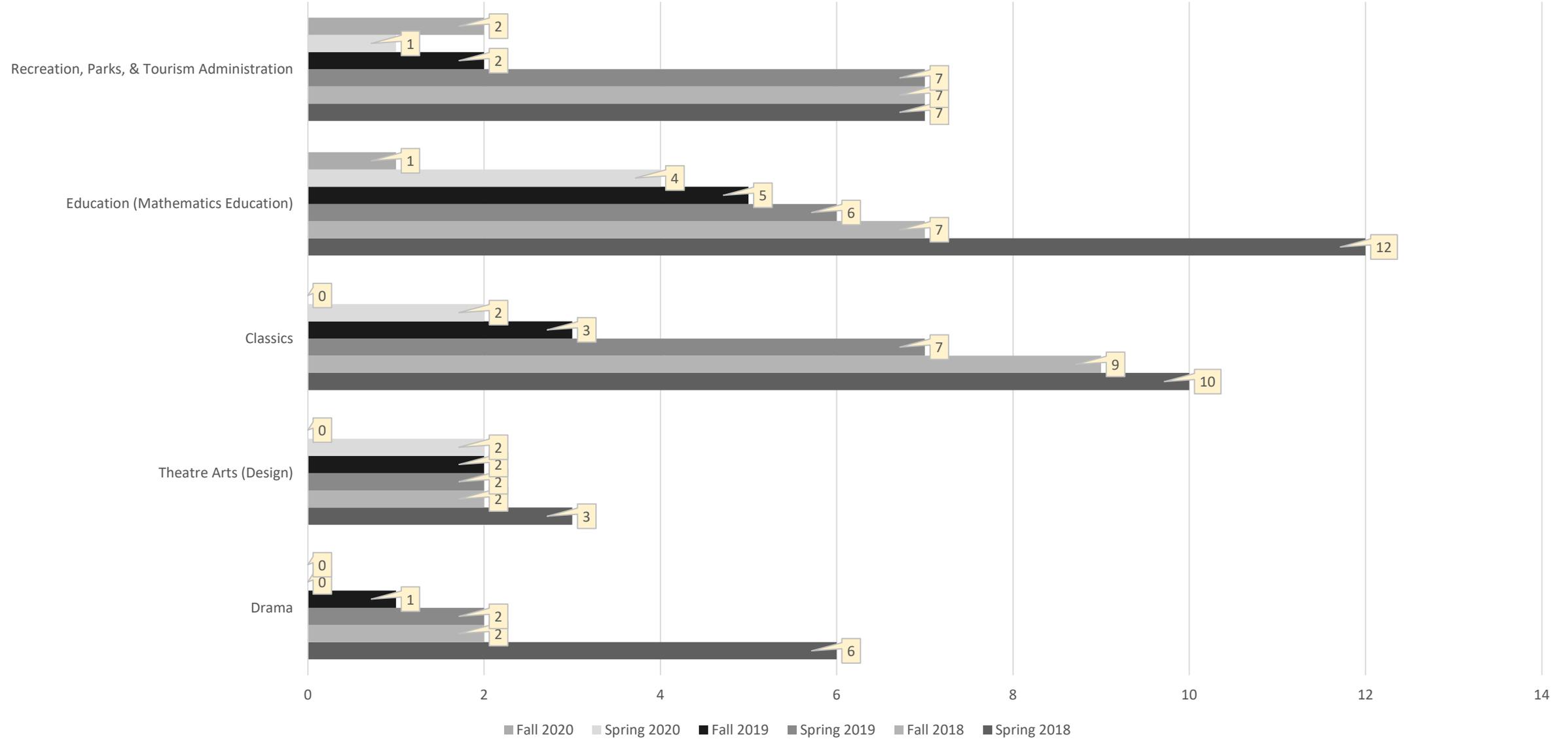
Application Submissions to Bottom 5 Graduate Programs

Fall 2015 to Fall 2020
&
New Student Enrollment @ Census

Top 5 Enrolled Graduate Programs Over Six Semesters | New & Continuing Students



Bottom 5 Enrolled Graduate Programs Over Six Semesters | New & Continuing Students



Source: SFSU Student Enrollment at Census (<https://ir.sfsu.edu/content/students-data>)



<https://ir.sfsu.edu>

Student Data

Student (Major) Enrollment Reports

View our Student (Major) Enrollment Dashboard here!

Includes official headcount/FTEs from Fall 2004 thru present.

A screenshot of the Institutional Research website's Student (Major) Enrollment Reports dashboard. The page has a purple header with the San Francisco State University logo and contact information. Below the header is a navigation bar with tabs for Term, Year, College, Department, Major, HeadCount, Percentage, and FTES. The Term tab is selected, showing a list of years from 2004 to 2008. The Year 2007 is selected. Below the navigation bar are several dropdown menus for filtering data by College, Department, Major, and Student Level. There are also buttons for 'Go' and 'Reset'.

San Francisco State University
University Total
Enrollment Headcount Report

Student Level	Fall 2015		Fall 2016		Fall 2017		Fall 2018	
	Student Count	Student %						
a Undergrad	25,415	88.5%	25,991	89.1%	26,161	89.7%	26,436	89.4%
w 2nd/Post Bac	369	1.2%	348	1.2%	324	1.1%	367	1.2%
g Graduates	3,062	10.2%	2,806	9.7%	2,722	9.2%	2,783	9.4%
Total	30,258	100.0%	29,045	100.0%	29,607	100.0%	29,586	100.0%

Contact: institutionalresearch@sfsu.edu
Note: The information above is official census and may differ from the data reported to the federal and state agencies due to differences in guidelines, definitions, and dates.

Course Data

Course Enrollment

- [Historical Course Enrollment \(Official Census\)](#)
- [Daily Course Enrollment \(Unofficial\): Fall 2020](#)

-
- [Individual Course Enrollment by Department](#)
 - [Course Enrollment Summary by College](#)
 - [Course Enrollment Summary by Department](#)

Housing, Dining & Conference Services

Jeny Patino

Executive Director

Housing, Dining & Conference Services

Administration & Finance

Housing – Overview

University Housing, Dining & Conference Services (HDCCS) operates three revenue generating programs with annual revenues of **\$63.5 million**:

- Student Housing and Dining;
- Employee & Family Housing;
- Conference & Events Services.

These housing programs support:

- **4,100** student residents;
- **380** apartments of family housing;
- Summer conferences for internal and external clients;
- Marketing and leasing of underutilized campus spaces.

Student housing occupancy has decreased from 96% of **4,100** beds in FY2019-20 to 9% or **400** beds occupied in FY 2020-21.

Housing - Financial Obligations

Operating Expenses

- In addition to housing administration costs, HDCS funds support services: Residential Life, Facilities Services, ITS, Environmental Health & Safety, and Capital Planning, Design & Construction;
- Utilities – cost of utilities will not decrease proportionally to student occupancy due to buildings maintenance to prevent legionella, COVID-19 and other diseases;
- Health and safety – projected expenditures increase in connection with on-going maintenance and resident support;
- Annual deferred maintenance allocations – FY 2020-21 identified need is **\$8.7 million**. These allocations have been postponed;
- Fixed expenses-food services, internet and data services, contractual obligations. Every effort is being made to renegotiate agreements and mitigate costs.

Housing - Financial Obligations

Debt Service

- Debt service is bond financed “mortgage” through the State of California, it can not be deferred, postponed or delinquent;
- Housing currently has **\$236.4 million** in outstanding debt plus interest obligations through 2039; FY 2020-21 debt service and system obligation is **\$16.4 million**;
- CSU system requires housing to maintain a debt to income ratio (DSCR) of minimally **1.1** in order to maintain a favorable credit rating and interest rate. Anticipated DSCR for 2020-21: **- 0.36**.

Reserves

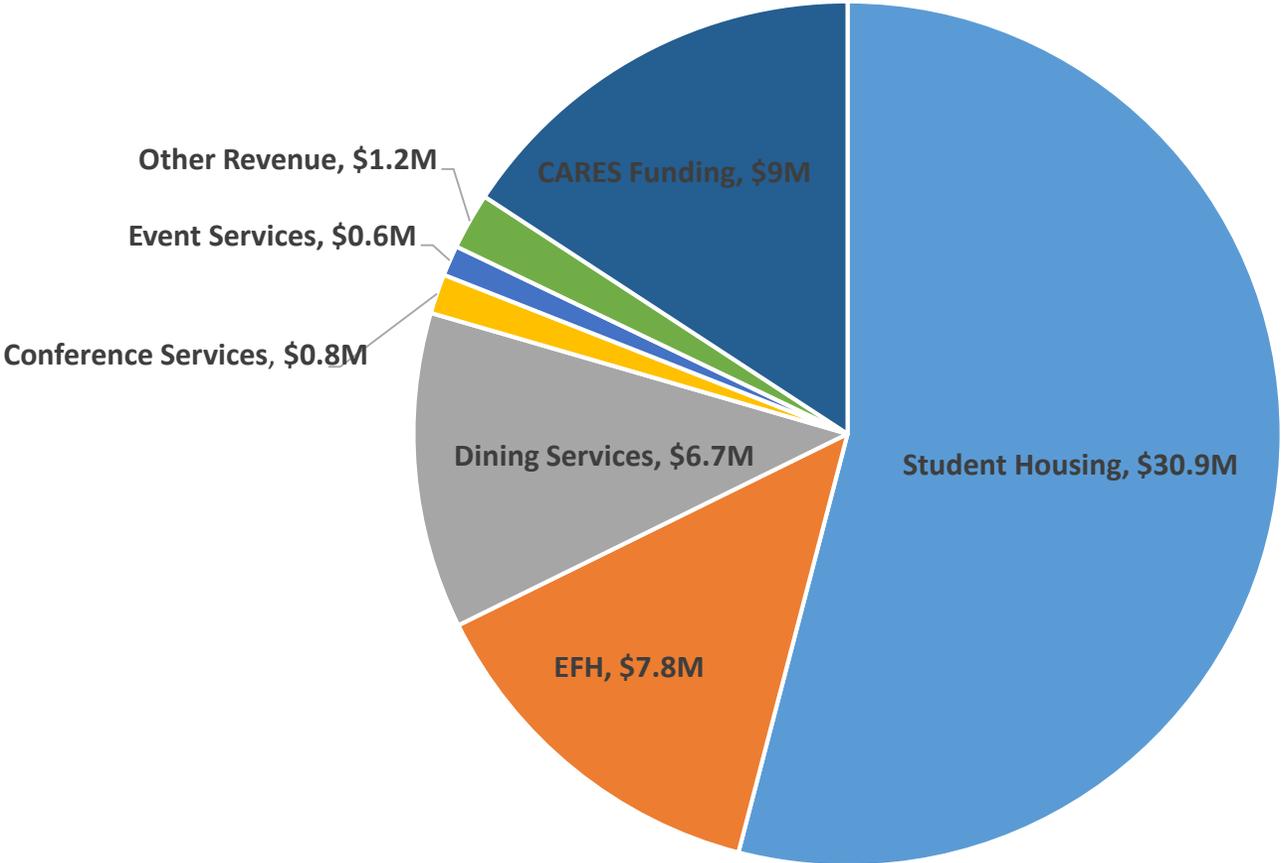
- CSU reserve policy establishes that housing must maintain a minimum of 3 months to a maximum of 6 months of the operating budget.

Housing Forecast – Operations (\$ in millions)

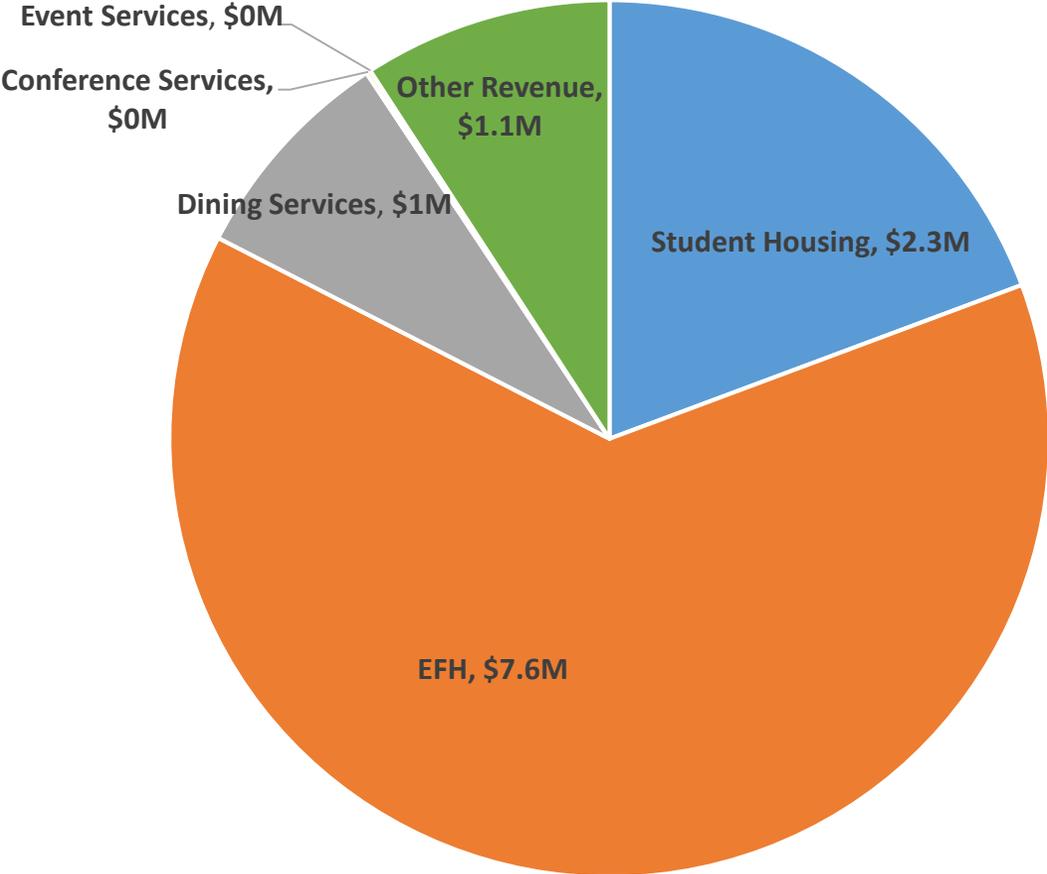
	Full Operations	FY 2019-20 Actuals	FY 2020-21 Forecast	% Change
Beginning fund balance		31.5	22.8	
Revenues	63.5	48.1	12.0	-75.1%
Cares Act funding	0.0	9.0	0.0	-100.0%
Salaries and benefits	4.7	3.7	2.6	-29.7%
Operating expenses	13.0	12.9	10.8	-16.3%
Dining Program	8.2	7.1	0.9	-87.3%
Facilities Services	11.3	10.7	6.8	-36.4%
Information Technology Services	1.2	1.1	1.0	-9.1%
Environmental Health & Safety	0.1	0.1	0.0	-100.0%
Residential Life	3.3	2.6	1.3	-50.0%
Debt Services	16.7	16.7	16.4	-1.8%
Capital / Deferred Maintenance	varies	10.9	0.0	-100.0%
Transfer in	0.0	0.0	5.5	
Ending fund balance		22.8	0.5	

Revenue Comparison

FY 2019/2020



FY 2020/2021



Housing Considerations

Housing feasibility is inextricably tied to the campus support and success:

- Student enrollment – housing is attractive to students due to availability, pricing and proximity to on campus academic resources;
- Many students need to live in housing to ensure their basic needs are met;
- Student success – freshmen living in student housing have a 10% higher GPA and 58% higher graduation rate in comparison with students living off campus;
- Staff and faculty access to apartments – provides housing to University employees at below the Bay Area market prices.

UBC Steering Committee Update

Jennifer Summit

Provost and Vice President

Academic Affairs

UBC Steering Committee met to review candidates for the four (4) new Staff representative member nominations:

1. 18 nominations were received among two labor bargaining units
2. Steering Committee members agreed to create a survey to rank candidates based on the following criteria, based on information from the nomination form:
 - Interest in the UBC
 - Potential contribution to the UBC
 - Diversity factor of the candidate (Cabinet division, department, labor union, position in the university, etc.)
3. Top ranked four candidates emerged
4. Co-chairs agreed with survey and sent their recommendation to President Mahoney for appointment, per the UBC Charge
5. Candidates accepted, and will officially join the December meeting:
 - **Jennifer Daly**, Academic Affairs, College of Liberal and Creative Arts, Dean's Office, CSUEU
 - **Dylan Mooney**, Academic Affairs, College of Health & Social Sciences, IT Helpdesk & Computer Lab, CSUEU
 - **Evrin Ozer**, University Advancement, Alumni Relations, Associate Director, CSUEU
 - **Renee Stephens**, Student Affairs & Enrollment Management, EOP Admissions/Outreach, APC

ACTION ITEM:

**2021-2022 Budget Timeline Process and
Recommendations**

Jeff Wilson

Interim Vice President & CFO
Administration & Finance



2021-2022 Budget Planning

November 19, 2020

San Francisco State University

Budget Planning

Planning framework

1. Set milestones
2. Scenario planning
3. Governor's January proposal
4. CSU/State advocacy and negotiations
5. Campus planning iterations
6. Governor's May proposal
7. Final state budget
8. Final campus budget

Budget Planning

1. Setting milestones

Budget Planning

November 2020

- CSU Budget Request

Budget Planning

December-February 2021

- SFSU Campus Budget Framework- Campus Leadership
 - Enrollment scenarios – Enrollment Management and Institutional Analytics
 - Curriculum and classes scenarios (PT faculty pool) – Academic Resources
 - Budget assumptions – Budget Administration & Operations
 - State allocation and other campus mandatory fees adjustments
 - Direct- salary, benefits
 - Indirect- utilities, insurance, financial aid

Budget Planning

January 2021

- Governor's budget proposal

February 2021

- Approved scenario for campus planning – CFO & President
- SF State Campus Budget Planning memo from President & CFO
- SF State Campus units develop Budget plans- Campus Planners

Budget Planning

January – July 2021

- CSU negotiates with State

March 2021

- Governor/Legislature negotiations

Budget Planning

April 2021

- SF State begins budget meetings with Cabinets VP's, CFO and President

May 2021

- Governor's Budget Revision

Budget Planning

May – June 2021

- Governor signs final State Budget
- SF State final revised scenario- Final B-memo- Budget Administration & Operations
- SF State Working Budget approved and finalized - President and CFO

Budget Planning

July 2021

- CSU provides campus allocations
- SF State Final Budget load in CFS – Budget Administration & Operations

August 2021

- SF State uploads FIRMS Budget Submission to Chancellor's Office-
Budget Administration & Operations

UBC Research & Service Organization (RSO)
Workgroup update
(first reading)

Dr. Genie Stowers

UBC faculty member and RSO Workgroup Lead

Public Administration Program / School of Public
Affairs & Civic Engagement (PACE)

RSO Workgroup Presentation

University Budget Committee

November 19, 2020

RSO Workgroup Presentation

Agenda

1. Charge
2. Members of Workgroup
3. Process
4. Principles
5. Observations
6. Macro Enrollment and Budget Scenarios
7. RSO Policy Recommendations
8. RSO Cost Savings Recommendations

RSO Workgroup Charge

“During this time of unprecedented budget challenge, San Francisco State’s costs are under review.

The Research Service Organizations (RSO) Workgroup is charged with reviewing the current costs and budget models governing RSOs in light of the university’s current budget cuts, reviewing RSOs’ (or equivalent centers’) budget practices on peer campuses, and developing recommendations for revising San Francisco State’s RSO budget practices in ways that would deliver significant cost savings in an expeditious timeframe.

By the end of November 2020, the Workgroup is asked to present multiple scenarios for consideration and discussion by the UBC, which will deliver its recommendations to the President.”

RSO Workgroup Members

- Andrew Carrillo
 - President, Associated Students
- Ian Dunham
 - Faculty, Management Department
- Sylvia Piao
 - University Controller
- Gitanjali Shahani
 - Chair, Department of English
- Genie Stowers, Workgroup Chair
 - Faculty, School of Public Affairs and Civic Engagement

Process

- Had little over 2 months to complete our task
- Reviewed RSO policies of SF State and other CSUs
- Split up RSOs into non self-sustaining and sustaining
- Met with all RSOs in 3 panels over 3 meetings
- Invited deans to provide input in writing
- Met to review what we learned and develop recommendations

Working Principles

- All RSOs contribute to the richness of our intellectual and scholarly life at SF State
- RSOs are no more or less responsible for solving our fiscal crisis than other units in the University.
- The University is currently in a fiscal crisis; all parts of the University should contribute to solutions to this crisis.
- Given the extreme variability of the RSOs and their funding structures, and the short time frame available to this Work Group, it is not appropriate for this Work Group to recommend specific cuts in specific RSOs.

Observations

- The existing policy is a SF State policy based upon CSU policies and guidelines; only slight updates have been made recently and it lacks requirements for specific funding structures or for self-sustainability.
- Extreme differences in funding structures and degree of funding from the General Fund exist across RSOs.
- SF State RSO policy context is very different from those at a majority of other CSUs.

Macro Enrollment and Budget Scenarios

Enrollment / Budget	Budget Situation Remains the Same or Worsens	Budget Situation Improves (more CARES funding or increased State funding)
Enrollment Numbers Remain the Same or Worsen	<i>Scenario 4-Most Dire</i> More cuts will be needed from every unit on campus	<i>Scenario 3-Middle Ground Budget Improvement</i> Some cuts will still be needed
Enrollment Numbers and/or Retention Rates Improve	<i>Scenario 2-Middle Ground Enrollment Improvement</i> Some cuts will still be needed	<i>Scenario 1-Most Optimistic</i> Fewer fiscal reductions will be required

Policy Recommendations

The existing RSO policy is at https://research.sfsu.edu/rso_policy

The policy should be updated to incorporate requirements for stronger financial reviews and financial sustainability.

Recommendations for the RSO Policy– Existing RSOs

- Must have a plan within 6 months to become self-sustaining
 - Self-sustaining is defined as no additional use of University General Funds for release time, salary, benefits, student employment, and/or other expenses except for space.
 - Move all non-salary expenses, including student employment, to external funding over time.
- Must become self-sustaining within 3 years; extension, exemptions, or exceptions may be approved by the President.
 - Reviews of RSOs should more clearly focus on self-sufficiency in a way that includes release time, salary, benefits, student employment, and/or other expenses.
- If self-sufficiency is not accomplished, the RSO must report to the President to explain their status and the President may grant an extension, exemption, or exception (see above).

Recommendations for the RSO Policy– New RSOs

- Often, faculty want to create a center or institute (RSO) to accomplish certain aims. They should be encouraged to consider other possibilities besides these very specific and resource-intensive types of organization.
- When starting up an RSO, any proposals for initial seed funding from the General Fund and a realistic timeline for financial self-sustainability should be incorporated into the initial proposal. This portion of the proposal would need to be approved by the jurisdictional administrator prior to the overall approval of an RSO.
- No more than three years should be allowed for a new RSO to become financially self-sustaining.

Potential Budget Decisions and Outcomes Dependent on Larger Environment of Macro Enrollment and Budget Scenarios

Scenario 1-Most Optimistic

- RSOs receiving General Fund monies should make decisions on how and where to cut 2.5% of their budget and forward those decisions to their VP.

Scenario 2-Middle Ground Enrollment Improvement / Scenario 3- Middle Ground Budget Improvement

- RSOs receiving General Fund monies should make decisions on how and where to cut 5% of their budget and forward those decisions to their VP.

Scenario 4-Most Dire Recommendations

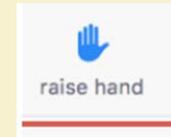
- RSOs receiving General Fund monies should make decisions on how and where to cut 10-15% of their budget and forward those decisions to their VP.

PUBLIC FORUM

15 minutes, three minutes per speaker

Please:

- ✓ "Raise your Hand" (*found on your Participants menu, lower left corner*)
*Unmute yourself when called upon to speak. For transparency, please begin with your **name, title, department or campus affiliation**, then Mute when finished, to reduce noise*
- ✓ Limit to one question, so everyone has a chance to speak.
You can "Raise your Hand" again with a follow up question, if time allows.
- ✓ Thank you for sharing this space respectfully with our community members ~





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