



Welcome!

UBC guests: Please ensure your full name shows

- ◆ Please use the “raise hand” function for questions
- ◆ We’ll do our best to address questions posted in the Chat
 - ◆ *Public forum begins approximately 11:45AM*
- ◆ Today’s presentations will be posted to the UBC webpage

next UBC meeting of Fall 2023 semester:

Thursday, December 14, 2023, 10:00 AM – 12:00 PM via Zoom

Welcome

from UBC Co-Chairs

Amy Sueyoshi
Provost & Vice President
Academic Affairs

Jeff Wilson
CFO & Vice President
Administration & Finance

Share Your Thoughts

UBC Meetings

Attend and participate in the public forums

UBC Office Hours

Attend a UBC member peer-hosted Office Hour on **Fridays** after UBC

Tomorrow, Nov. 17th

By Email

UBC@sfsu.edu
Shared with UBC Steering Committee

Personally

Reach out to a member and they can share knowledge and bring input back to UBC

UBC Webpage

<https://adminfin.sfsu.edu/ubc>

Click on the

Feedback and Questions

button

UBC Office Hours

Members of the University Budget Committee (UBC) invite you to attend UBC office hours to provide your feedback on meeting presentations, to suggest topics for future meetings, to discuss university budget-related questions, etc. This is an opportunity to dialogue directly with your UBC member-peers, as sessions are offered specifically for staff and faculty/MPPs.

UBC OFFICE HOURS

(tomorrow) **Friday, Nov. 17, 2023**

Faculty & MPP: 11:00 AM – 12:00 PM

Staff: 11:00 AM – 12:00 PM

RSVP to: ubc@sfsu.edu

All meetings take place via Zoom

AGENDA

Welcome/Office Hours/Agenda Review

Wilson

Member rollcall

UBC coordinator

Minutes Approval (UBC Oct. 2023 meeting)

Wilson

President's Message

Mahoney

Divisional Budget Strategies: University Advancement

Jackanicz/Thompson-Ramsay

SF State Budget Update

Wilson/Stoian

BREAK (5 mins.)

Divisional Budget Strategies: Office of the President

De Paz Fernandez/Trang/Lim-Tepper

UBC Feedback

Kim/Wilson

Public Forum

ALL

Member Rollcall

Approval of Minutes

from UBC meeting Oct. 19, 2023

All past meeting minutes can be found on the UBC Webpage

President's Message



University Advancement

November 16, 2023

Jeff Jackanicz, Vice President
Venesia Thompson-Ramsay, AVP Operations

About Us

- University Advancement exists to secure philanthropic support for SF State; create awareness and generate support for its academic and research programs; and build a culture of philanthropy at SF State.
- We support the entire University – faculty, staff, students and alumni, in particular.
- We have a staff of about 61.
- Base Budget FY 23-24 = \$6.4 million or 2% of SF State Budget.

University Advancement Units

- Advancement Services – processes gifts and manages University’s donor database (CRM).
- Alumni Relations & University Engagement – engages alumni and plans signature events.
- Strategic Marketing & Communications – promotes the university.
- University Development – raises money for the University.
- Vice President’s Office – provides division-wide oversight and operations.

UA Related Unit – SF State Foundation

- An independent 501c3 philanthropic foundation that exists solely to manage endowed gifts on behalf of SF State.
- The Foundation's operations are managed by University Advancement staff.
- The Foundation provides an annual subsidy to University Advancement.
- The Foundation's board increased its subsidy for FY 2023 – 2024 from \$515K to over \$830K.

Resources Management since 2020

1. We work with SF State Foundation to increase subsidy to decrease dependence on general funds.
2. We imposed a hiring freeze and layoff for a total decrease of 11 positions (from 72 to 61) across Advancement (more efficient in our operations).
3. Created operational efficiencies in SMC with centralization of some college-based marketing and communications positions.
4. We deferred our single biggest non-personnel expense (CRM). Now completing migration.
5. Used carryforward to cover some critical one-time costs to supplement University investment in market research.

University Advancement Operating Budget, FY 23-24*

	FY2022-23 Budget	Changes for FY 23-24	FY2023-24 Budget	% Change
Revenues (SF State Foundation)	(\$515,000)	(\$197,523)	(\$712,523)**	38%
Salaries and Wages				
Reallocation/budget reduction		(\$174,690)		
Marketing Staff & Filled Vacancies		\$754,426		
Total Salaries and Wages	\$5,822,996***	\$579,736	\$6,402,732	10%
Operating Expenses	\$744,785	(\$65,378)	\$679,407	(9%)
Total Budget	\$6,052,781	\$316,835	\$6,396,616	5%

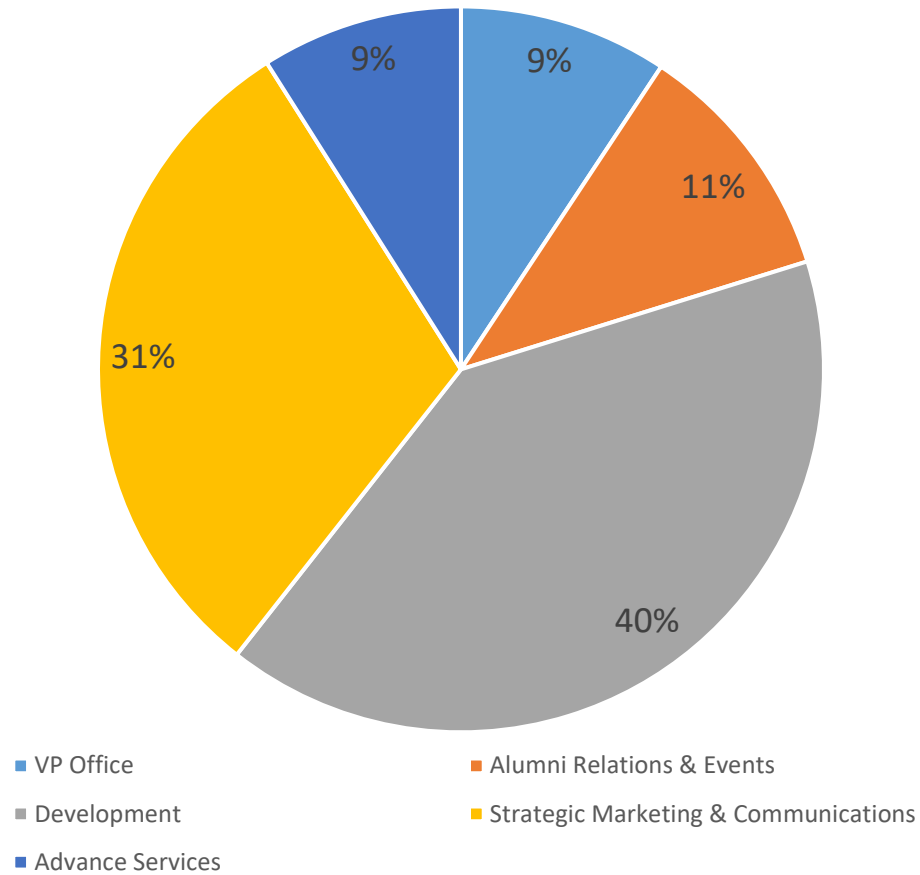
*Does not include \$624K of pass-through funds for University-wide projects and initiatives

** This amount does not include \$118K for benefits.

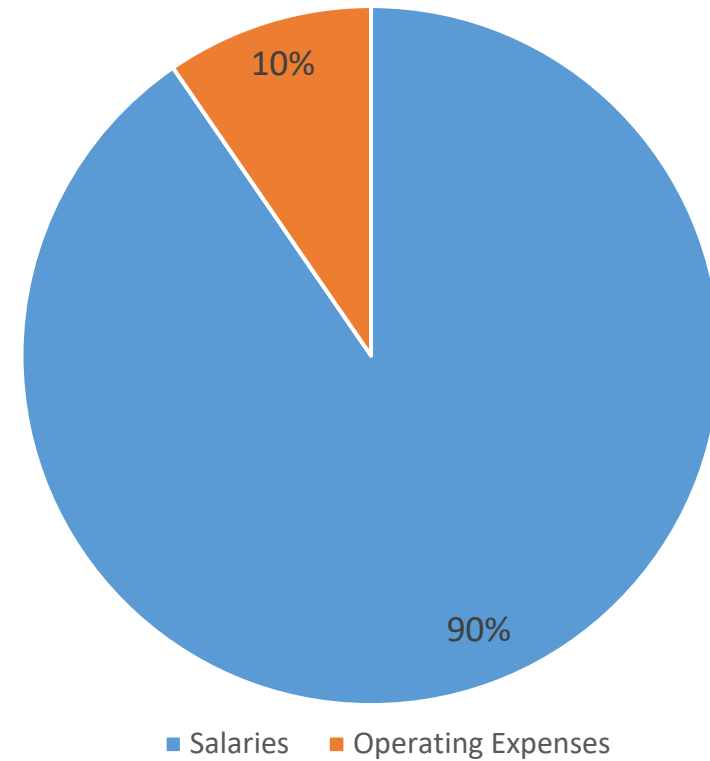
*** This amount includes partial salaries for unfilled positions

University Advancement Budget

Budget By Unit



Salary Vs Op Exp



Thank you!

Questions?

SF State Budget Update

Jeff Wilson

CFO & Vice President
Administration & Finance

2023-24 and 2024-25 Updates

- Final 2023-2024 Budget will be revised when final employee compensation for 2023-2024 is resolved.
- Initial 2024-2025 University-Level Budget and related assumptions and scenarios will be presented at December UBC Meeting.
- Revised Multi-Year Budget Realignment Plan will be presented at December UBC Meeting (and in future briefings in Spring 2024).
- Governor's January State Budget Proposal will be released in mid-January.

Questions?

5 Minute Break



University Budget Committee
November 16, 2023

Office of the President

Office of the President Overview

- **President's Office Staff**
- **Government & Community Relations**
- **NAGPRA***

***NAGPRA joined the Office of the President in FY 22-23**

Lynn Mahoney, Ph.D.
President

Noriko Lim-Tepper, Ed.D.
Chief of Staff

Luis De Paz Fernandez
Presidential Assistant for
Strategic Initiatives &
Executive Assistant

Teddy Albiniak, Ph.D.
Special Assistant to the
President & Provost

Bobby King
Director of
Communications

Mary Lee
Administrative
Coordinator

Zay Latt
Director,
Office of Government
& Community Relations

Victor Aguilar
Presidential Aide

Elise Green
Tribal Government
Relations Lead,
NAGPRA Program

FY 19/20-23/24 Budget Planning

Office of the President	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24
Revenue	(12,441)	(12,815)	-	-	-
Salaries/Wages	1,581,653	1,212,468	1,234,335	1,297,715	1,364,805
Operating Expenses	282,424	271,036	283,850	152,605	157,183
	1,851,636	1,470,689	1,518,185	1,450,320	1,521,988
		-21%	3%	-4%	*5%

*Reflects mandatory salary increases.

FTEs Planning

FTEs	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24
MPP	6.5	5.5	5.0	5.0	5.0
Staff	4.0	3.0	3.0	4.0	3.5
Total	10.5	8.5	8.0	9.0	8.5

Thank you!

Questions?

UBC Feedback

John Kim

Interim Vice Provost
Academic Resources

Jeff Wilson

CFO & Vice President
Administration & Finance

UBC's Charge:

“UBC serves as a deliberative body that provides the San Francisco State University President with ongoing advice and recommendations related to budget policy, planning, and assessment.

The UBC aims to ensure that the University's priorities are reflected in its budget through coordinated consultation, discussion, education, and outreach to the University community.

Members of the UBC, with a shared commitment to transparency in fiscal decision-making, serve to advise the University and community about budget matters, and bring concerns of the students, faculty and staff to the administration.”

Please note:

- UBC does not create or manage the university budget; it supports transparency by helping to expand budget literacy, share resources and listen to the campus community.
- UBC receives feedback from the campus community in various ways, including through its members who are your peers: staff, faculty, students, administrators. Each has a seat on the UBC Steering Committee, which will direct feedback to the appropriate resource and/or, consider the topic for a future presentation at UBC.

These two topics have come to UBC for transparency a few times, so today we'll help clarify:

- The \$1.5M restoration in Academic Affairs (response from John Kim)
- SF State's reserves & designated balances (response from Jeff Wilson)

UBC Feedback and Questions

College lecturer pool	22,789,990
5M reduction to lecturer pool (22.94%)	(5,000,000)
Lecturer pool, FY23-24 PBCS budget plan	17,789,990

5M reduction in Spring only → try to return about 1.5M

College lecturer pool in FY23-24 budget plan	17,789,990
returned 22.94% of fixed costs in lecturer pool	1,630,219
revised College lecturer pool	19,420,209

UBC Feedback and Questions

SF State's 2022 – 2023 Reserves and Designated Balances

June 30, 2023

Reserves	\$15,888,627
Designated Balances	<u>104,395,813</u>
Total	\$120,284,439

UBC Feedback and Questions

SF State's 2022 – 2023 Designated Balances

June 30, 2023

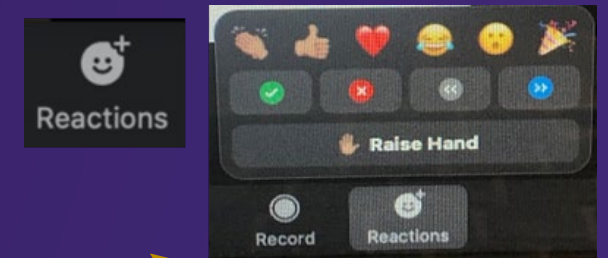
Capital Projects	\$4,024,673
Financial Aid	7,260,065
Program Development	4,278,315
Future Debt Service	4,155,000
Encumbrances	14,411,115
Outstanding Commitments	<u>70,266,644</u>
Total	\$104,395,813

Public Forum

Open to all guests and UBC members

Please:

- ✓ **“raise your hand”** (*found on your Reactions menu, lower right corner*)
Unmute when called upon to speak. For transparency, please begin with your name, title/department. Mute when finished to reduce noise please.
- ✓ **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**



We appreciate your interest in our University's budget process and the service of our UBC members and guests, in support of our students and all our Gator families.

Check our UBC webpage for information, past meeting materials, meeting updates and how to contact the UBC

<https://adminfin.sfsu.edu/ubc>