



SAN FRANCISCO
STATE UNIVERSITY

University Budget Committee

March 17, 2022

Welcome!

UBC guests: please ensure your full name shows

All: Please use the “raise hand” function for questions

Public forum is at approx. 10:40 AM

We'll do our best to address questions posted in the Chat

Today's presentation will be posted to the UBC webpage

RSVP to ubc@sfsu.edu to attend UBC Office Hours tomorrow 10:00AM for Staff and Faculty/Mpps

The April UBC meeting has changed from Thursday the 21st to Friday the 22nd

Welcome

from UBC Co-Chairs

Jennifer Summit

**Provost & Vice President
Academic Affairs**

Jeff Wilson

**Vice President & CFO
Administration & Finance**

Share Your Thoughts

UBC Meetings

Attend
And participate
in the public
forum

UBC Office Hours

Virtual
UBC member &
peer-hosted
on Fridays
after UBC

By Email

UBC@sfsu.edu
Shared with
UBC Steering
Committee

Personally

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

UBC Webpage

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

Click on the

Feedback and Questions

button

UBC Office Hours

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

UBC MEETINGS	UBC OFFICE HOURS
Thursday, March 17, 2022 10:00 AM – 12:00 PM	Friday, March 18, 2022 10:00 AM – 11:00 AM
Friday, April 22, 2022 10:00 AM – 12:00 PM	TBD
Thursday, May 26, 2022 10:00 AM – 12:00 PM	Friday, May 27, 2022 10:00 AM – 11:00 AM

RSVP to: ubc@sfsu.edu

All meetings take place via Zoom

AGENDA

- | | |
|---|---|
| 1. Member rollcall | UBC staff |
| 2. Minutes Approval (Feb 10 meeting) | Provost Summit |
| 3. President's Message | President Mahoney |
| 4. Presentations: | |
| • Enrollment Trends and Projections | K. Lynch/S. Sujitparapitaya/Lori Beth Way |
| • 2022-2023 Preliminary Budget Planning | E. Stoian |
| 5. Updates/Informational Item: | |
| • IDC workgroup | Dean Sivadas |
| • Chargeback Committee | J. Wilson |
| 6. Action Item: | |
| • 1 st Reading: Budget Scenarios | J. Wilson/E. Stoian |
| 7. Public Forum | ALL |

Member Attendance and Changes

- **Member Roll Call**
- **Change to UBC Faculty membership**
 - **Thank you to outgoing member: Benjamin Kumli**
 - **Welcome to New UBC Member Gretchen LeBuhn**

Approval of Minutes

February 10, 2022

All past meeting minutes can be found on the UBC Webpage

President Lynn Mahoney



Enrollment Update: Spring 2022 & CY 2021-2022









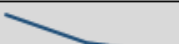




*University Budget Committee
March 17, 2022*

*By Sutee Sujitparapitaya
Associate Provost, Institutional Analytics*

*Katie Lynch
Senior AVP, Enrollment Management*

*Lori Beth Way
Dean, Undergraduate Education and Academic Planning*

Spring Enrollment (*Headcount*) Trends

New Students	S20	S21	S22	Trend	S21 vs.S22	
1st Time Freshmen	52	47	106		59	126%
New UG Transfers	954	1,250	1,192		(58)	-5%
New Pbac	79	77	52		(25)	-32%
1st Time Graduates	236	339	230		(109)	-32%
Total	1,321	1,713	1,580		(133)	-8%
Continuing Students	S20	S21	S22	Trend	S21 vs.S22	
Undergraduates	22,840	20,892	20,045		(847)	-4%
2BA/Pbac	211	239	230		(9)	-4%
Graduates	2,419	2,477	2,609		132	5%
Total	25,470	23,608	22,884		(724)	-3%
Total	S20	S21	S22	Trend	S21 vs.S22	
Undergraduates	23,846	22,189	21,343		(846)	-4%
2BA/Pbac	290	316	282		(34)	-11%
Graduates	2,655	2,816	2,839		23	1%
Total	26,791	25,321	24,464		(857)	-3%

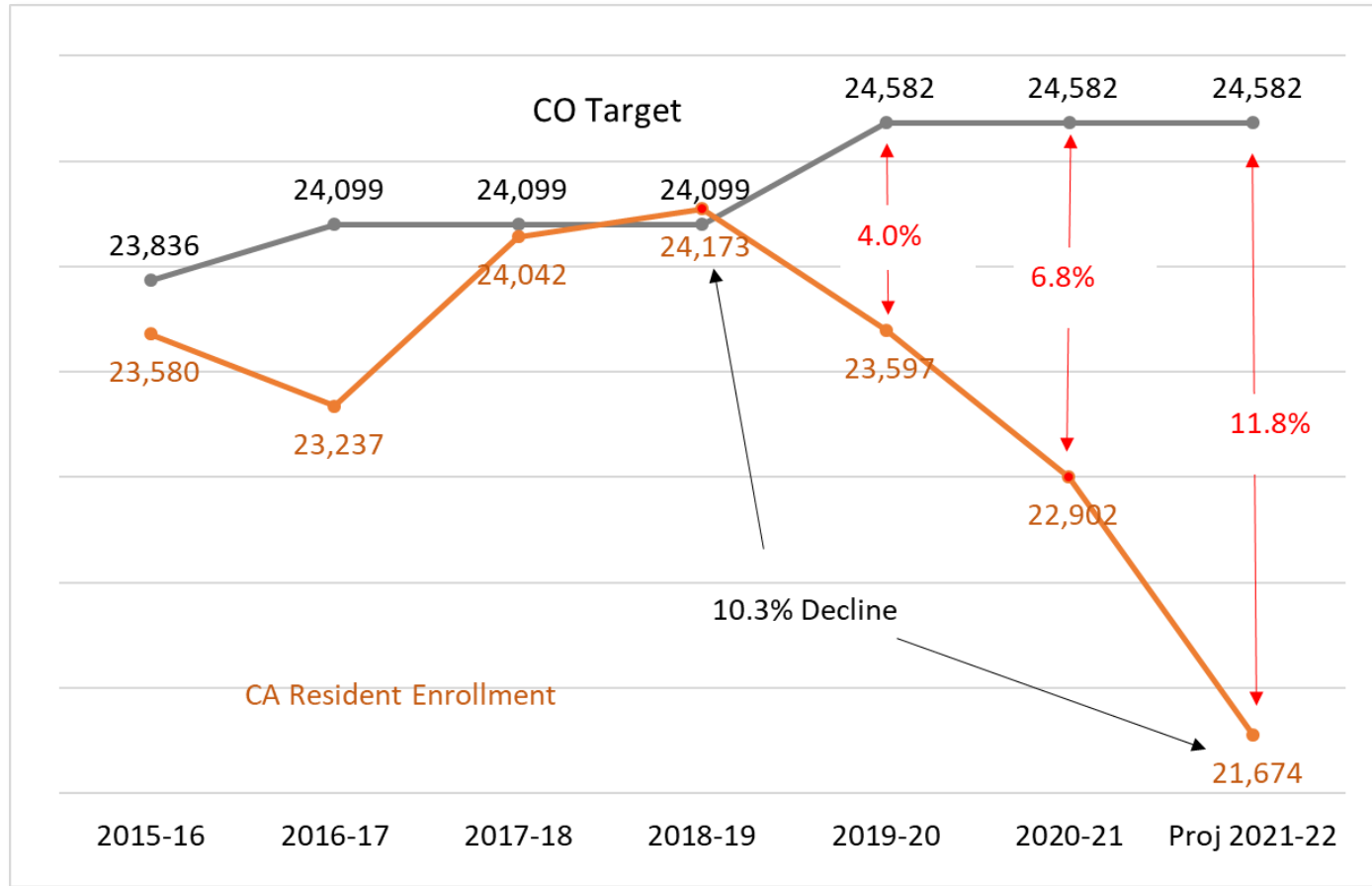
Fall to Spring Retentions

	Cohort Term							
	Fall 2020			Fall 2021				
Student Level	# Initial Fall Census	# Returning Spring	% Returning Spring	# Initial Fall Census	# Returning Spring	% Returning Spring	Same % Return as last year	% Chg
a.Cont.Freshmen	2,035	1,631	80.1%	1,813	1449	79.9%	1,452	(3)
b.Cont.Sophomores	3,244	2,920	90.0%	2,781	2,515	90.4%	2,503	12
c.Cont.Juniors	4,658	4,188	89.9%	4,373	3,787	86.6%	3,931	(144)
d.Cont.Seniors	8,194	5,989	73.1%	8,209	5,876	71.6%	6,001	(125)
e.Cont.2nd/Pbac	206	129	62.6%	215	126	58.6%	135	(9)
g.Cont.Graduate	1,788	1,444	80.8%	1,897	1,505	79.3%	1,533	(28)

First-year retention for Fall 2020 first-time freshmen improved 2.5% from the previous year (from 79.9% to 82.4%). Slightly declined for new undergraduate transfers 1.7% (from 88.8% to 87.1%)

CA Resident Enrollment (*FTES*)

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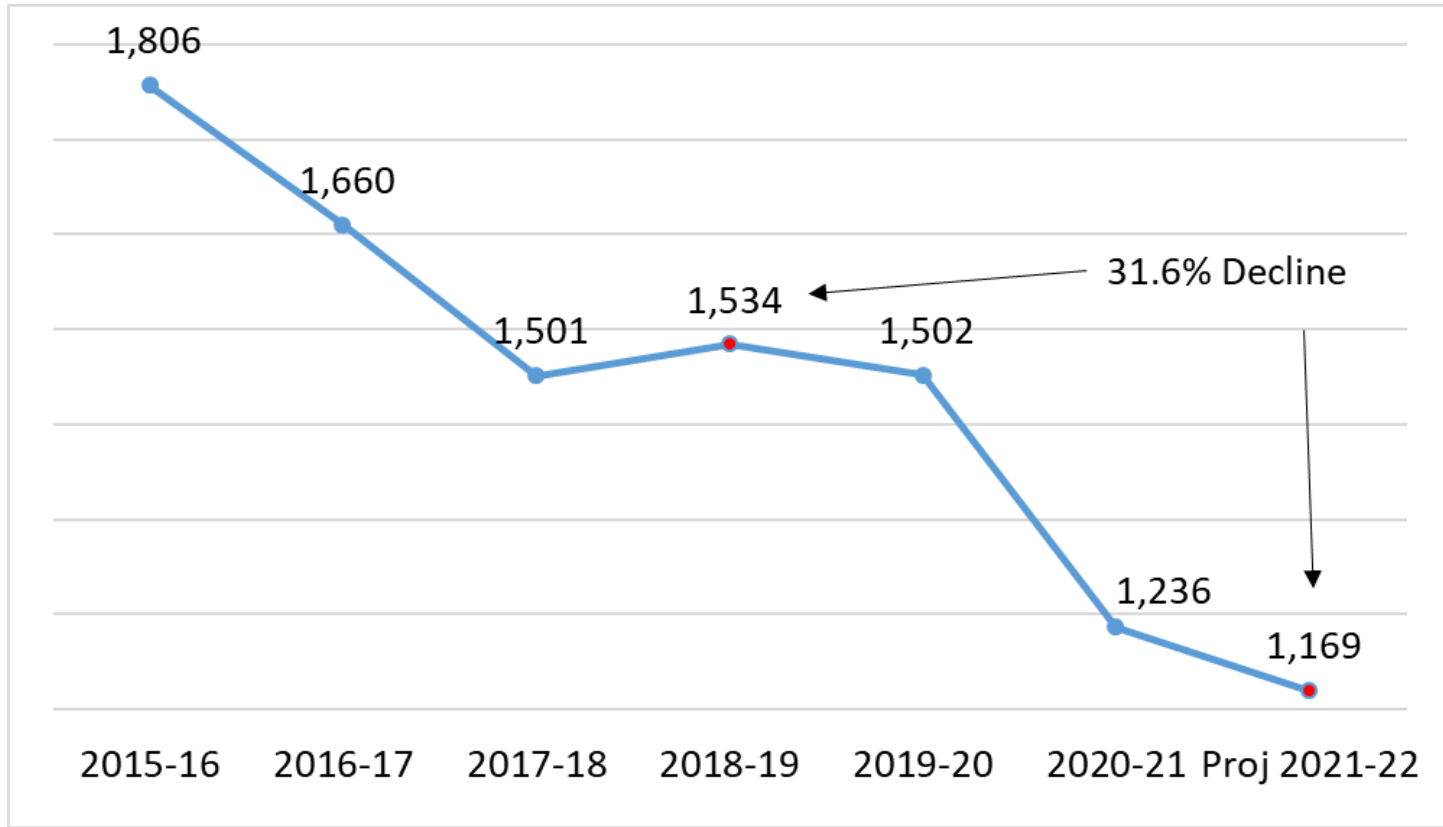
	CO Target	CA Resident	% +/- CO Res Target	% Change (Year to Year)
2015-16	23,836	23,580	-1.1%	
2016-17	24,099	23,237	-3.6%	-1.5%
2017-18	24,099	24,042	-0.2%	3.5%
2018-19	24,099	24,173	0.3%	0.5%
2019-20	24,582	23,597	-4.0%	-2.4%
2020-21	24,582	22,902	-6.8%	-2.9%
Proj 2021-22	24,582	21,674	-11.8%	-5.4%

- Based on the preliminary CY 2021-22, we will come about 11.8% below the CO assigned target.
- For the last 3 years (between 2018-2019 and 2021-2022), CA resident enrollment (FTES) had declined 10.3%

- CO Target = Chancellor's Office assigned target for CA residents
- FTES = Full-time Equivalent Students: 1 FTES = 15 credits per semester for undergrads and 12 for graduates
- CY 2021-22 Projection

Non- CA Resident Enrollment (FTEs)

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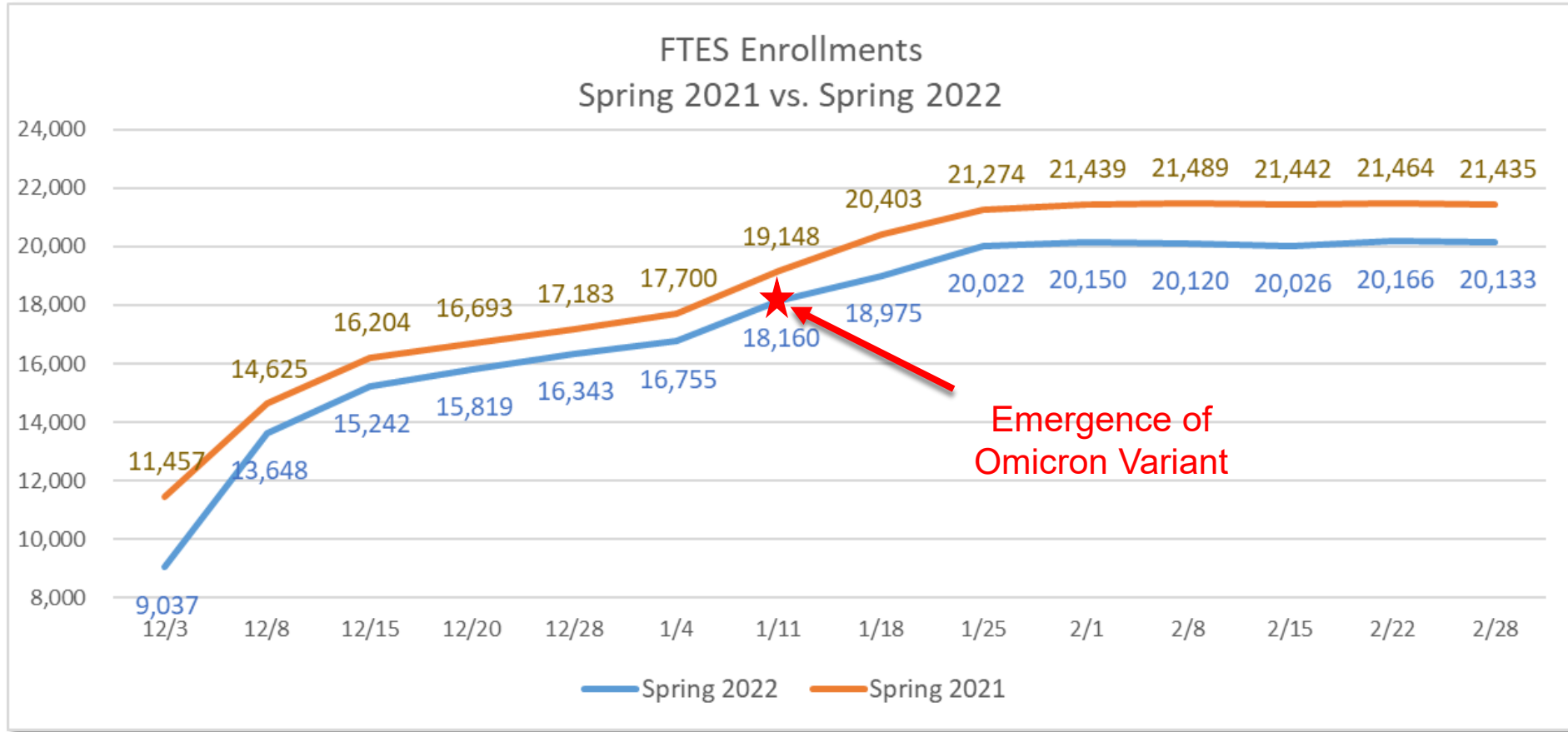
• Non-CA Residents = Outside CA Students + Internationals

	Non-Resident FTEs	% Change (Year to Year)
2015-16	1,806	
2016-17	1,660	-8.1%
2017-18	1,501	-9.6%
2018-19	1,534	2.2%
2019-20	1,502	-2.1%
2020-21	1,236	-17.7%
Proj 2021-22	1,181	-4.4%

- Non-resident enrollment continued to decline (5 out of last 6 years).
- Significant declined – 17.7% last year alone *and* 4.4% this year.
- For the last 3 years (between 2018-2019 and 2021-2022), non-resident enrollment (FTEs) had declined 31.6%

Spring 2022 Tracking

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Take Away

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Undergraduates:

- Incoming undergraduates flat to last year but largely due to freshman starting in the spring
- Continuing undergraduates dropped significantly due to
 - lower retention rates for juniors and seniors
 - declined in first-time freshmen and new UG transfers (3 out of last 4 years)

Graduates:

- Declined in new and continuing graduates since the pandemic began in 2020

CA Residents:

- For the last 3 years, CA resident FTEs had declined 10.3%
- Will come about 11.8% below the CO assigned target.
- Spring 2022 projection had been on track for 10% below the CO target until Omicron variant disrupted at the beginning of January 2022.

Non-residents (*Outside CA students + Internationals*):

- Non-resident enrollment continued to decline (5 out of last 6 years)
- For the last 3 years, non-resident FTEs had declined 31.6%

Retention and Equity Work

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Re-engage and Re-enroll Underserved Students

Expand Credit Opportunities

Equitable Access to Degree Planner

Eliminate Administrative Barriers to Graduation

Promote Equitable Learning Practices and Reduce DFW Rates

Incoming Undergraduate Students

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Immediate:

- Fall 2022 Undergraduate Accepted Admission Offers are lagging behind last year
- Admitted Student Packets, Digital Marketing Retargeting, Early Financial Aid Offers, in-person/virtual events
- Sign up to help in the effort to strengthen our incoming class
 - [Help out](#) on April 9, 2022 for our Explore SF State Admitted Student Day
 - [Join our calling campaign](#) to admitted students!

In the Works:

- Brand/Enrollment Marketing Campaign development and roll out in May to increase applications
- Partnerships with high schools and community colleges to streamline data sharing and increase applications
- Improved admissions communication plan to speak more directly to students and families at each stage of the enrollment process
- Renewed recruitment strategy focused on maximizing our impact per visit
- Streamlined processes within our student information system to reduce administrative barriers to students

Future:

- Enrollment focused website redesign (RFP ends late Fall 2022; work starts 2023)
- Maximizing the use of our CRM to track & engage students and families earlier in the enrollment pipeline
- Improved scholarship leveraging to increase student likelihood to attend

Member Dialogue

At this time, questions from UBC voting and non-voting members only.

2022-2023 Preliminary Budget Planning

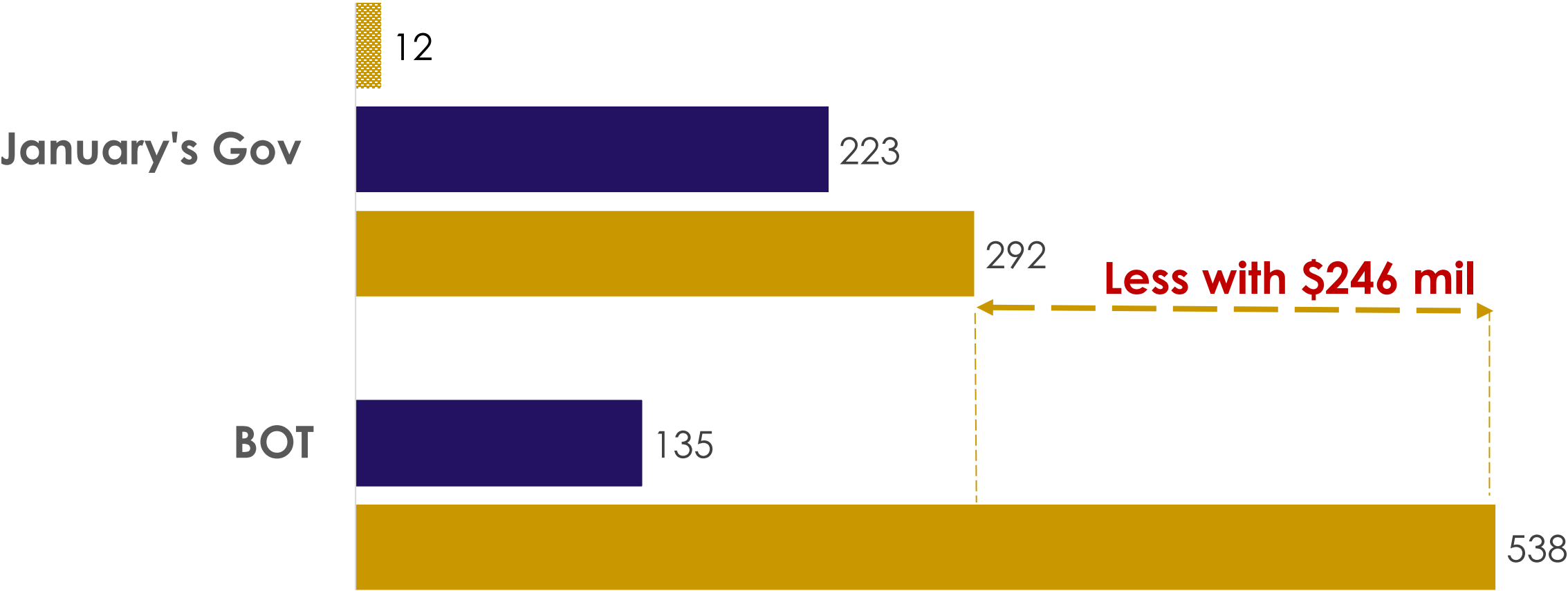
Elena Stoian
Executive Director
Budget Administration & Operations
Administration & Finance

1. FY 2022-23 CSU Preliminary B-Memo (March)
2. FY2022-23 Campus Scenarios Planning First Review

CAMPUS BUDGET PLANNING FRAMEWORK

- Governor's January Proposal (**Released On January 10th,2022**)
- CSU/Advocacy And Negotiations (**Ongoing**)
- **Campus Scenarios Planning (Revenue And Expenditures Planning Assumptions)**
- Campus Units Planning
- Governor's May Proposal
- June State Budget
- Final Campus Budget

■ Foster Youth Support ■ Academic Facilities and Infrastructure ■ General Fund, Operations



FY 2021-22 State Allocation	\$198,812
FY2021-22 State-Funded Retirement Adjustment	-315
Health Premiums	814
FY2021-22 Compensation (4% CFA)	6,722
FY2022-23 Compensation Adjustment (3% CFA & 2.65% PPI)	<u>6,110</u>
FY2022-23 Expenditure Adjustment	\$13,331
FY 2022-23 State Allocation (March B Memo)	\$212,143

Resources (revenues) – State appropriation

Scenario	Budget
FY2021-22 Budget	\$198,812,000

Resources (revenues) – Tuition and fees

Scenario	FY2021-22 Budget
FY2021-22 Budget	\$174,594,107

Scenario	\$ Adjustment	FY2022-23 Budget
1 – Good case (-11.5% to target; -6.1% to 21-22)	8,237,331	166,356,776
2 – Medium case (-14.8% to target; -9.4% to 21-22)	15,037,331	159,556,776
3 – Worst case (-18.7% to target; -13.5% to 21-22)	21,937,331	152,656,776

Resources (revenues) – Other revenues

Scenario	FY2022-23 Budget
FY2021-22 Budget	\$11,731,224

Resources (revenues)

Same state appropriation and other revenues with three tuition and fees scenarios.

Scenario	State Appropriation	Tuition and Fees	Other Revenues	Total
1 – Good case	\$198,812,000	\$166,356,776	\$11,731,224	\$376,900,000
2 – Medium case	198,812,000	159,556,776	11,731,224	370,100,000
3 – Worst case	\$198,812,000	\$152,656,776	\$11,731,224	\$363,200,000

Costs (expenditures) Based on Winter Forecast

Component	FY2022-23 Budget
FY2021-22 Winter Forecast Expenditure Base	\$380,900,000
FY2022-23 Total Costs	\$380,900,000

¹ The state-funded salary actions and their mandatory costs are not included

How to address FY2022-23's scenario

	Best case	Medium case	Worst case
Resources (revenues)	\$376,900,000	\$370,100,000	\$363,200,000
Costs (expenditures)	<u>380,900,000</u>	<u>380,900,000</u>	<u>380,900,000</u>
Surplus/(Deficit)	(\$4,000,000)	(\$10,800,000)	(\$17,700,000)

Action Item

Should the UBC recommend to the President the scenarios presented?

Next steps

President will direct Vice Presidents to plan according to recommended scenarios. Vice Presidents will present proposed budgets to UBC beginning in May.

CAMPUS BUDGET PLANNING FRAMEWORK

- Governor's January Proposal (**Released On January 10th,2022**)
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IDC Workgroup Update

March 17, 2022

The Workgroup

Dwayne Banks, Vice Provost for Academic Resources

Jennifer Daly, Personnel Manager, College of Liberal & Creative Arts

Michael Goldman, Professor of Biology

Eugene Sivadas, Dean, Lam Family College of Business (Lead)

Elena Stoian, Executive Director, Budget Administration & Operations

Action Plan

- Listening and Fact-Finding Sessions
- We hope to incorporate multiple perspectives and get a complete picture.
- We have completed all Interviews.
- Final Report Due: April 21, 2022

Whom did we interview

Michael Scott, AVP of Research and Sponsored Programs

Sylvia Piao, University Controller

Crystal Kam, CBO, CoSE and John Elia, Associate Dean, HSS

College Deans

Gretchen Le Buhn, Professor of Biology & Chair, URISCA

Faculty Focus Group with active grant recipients.

Health Equity Institute (RSO)

Dr. Ganesh Raman, Chancellor's Office, AVC for Research

Melissa Mullen, Chancellor's Office, Director of Sponsored Programs

Tammie Ridgell, Associate VP of University Corporation

Grant Administrators in ORSP

What Next

We are crafting recommendations:

- Individual PI
- Departments
- College Deans
- ORSP
- Academic Resources
- Cabinet (A&F, Development, CPDC/UCorp, Provost, and President)

What do the Recommendations Entail

- Creating Transparency & Consistency in IDC Distribution
- Role of ORSP
- Bigger Picture Issues

Member Dialogue

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Chargeback Committee Update

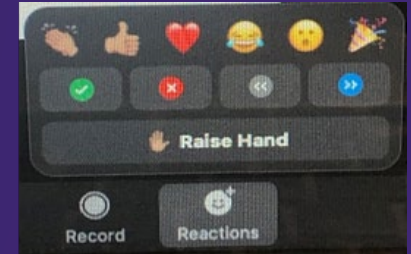
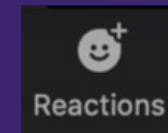
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Public Forum

Open to all guests and UBC members

Please:

- ✓ “Raise your Hand” (*found on your Reactions menu, lower right corner*)
Unmute yourself when called upon to speak. For transparency, please begin with your name, title/department. 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



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 Gator families.

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

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

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