



SAN FRANCISCO  
STATE UNIVERSITY

# University Budget Committee

March 21, 2024

## Welcome!

**UBC guests:** Please ensure your full name shows onscreen

- ◆ 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 Spring 2024:

Thursday, April 18, 2024, 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 drop-in UBC member peer-hosted Office Hour on **Fridays** after UBC

Tomorrow, March 22<sup>nd</sup>

## By Email

[ubc@sfsu.edu](mailto: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, March 22, 2024**

**Faculty & MPP:** 11:00 AM – 12:00 PM

**Staff:** 11:00 AM – 12:00 PM

**RSVP to:** [ubc@sfsu.edu](mailto:ubc@sfsu.edu)

All meetings take place via Zoom

# AGENDA

Welcome/Office Hours/Agenda Review	Jeff Wilson
Member rollcall	UBC coordinator
Minutes Approval (UBC Dec. 2023 meeting)	Jeff Wilson
President's Message	Lynn Mahoney
Enrollment Update	Katie Lynch, Sutee Sujitparapitaya, Lori Beth Way
Budget Update	Jeff Wilson / Elena Stoian
<b>BREAK (5 mins.)</b> -----	
Risk Pool Costs, Challenges and Successes	Mike Beatty
IDC (Indirect Cost) Workgroup Policy in first reading	Eugene Sivadas
Multi-Year Budget Realignment Advisory Committee (MBRAC)	John Kim
Responses from UBC Office Hours (postponed)	Jeff Wilson
Public Forum	ALL

# Member Rollcall

UBC member updates:

- Welcome new interim UBC Staff-representative members Afitap Boz (CPaGE) and Mary Menees (Grad Studies & Career Development)
- UBC has Staff and Faculty member seats open for the Fall 2024-Fall 2027 term.
- If you're interested or know a colleague who might be, email [ubc@sfsu.edu](mailto:ubc@sfsu.edu) for the nomination form.  
Deadline to apply is April 11<sup>th</sup>

# Approval of Minutes

## from UBC meeting Feb. 22, 2024

All past meeting minutes can be found on the UBC Webpage

# President's Message





# Enrollment Update

*University Budget Committee Meeting  
March 21, 2024*

*By Sutee Sujitparapitaya  
Associate Provost for Institutional Analytics*

*Katie Lynch  
Senior Associate Vice President for Enrollment Management*

*Lori Beth Way  
Vice Provost of Academic Planning and Dean of Undergraduate Education*

# Student (Headcount) Enrollment – Spring Semesters (@Census)

New Students	Spring 2020	Spring 2021	Spring 2022	Spring 2023	Spring 2024	5-Spring Trend	S24 vs. S23
1st Time Freshmen	52	47	107	118	90		-23.7%
LD Transfer	42	45	80	117	121		3.4%
UD Transfer	912	1,205	1,111	1,027	833		-18.9%
New Pbac	79	77	52	51	69		35.3%
1st Time Graduates	236	339	230	235	237		0.9%
<b>Total</b>	<b>1,321</b>	<b>1,713</b>	<b>1,580</b>	<b>1,548</b>	<b>1,350</b>		<b>-12.8%</b>
Continuing Students	Spring 2020	Spring 2021	Spring 2022	Spring 2023	Spring 2024	5-Spring Trend	S24 vs. S23
Undergrads	22,840	20,892	20,043	19,061	18,090		-5.1%
2BA/Pbac	211	239	231	192	187		-2.6%
Graduates	2,419	2,477	2,609	2,536	2,402		-5.3%
<b>Total</b>	<b>25,470</b>	<b>23,608</b>	<b>22,883</b>	<b>21,789</b>	<b>20,679</b>		<b>-5.1%</b>
Total	Spring 2020	Spring 2021	Spring 2022	Spring 2023	Spring 2024	5-Spring Trend	S24 vs. S23
Undergraduates	23,846	22,189	21,341	20,323	19,134		-5.9%
2BA/Pbac	290	316	283	243	256		5.3%
Graduates	2,655	2,816	2,839	2,771	2,639		-4.8%
<b>Total</b>	<b>26,791</b>	<b>25,321</b>	<b>24,463</b>	<b>23,337</b>	<b>22,029</b>		<b>-5.6%</b>
<b>FTES =</b>	<b>22,742</b>	<b>21,435</b>	<b>20,137</b>	<b>19,435</b>	<b>18,391</b>		<b>-5.4%</b>

## New Students:

- First-time freshmen and upper division transfer students declined this spring
- Lower division transfers and new graduates showed slight improvement

## Continuing Students:

- Undergraduate students continued declining - 5.1% drop this semester
- Graduate students declined after strong improvement during the pandemic

## Overall:

- 5.6% decline in total student enrollment.
- Total headcount of 22,029 students is the smallest student body in 47 years (Spring 1977 = 22,985 Students)

# Student Enrollment, by Residence Status (@Census)

Headcount Enrollment							
	Spring 2020	Spring 2021	Spring 2022	Spring 2023	Spring 2024	5-Spring Trend	S24 vs. S23
CA Resident	25,235	24,071	23,221	22,035	20,762		-5.8%
Non-Res Domestic	337	294	309	304	298		-2.0%
Nr International	1,219	956	933	998	969		-2.9%
Total	26,791	25,321	24,463	23,337	22,029		-5.6%

## Headcount Enrollment:

- CA resident students continued declining – 5.8% this spring alone
- Non-CA residents declined of 2.0% this semester
- International students also declined after an increase last year

FTES							
	Spring 2020	Spring 2021	Spring 2022	Spring 2023	Spring 2024	5-Spring Trend	S24 vs. S23
CA Resident	21,407	20,388	19,093	18,346	17,316		-5.6%
Non-Res Domestic	274	234	255	254	248		-2.2%
Nr International	1,061	813	789	835	826		-1.1%
Total	22,742	21,435	20,137	19,435	18,391		-5.4%

## FTES:

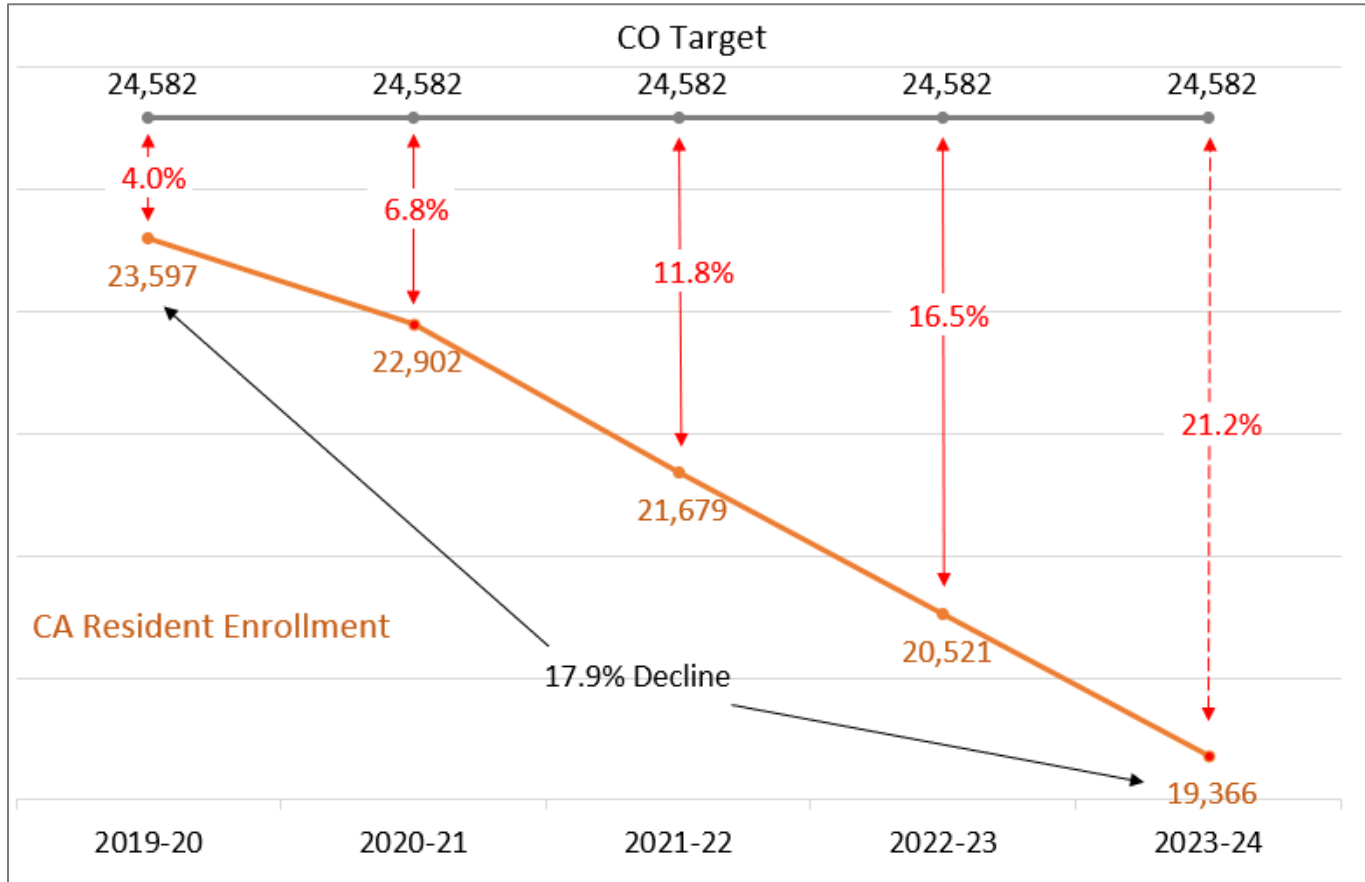
- Similar to the headcount, CA resident FTES continued declining - 5.6% declined this spring alone
- Non-CA residents and international student FTES declined of 2.2% and 1.1%, respectively.
- Total FTES declined of 5.4% this spring alone.

# Student (Major) Enrollment, by College

College	Spring 2020	Spring 2021	Spring 2022	Spring 2023	Spring 2024	5-Spring Trend	S24 vs. S23
Business	5,099	4,553	4,298	4,030	3,810		-5.5%
Education	1,440	1,749	1,597	1,501	1,297		-13.6%
Ethnic Studies	248	228	220	182	193		6.0%
Health and Social Sci	5,450	5,375	5,144	4,731	4,627		-2.2%
Liberal and Creative Arts	6,825	5,975	5,592	5,286	4,803		-9.1%
Science and Engineering	6,865	6,843	7,035	7,048	6,862		-2.6%
Undeclared and Others*	864	598	577	559	437		-21.8%
<b>Total</b>	<b>26,791</b>	<b>25,321</b>	<b>24,463</b>	<b>23,337</b>	<b>22,029</b>		<b>-5.6%</b>
<i>Changes</i>	<i>(855)</i>	<i>(1,470)</i>	<i>(858)</i>	<i>(1,126)</i>	<i>(1,308)</i>		
	-3.1%	-5.5%	-3.4%	-4.6%	-5.6%		

\* Included Undeclared, Certificates, Interdisciplinary Studies, etc.

# CA Resident Enrollment (FTEs)

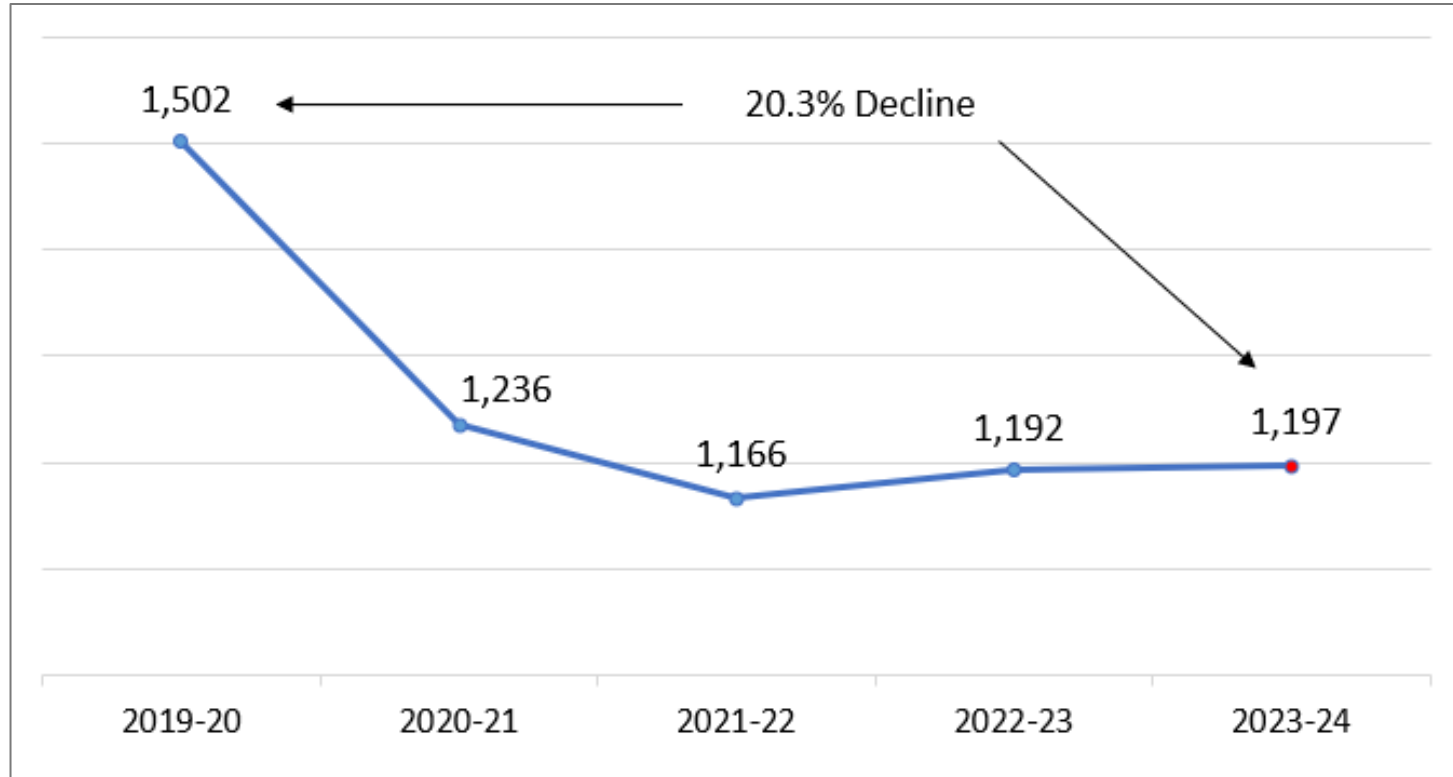


	CO Target	CA Resident FTEs	% +/- CO Res Target	% Change (Year to Year)
2019-20	24,582	23,597	-4.0%	-2.4%
2020-21	24,582	22,902	-6.8%	-2.9%
2021-22	24,582	21,679	-11.8%	-5.3%
2022-23	24,582	20,521	-16.5%	-5.3%
2023-24	24,582	19,366	-21.2%	-5.6%

- 21.2% below CO funded target for this year
- CA resident enrollment (FTEs) had dropped 5.6% for this year alone
- 17.9% decline for the last 5 years

- CO Target = Chancellor's Office assigned target for CA residents
- FTES = Full-time Equivalent Students: 1 FTES = 15 credits per semester for undergraduate students and 12 for graduate students

# Non-Resident Enrollment *(Non-resident Domestic and Internationals)*



	Non-Resident FTES	% Change (Year to Year)
2019-20	1,502	-2.1%
2020-21	1,236	-17.7%
2021-22	1,166	-5.6%
2022-23	1,192	2.2%
2023-24	1,197	0.4%

- Non-resident FTES continues to grow. This year it came in slightly better than the previous year (0.4%)

# Key Takeaways

- Total student (headcount) enrollment declined about 5.6% this spring semester. The overall headcount of 22,029 students is the smallest student body in 47 years (Spring 1977 = 22,985 Students)
- Although first-time freshmen and upper division transfers declined this semester, lower division transfers and new graduate students showed improvement
- CA resident students continued declining – Drop of 5.1% in headcount and 5.4% in FTES this spring alone. For annualized FTES, we came in at 21.2% below CO funded target for this year.
- Non-resident enrollment had improved for the last two years.
- Course sections and total seats continued declining for the last 5 spring semesters. We had significant decline in total sections this spring of 9.6%.

# Recent Recruitment and Admissions Efforts

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- 100+ college fairs
- Tabling at community events
- Partnerships with academic departments doing school visits, fairs, etc.
- Campus tours throughout the week and on Saturdays
- School and Community Based Organizations group tours and campus visit experiences
- Virtual tour upgrade- we welcome your feedback!
- Virtual info sessions and application workshops
- Earlier admission decisions and faster processing
- Regional admitted student receptions
- Support in the roll-out of this year's FAFSA/CADAA applications
- Incentives for May 15 Accepted Admission Offers
- Calling Campaign to admitted students and EXPLORE SF STATE – April 20!



# Fall 2023 to Spring 2024 Retention

One Semester Stop-out: Beginning Semester = Fall 2023 | Returning Semester = Spring 2024

		Fall 2023			Spring 2024			
		# F23 Students	# F23 Graduated	% F23 Graduation	# S24 Returning	% S24 Returning	# S24 Stop-Out	% S24 Stop-out
New	1st Freshmen	2,758	0	0.0%	2,525	91.6%	233	8.4%
	UG Transfers	2,449	0	0.0%	2,273	92.8%	176	7.2%
	New PBac	94	0	0.0%	86	91.5%	8	8.5%
	1st Graduates	883	1	0.1%	840	95.1%	42	4.8%
Continuing	Freshmen	1,281	0	0.0%	1,040	81.2%	241	18.8%
	Sophomores	2,768	0	0.0%	2,559	92.4%	209	7.6%
	Juniors	3,485	17	0.5%	3,182	91.3%	286	8.2%
	Seniors	6,736	1,741	25.8%	4,897	72.7%	393	5.8%
	2nd/Post Bac	159	21	13.2%	88	55.3%	52	32.7%
	Graduates	1,861	198	10.6%	1,479	79.5%	190	10.2%
Total		22,474	1,978	8.8%	18,969	84.4%	1,830	8.1%

- Majority of stopped-outs were continuing juniors (n=286) and seniors (n=393).
- 233 (8.4%) first-time freshmen and 176 (7.2%) new UG transfers were stopped-out.
- About 190 (or 10.2%) of continuing graduates did not return

\* Excluded Transitory Students and Undeclared Students

# Fall 2023 to Spring 2024 Retention

College	Total		
	#F23	#SO	%SO
Business	3,969	293	7%
Education	891	120	14%
Ethnic Studies	192	14	7%
Health and Social Sci	4,925	411	8%
Liberal and Creative Arts	5,142	448	9%
Science and Engineering	7,355	544	7%
<b>Total</b>	<b>22,474</b>	<b>1,830</b>	<b>8%</b>

#F23 = # Students who enrolled in Fall 2023  
 SO = Spring 2024 Stopped-outs

College	New Students											
	1st Freshmen			UG Transfers			New PBac			1st Graduates		
	#F23	#SO	%SO	#F23	#SO	%SO	#F23	#SO	%SO	#F23	#SO	%SO
Business	464	37	8%	461	32	7%	9	2	22%	71	1	1%
Education	7	-	0%	18	1	6%	62	4	7%	205	12	6%
Ethnic Studies	15	2	13%	19	1	5%	2	1	50%	15	-	0%
Health and Social Sci	697	72	10%	510	38	8%	6	-	0%	169	4	2%
Liberal and Creative Arts	524	34	7%	659	56	9%	11	-	0%	194	18	9%
Science and Engineering	1,051	88	8%	782	48	6%	4	1	25%	229	7	3%
<b>Total</b>	<b>2,758</b>	<b>233</b>	<b>8%</b>	<b>2,449</b>	<b>176</b>	<b>7%</b>	<b>94</b>	<b>8</b>	<b>9%</b>	<b>883</b>	<b>42</b>	<b>5%</b>

College	Continuing Students																	
	Freshmen			Sophomores			Juniors			Seniors			2nd/Post Bac			Graduates		
	#F23	#SO	%SO	#F23	#SO	%SO	#F23	#SO	%SO	#F23	#SO	%SO	#F23	#SO	%SO	#F23	#SO	%SO
Business	238	41	17%	550	44	8%	638	38	6%	1,390	91	7%	3	-	0%	145	7	5%
Education	6	4	67%	13	-	0%	21	-	0%	29	2	7%	98	40	41%	432	57	13%
Ethnic Studies	8	1	13%	23	1	4%	35	-	0%	59	4	7%				16	4	25%
Health and Social Sci	284	50	18%	613	48	8%	828	104	13%	1,273	73	6%	36	8	22%	509	14	3%
Liberal and Creative Arts	239	44	18%	573	51	9%	898	76	9%	1,632	106	7%	10	2	20%	402	61	15%
Science and Engineering	506	101	20%	996	65	7%	1,065	68	6%	2,353	117	5%	12	2	17%	357	47	13%
<b>Total</b>	<b>1,281</b>	<b>241</b>	<b>19%</b>	<b>2,768</b>	<b>209</b>	<b>8%</b>	<b>3,485</b>	<b>286</b>	<b>8%</b>	<b>6,736</b>	<b>393</b>	<b>6%</b>	<b>159</b>	<b>52</b>	<b>33%</b>	<b>1,861</b>	<b>190</b>	<b>10%</b>

## Top 10 degree programs for Spring 2024 Stopped-outs

College	Department	Program	Continuing Students								
			Total			Juniors			Seniors		
			#F23	#SO	%SO	#F23	#SO	%SO	#F23	#SO	%SO
SC/EN	Computer Science	Computer Sci -BS	1,759	118	7%	280	19	7%	648	34	5%
SC/EN	Psychology	Psychology -BA	1,476	92	6%	275	14	5%	467	19	4%
BUS	Marketing	Bus Admin-Marketing -BS	828	64	8%	154	5	3%	282	21	7%
HSS	Criminal Justice Studies	Criminal Justice Studies -BA	590	64	11%	105	11	11%	168	10	6%
BUS	All College	Bus Admin-General Bus -BS	664	58	9%	97	10	10%	221	17	8%
LCA	School of Cinema	Cinema -BA	707	55	8%	142	12	9%	244	17	7%
BUS	Management	Bus Admin-Management -BS	521	46	9%	97	5	5%	185	9	5%
LCA	Communication Studies	Communication Studies -BA	498	43	9%	111	10	9%	215	17	8%
SC/EN	Engineering	Mechanical Engineering -BS	419	43	10%	33	3	9%	152	5	3%
HSS	Sociology	Sociology -BA	406	39	10%	87	8	9%	155	11	7%

# Recent Retention Efforts

- New Stupski Foundation grant of \$2.5 million to focus on sophomore retention
- Faculty resource – Collectively Closing the Equity Gap [document](#)
- Undergraduate Advising Center lower division team now have assigned students for their first and second years
- New [College Corps](#) grant (2 more years) of \$2.1 for 65 students (at least 10 reserved for AB 540 students) to earn a total of \$10,000 for 450 hours of community service
- Housing for any continuing students who applies
- Updated communication procedures about financial holds
- Changes being made this summer will results in 1400 additional hours for student appointments in CAPS; offering variety of types of appointments
- [Overview](#) of retention efforts over the last few years

**Thank you!**

**Questions?**



**Budget Update**  
Jeff Wilson

San Francisco State University  
Administration & Finance

1. State Budget Status
2. Scenarios for Review

1. State Budget Status
2. Scenarios for Review

- Currently in “Hearing Season” when senate and assembly budget committees hold hearings about the budget in the context of the Governor’s January proposal and the Legislative Analyst Office (LAO)
- Senate issued “**Step One: Shrink the Shortfall**” on March 14; co-authored by Sen. Mike McGuire, President pro Tempore of the Senate, and Senator Scott Weiner, Chair, Committee on Budget and Fiscal Review. Regarding the CSU:  
*“Approves Governor’s proposal to defer \$240.2 million General Fund one-time. The deferral would maintain ongoing CSU at 2023-24 levels and enable CSU to pursue various interim financing to support the planned 2024-25 base support.”*
- Next Update: Governor’s May Revision (typically, first couple of weeks in May)



# Agenda

1. State Budget Status
2. Scenarios for Review

# ASSUMPTIONS & CONDITIONS (FEBURARY 2024)

Scenario	Tuition Revenue	State Appropriation	Compensation Adjustments	Operating Costs	Multi-Year Reductions
<b>December 2022 (ORIGINAL PLAN)</b>	No increase; 14% below target; minimal growth	Compact holds; 5% reallocation plan	None. If any, fully funded by state/CSU.	Costs grow by 3% per year.	Reduce costs by 3% per year for five years
<b>February 2024</b>	6% increase beginning for Fall 2024 (continuing for 2025-26 and 2026-27); enrollment <i>continues to decline</i> from 20,566 FTES in 2023-24 to 18,419 FTES in 2026-27.	Compact holds; CSU reallocates (reduces) SF State funding by 3%; assume Governor's commitments in January proposal related to deferred funding will hold.	5% salary increases for all employees (+ related benefits costs); additional costs per various CBAs (e.g., raising minimum starting salaries for specific faculty ranges); CSU <i>only partially</i> funds these additional costs.	Costs grow by 3%. Known increases above 3% (e.g., utilities) are also included.	<b><u>For 2024-25 reduce costs by 5%</u></b> ; for 2025-26 and 2026-27, reduce costs by 3%.

# PLANNING SCENARIO - February 2024

(in millions)

	FY 2024 - 2025	FY 2025 - 2026	FY 2026 - 2027
Total Resources	\$356.7	\$364.6	\$365.5
Total Expenditures	<u>379.5</u>	<u>386.5</u>	<u>377.2</u>
Operating Surplus (Deficit)	(\$22.8)	(\$21.9)	(\$11.7)
Other One-Time Funds	22.8	21.9	11.7
Surplus (Deficit)	\$0.0	\$0.0	\$0.0

# PLANNING SCENARIO - February 2024

(in millions)

	<u>Prior FY 2024 – 2025</u> Salaries + Wages Reduction (@ 3%)	<u>Additional FY 2024 – 2025</u> Salaries + Wages Reduction (@ 5%)	<u>Updated FY 2024 – 2025</u> Salaries + Wages Reduction (@5 %)
Academic Affairs	-\$5.00	-\$3.24	-\$8.24
Administration & Finance	-0.90	-0.58	-1.48
Office of the President	-0.04	-0.03	-0.07
Student Affairs/Enrollment Mgt	-0.60	-0.39	-0.99
University Advancement	-0.20	-0.13	-0.33
University Enterprises	-0.06	-0.04	-0.10
<b>Total</b>	<b>-\$6.70</b>	<b>-\$4.40</b>	<b>-\$11.10</b>

# PLANNING SCENARIO - February 2024

in millions

	FY 2024 - 2025	FY 2025 - 2026	FY 2026 - 2027
Central Reserve – Beginning Balance	\$9.0	\$0.0	\$0.0
Use to Cover Deficit	<u>22.8</u>	<u>21.9</u>	<u>11.7</u>
Central Reserve – Ending Balance	(\$13.8)	(\$21.9)	(\$11.7)
Other One-Time Funds (to discuss)	13.8	21.9	11.7
Surplus (Deficit)	\$0.0	\$0.0	\$0.0

# OTHER ONE-TIME FUNDS

1. Undesignated Carryforward = carryforward balances with no documented designation
2. Designated Carryforward = carryforward with a designation but not legally or contractually restricted
3. VSIP Savings = planned salary and benefits savings from VSIP
4. In-Year Savings = savings from vacant positions, delaying operating expenses, reduced travel and hospitality (i.e., cost cutting)

# PLANNING SCENARIO - February 2024

in millions

	FY 2024 - 2025	FY 2025 - 2026	FY 2026 - 2027
Other One-Time Funds	\$13.8	\$21.9	\$11.7
Undesignated Carryforward	3.0	6.0	3.0
Reallocation of Designated Carryforward	2.0	4.0	2.0
VSIP Savings	6.7	6.7	6.7
In-Year Savings	<u>2.1</u>	<u>5.2</u>	<u>0.0</u>
Total One-Time Funds	\$13.8	\$21.9	\$11.7

# Critical Assumptions & Conditions

- Tuition revenue based on enrollments, including retention
  - Tuition increase
  - Enrollment forecasts
- State appropriation
  - State's ongoing support for the CSU (the compact)
  - Chancellor's Reallocation Plan
- Compensation adjustments
  - Funded (by allocation of State appropriation from the CSU)
  - Unfunded (no allocation from CSU)
- Operating costs increases
  - e.g., Utilities, Insurance



# PLANNING SCENARIO – NO 24-25 COMPACT

(in millions)

	FY 2024 - 2025	FY 2025 - 2026	FY 2026 - 2027
Total Resources	\$352.6	\$360.5	\$361.4
Total Expenditures	<u>379.5</u>	<u>386.5</u>	<u>377.2</u>
Operating Surplus (Deficit)	(\$26.9)	(\$26.0)	(\$15.8)
Other One-Time Funds	26.9	26.0	15.8
Surplus (Deficit)	\$0.0	\$0.0	\$0.0

# PLANNING SCENARIO – NO 24-25 COMPACT

in millions

	FY 2024 - 2025	FY 2025 - 2026	FY 2026 - 2027
Central Reserve – Beginning Balance	\$9.0	\$0.0	\$0.0
Use to Cover Deficit	<u>26.9</u>	<u>26.0</u>	<u>15.8</u>
Central Reserve – Ending Balance	(\$17.9)	(\$26.0)	(\$15.8)
Other One-Time Funds (to discuss)	17.9	26.0	15.8
Surplus (Deficit)	\$0.0	\$0.0	\$0.0

# PLANNING SCENARIO – NO 24-25 COMPACT

in millions

	FY 2024 - 2025	FY 2025 - 2026	FY 2026 - 2027
Other One-Time Funds	\$17.9	\$26.0	\$15.8
Undesignated Carryforward	4.5	7.5	4.5
Reallocation of Designated Carryforward	3.5	5.5	3.5
VSIP Savings	6.7	6.7	6.7
In-Year Savings	<u>3.2</u>	<u>6.3</u>	<u>1.1</u>
Total One-Time Funds	\$17.9	\$26.0	\$15.8

**Thank you.**

**Questions?**

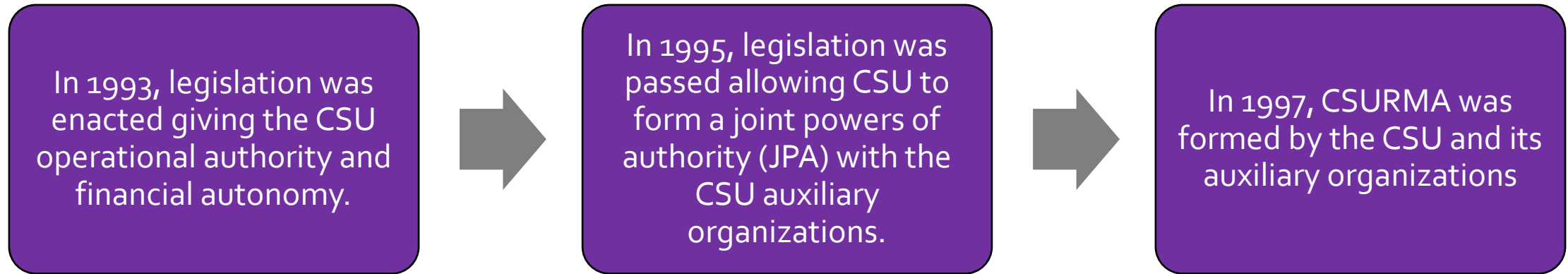
**5 Minute Break**



# Insurance Program

Costs, Successes & Challenges

San Francisco State University  
Administration & Finance



**CSURMA was formed to provide broad, manuscripted coverage while ensuring long-term budget stability. Campuses share risk with other campuses. Auxiliary organizations share risks with other auxiliary organizations.**

## Core Programs

- Workers' Comp
- Property
- Liability

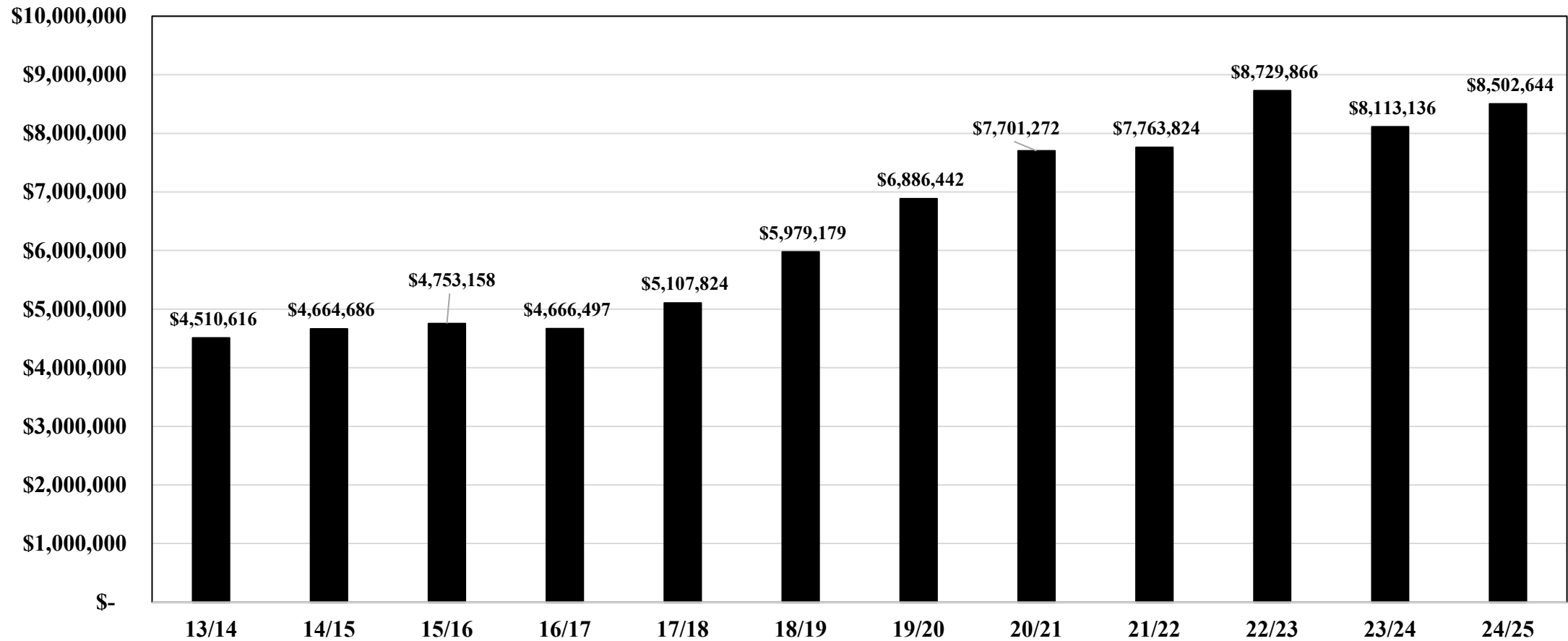
## Other Primary Programs

- Auto Liability
- IDL/NDI/UI (unemployment)
- Athletic Injury Medical Expense

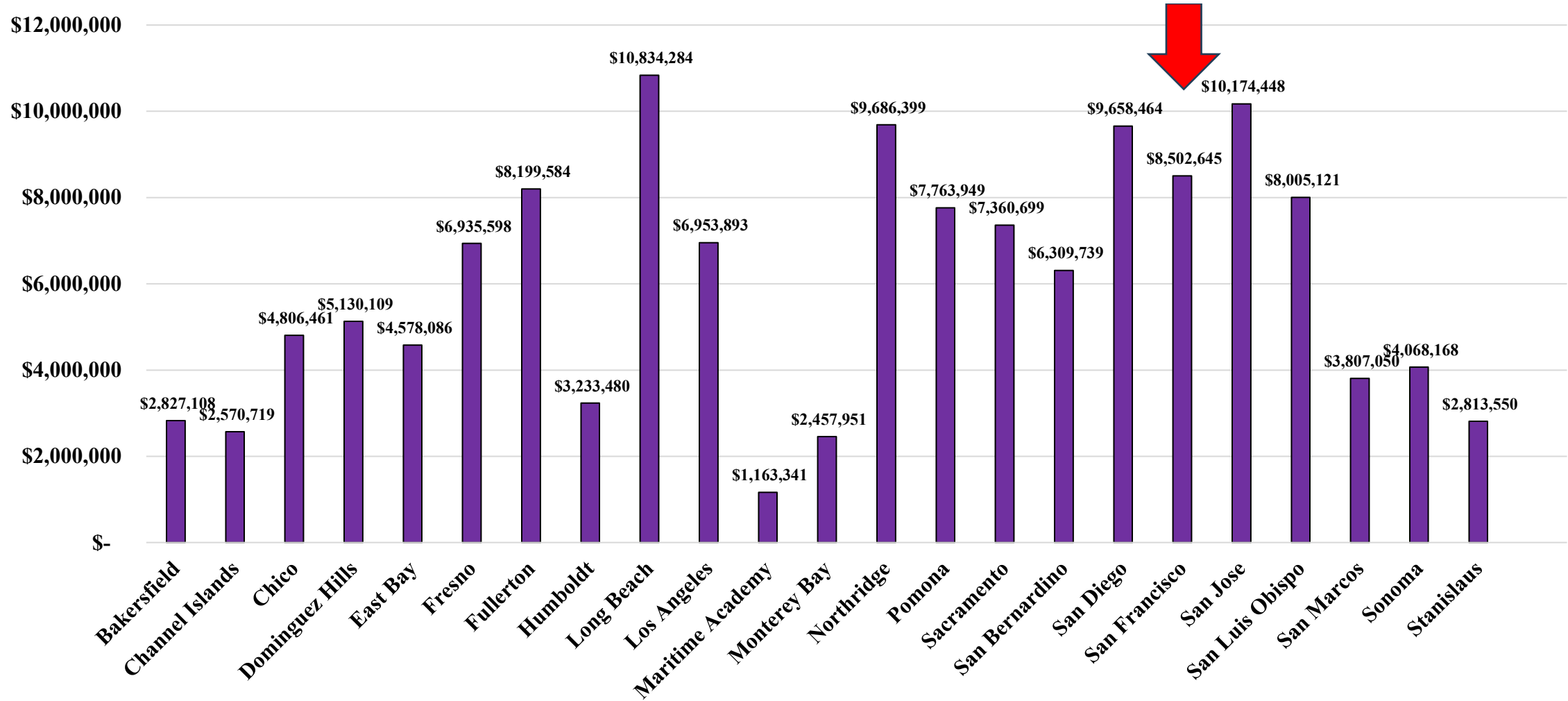


- Builder's Risk
- Club Liability
- Club Sports
- Drones/UAVs
- Earthquake Parametric
- Fidelity/Crime
- Fine Arts, Artifacts and Archives
- Foreign Travel
- Medical Malpractice
- Owner Controlled Insurance
- Pollution Liability
- Rocketry
- Student Professional Liability
- Student Academic Field Experience Liability
- Student Travel Accident

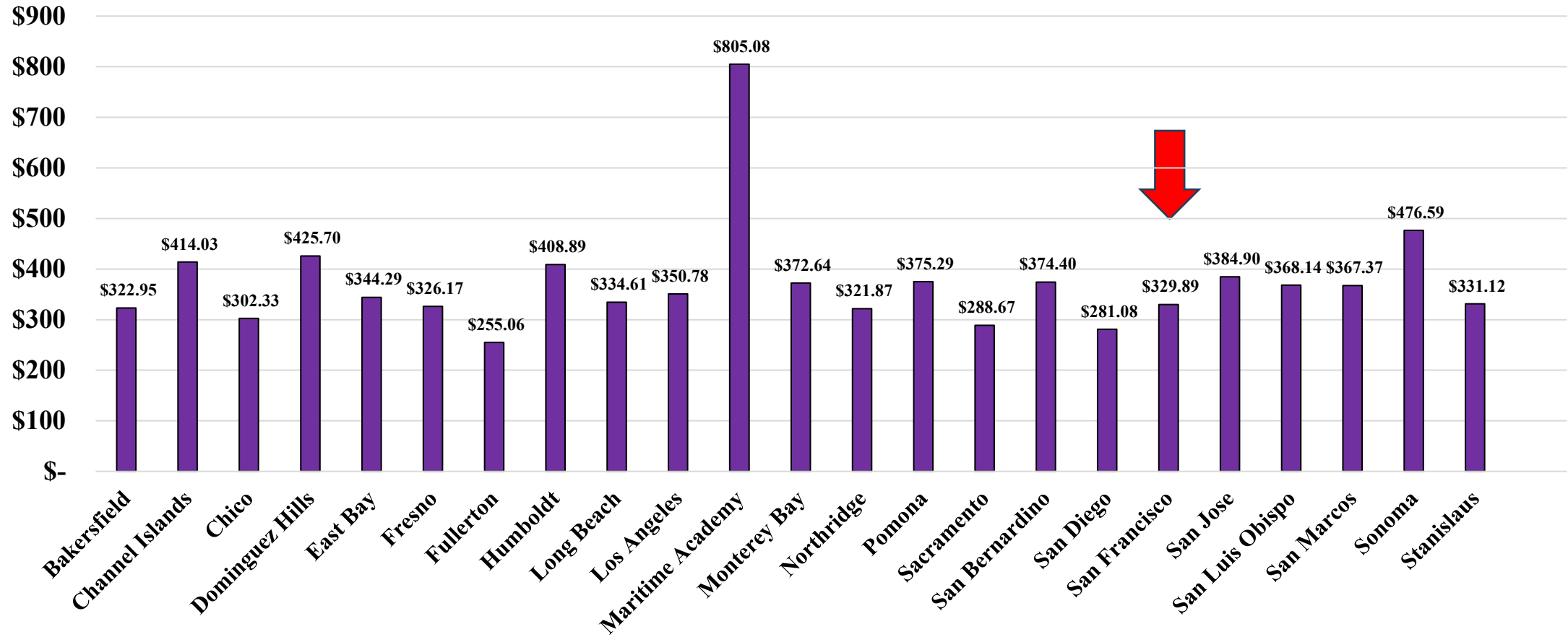
# SFSU Annual CSURMA Costs Primary Programs



# FY24/25 CSURMA Primary Costs Campus by Campus



# FY24/25 CSURMA Cost/FTE Campus by Campus



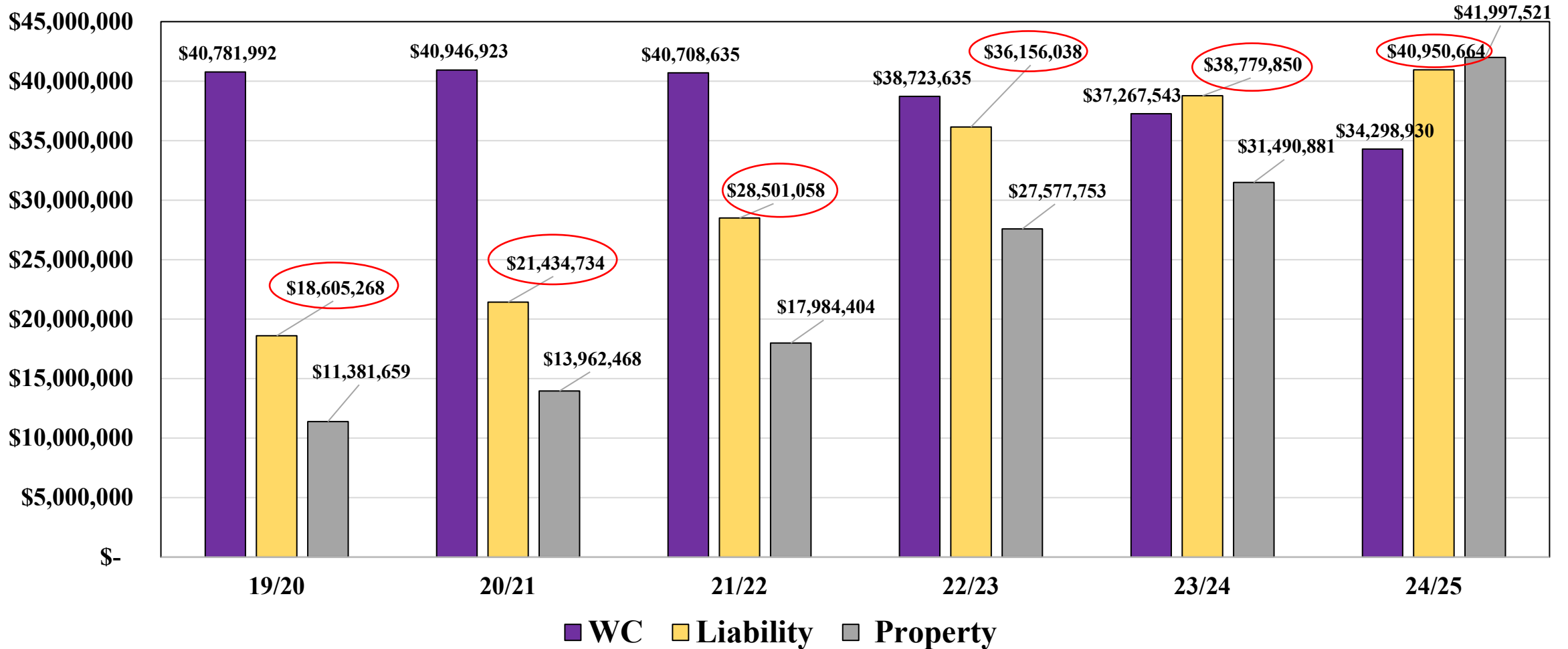
## **Core Programs**

- Workers' Comp
- Property
- Liability

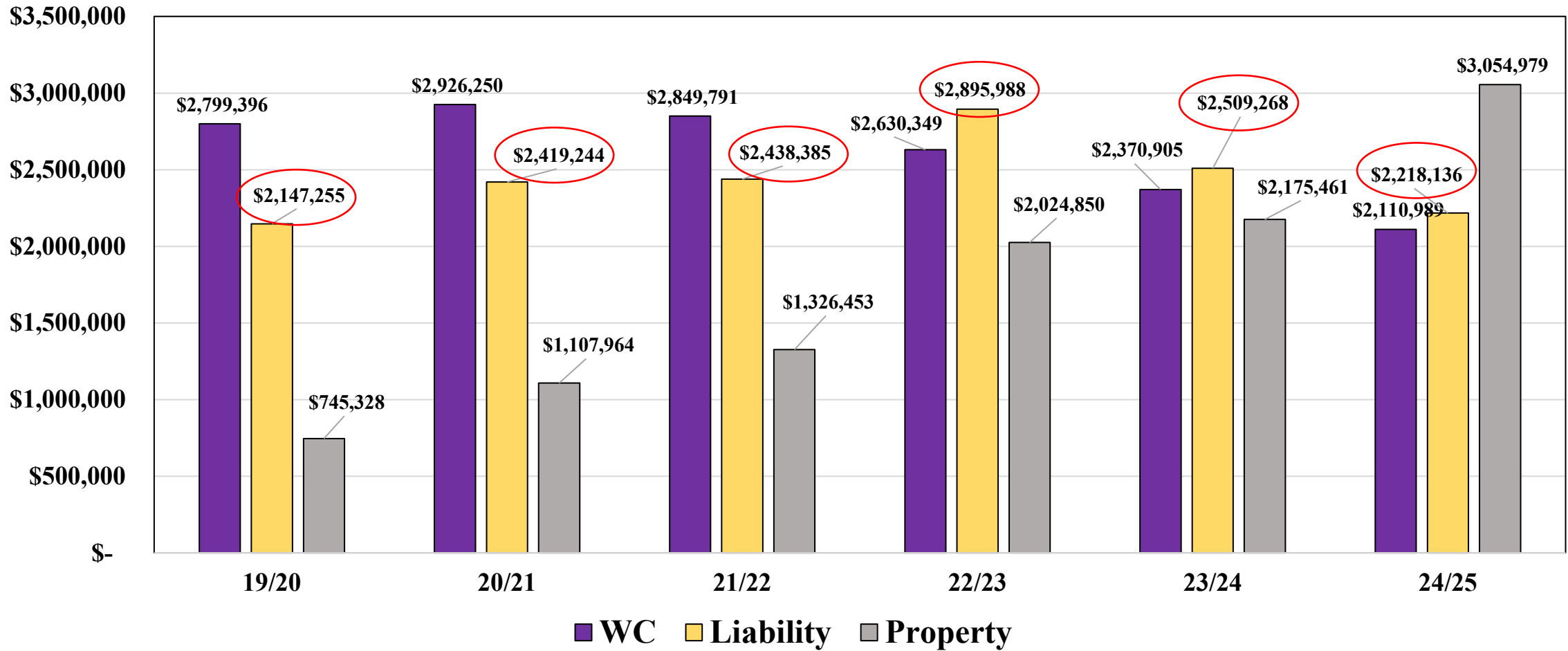
## **Other Coverage Programs**

- Auto Liability
- IDL/NDI/UI (unemployment)
- Athletic Injury Medical Expense

# Systemwide Premiums Core Programs by Line of Coverage



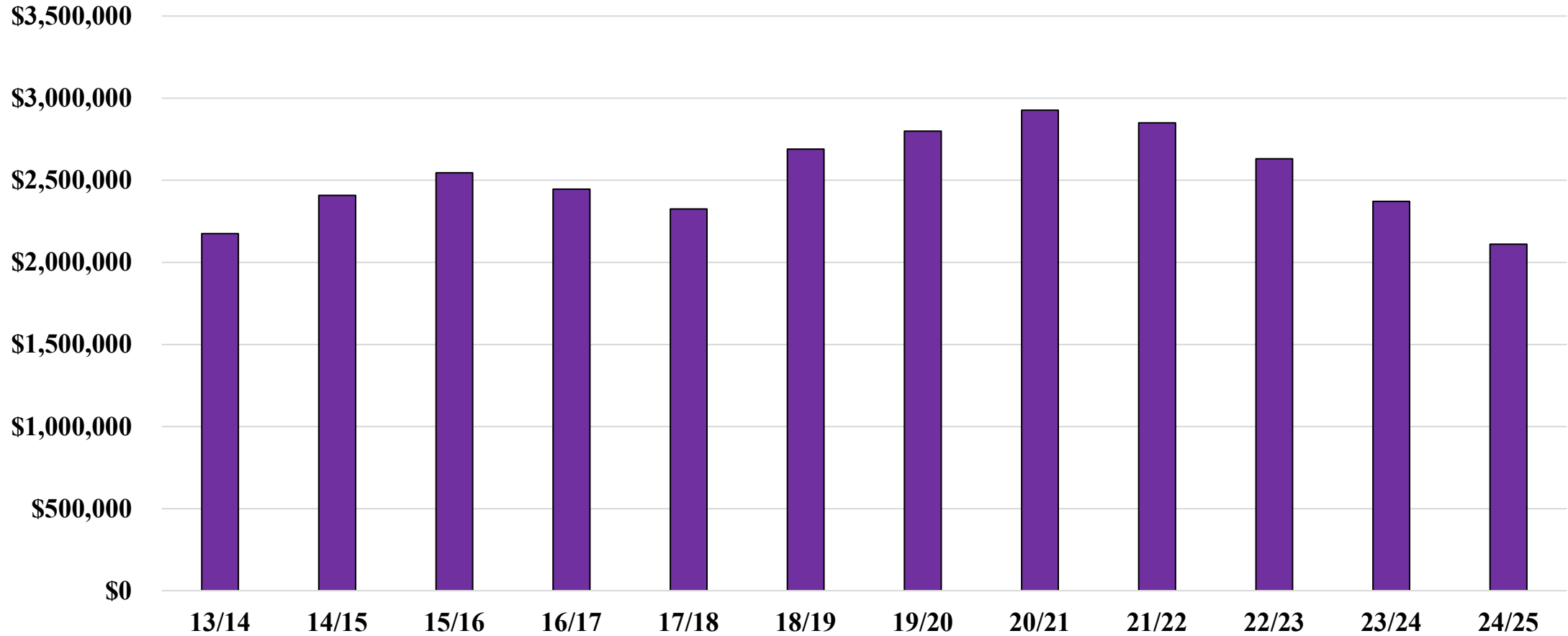
# SFSU Premiums Core Programs by Line of Coverage



# The Successes



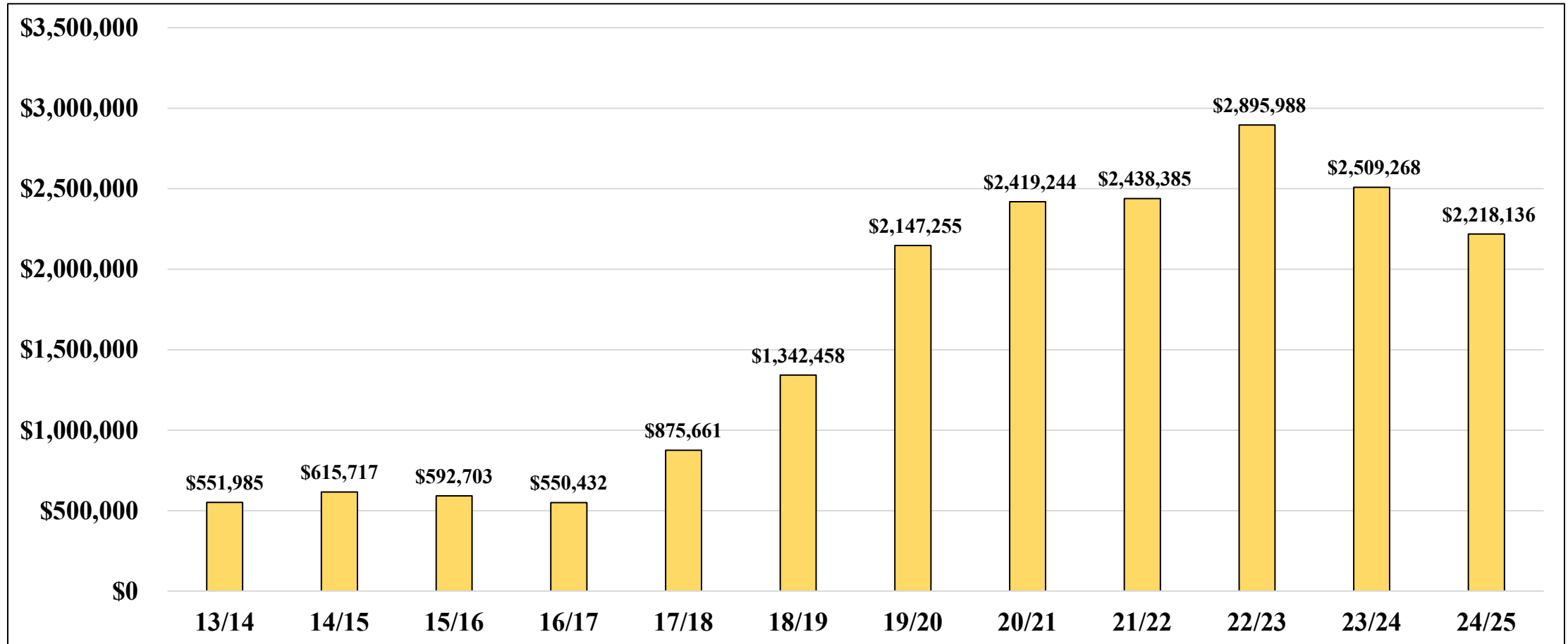
# SFSU WC Program Historical Costs



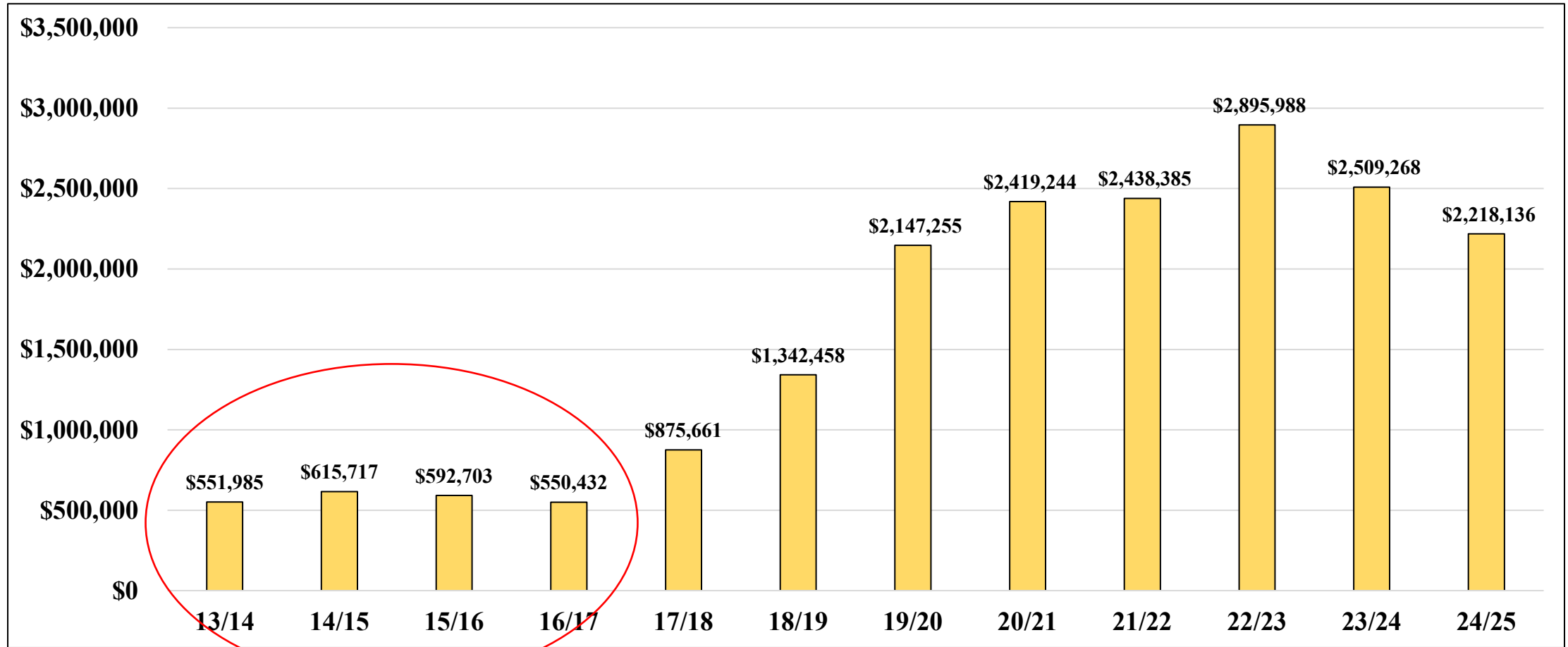
2015	\$3,461,497
2016	\$8,111,485
2017	\$3,722,665
2018	\$3,647,367
2019	\$7,219,917
2020	\$9,749,679
2021	\$10,621,846
2022	\$7,445,298
2023	\$4,799,851

- Over \$58 million returned to campuses since 2015.

# SFSU Liability Program Historical Costs



# SFSU Liability Program Historical Costs



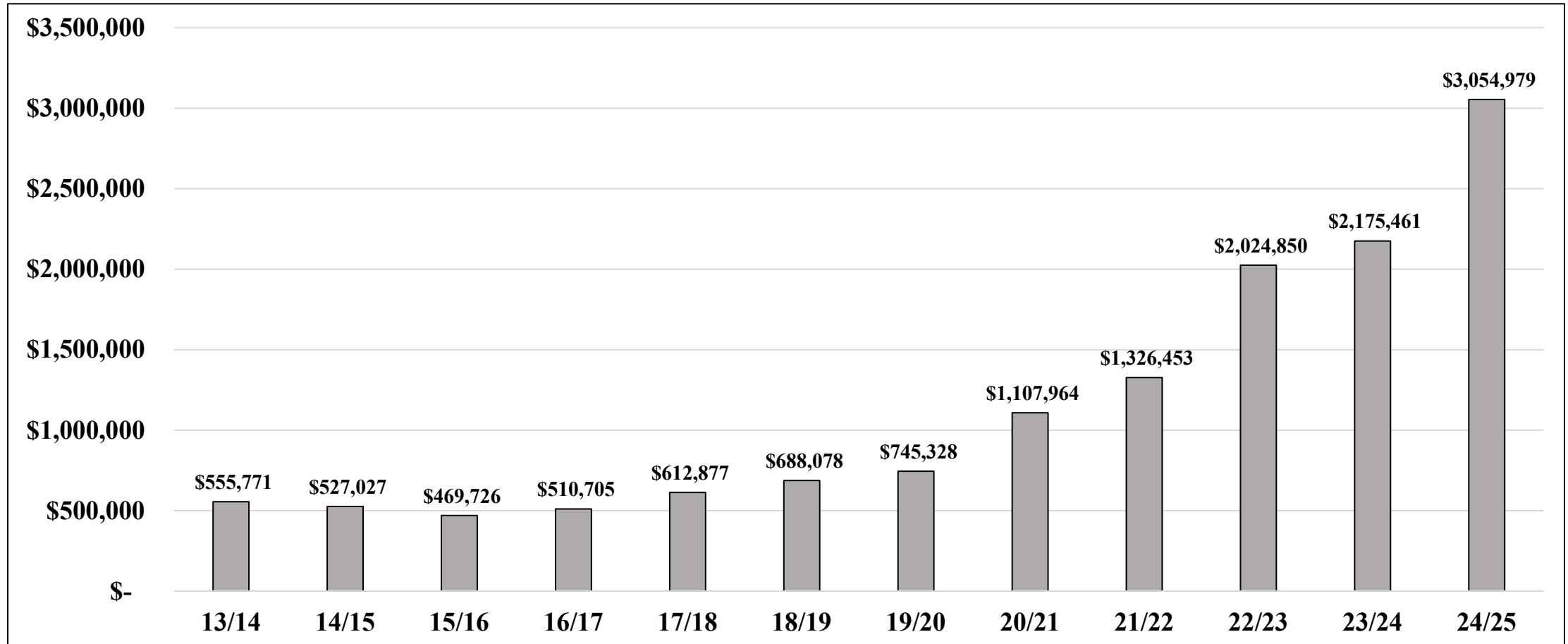
# Liability Program "Ratable" Claims

A			B	C	D	E	F	G
Ex-Mod:			233%	242%	224%	174%	96%	
<i>FISCAL YEAR</i>	<i>CAMPUS DEDUCTIBLE</i>	<i>ACTUAL CLAIM AMOUNTS PAID</i>	"CAPPED" CLAIM AMOUNTS USED FOR FY 20/21 RATING	"CAPPED" CLAIM AMOUNTS USED FOR FY 21/22 RATING	"CAPPED" CLAIM AMOUNTS USED FOR FY 22/23 RATING	"CAPPED" CLAIM AMOUNTS USED FOR FY 23/24 RATING	"CAPPED" CLAIM AMOUNTS USED FOR FY 24/25 RATING	"CAPPED" CLAIM AMOUNTS USED FOR FY 25/26 RATING
12/13	\$ 250,000	\$ 227,323	\$ 101,787	\$ 101,787	\$ 101,787			
13/14	\$ 500,000	\$ 250,077	\$ 143,046	\$ 143,046	\$ 143,046			
14/15	\$ 500,000	\$ 186,960	\$ 24,908	\$ 24,908	\$ 24,908			
15/16	\$ 500,000	\$ 478,546	\$ 355,727	\$ 355,727	\$ 355,727			
16/17	\$ 250,000	\$ 1,803,789	\$ 1,248,118	\$ 1,248,118	\$ 1,248,118			
17/18	\$ 250,000	\$ 2,600,778	\$ 1,569,362	\$ 1,569,362	\$ 1,569,362	\$ 1,569,362		
18/19	\$ 250,000	\$ 1,010,521	\$ 964,546	\$ 964,546	\$ 964,546	\$ 964,546	\$ 964,546	
19/20	\$ 500,000	\$ 1,478,080		\$ 294,944	\$ 294,944	\$ 294,944	\$ 294,944	\$ 294,944
20/21	\$ 500,000	\$ 1,028,012			\$ 240,570	\$ 240,570	\$ 240,570	\$ 240,570
21/22	\$ 500,000	\$ 1,668,799				\$ 284,841	\$ 284,841	\$ 284,841
22/23	\$ 750,000	\$ -					\$ -	\$ -
23/24	\$ 750,000	\$ 90,277						\$ 49
<b>Total</b>		<b>\$ 10,732,885</b>	<b>\$ 4,162,661</b>	<b>\$ 4,432,697</b>	<b>\$ 4,317,540</b>	<b>\$ 3,354,263</b>	<b>\$ 1,784,901</b>	<b>\$ 820,404</b>
		<b>Premium:</b>	\$ 2,419,244	\$ 2,438,385	\$ 2,895,988	\$ 2,509,268	\$ 2,218,136	TBD

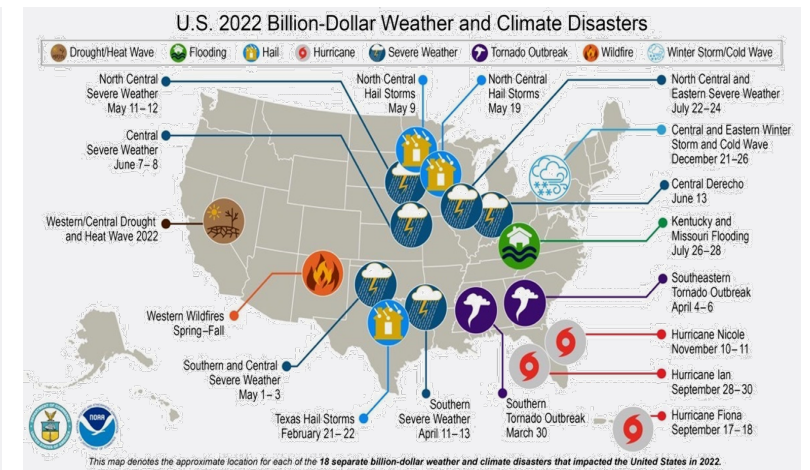
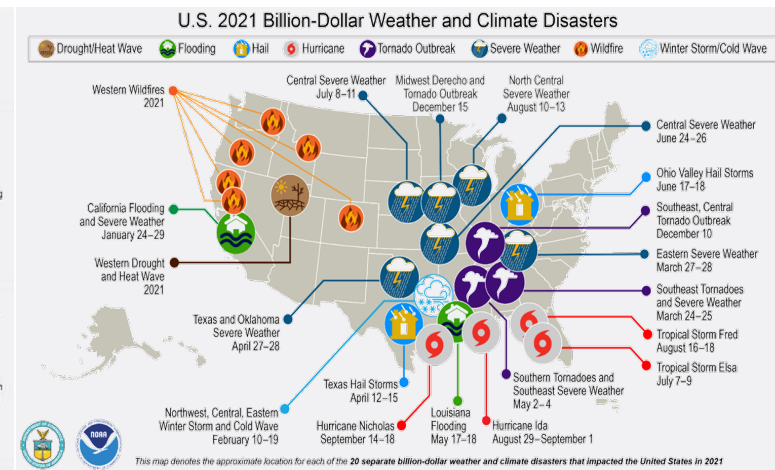
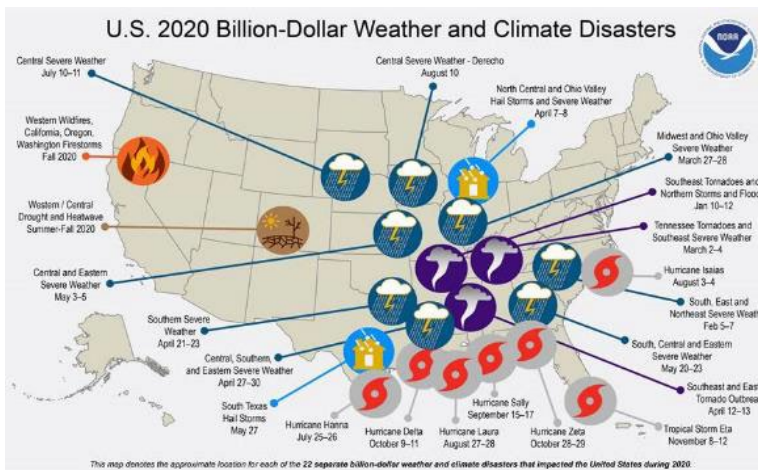
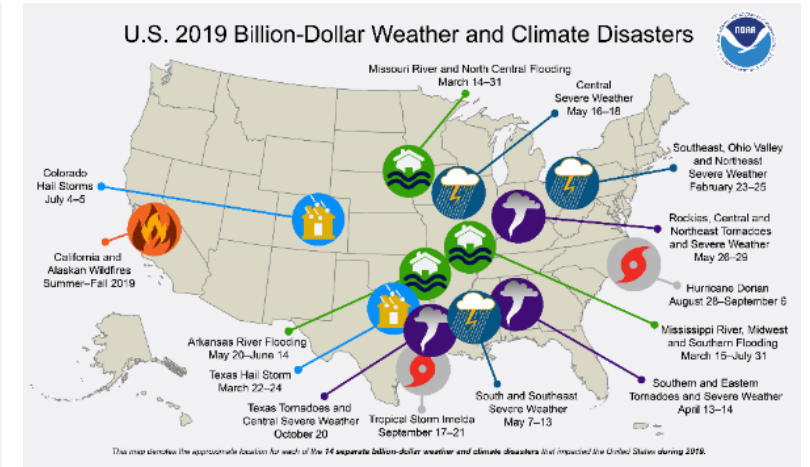
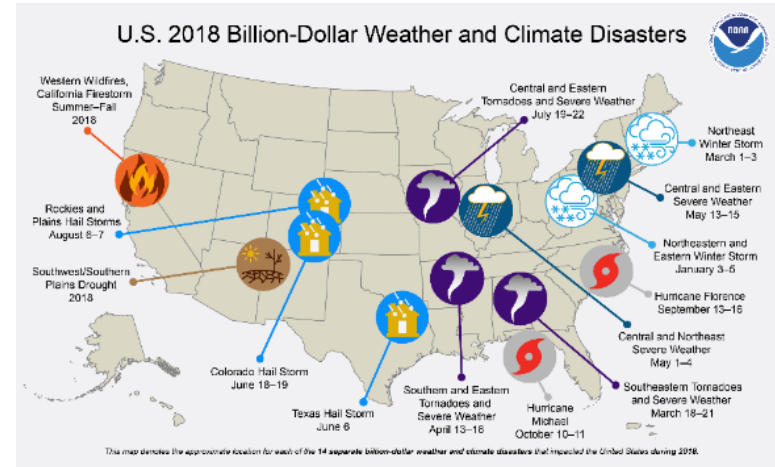
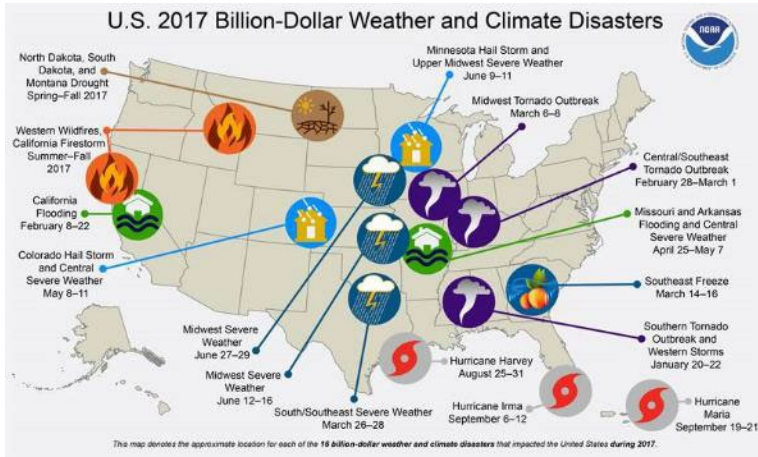
# The Challenges

## CSURMA Property Program

# SFSU Property Historical Costs



# Six-year CAT History





# CSURMA Property Losses FY18/19 to Present

Date of Loss	Description of Loss	Location	Amount Incurred
FY2018/19	Flood/Water Damage due to Heavy Rains	Chico	\$5,670,081
FY2019/20	Wildfire	Vallejo	1,765,918
	Master Key Loss - Contractor	San Francisco	734,057
	Master Key Theft	San Francisco	1,200,000
FY2020/21	Wildfire – Swanton Ranch	Davenport	34,100,000
	Water Damage	San Jose	1,361,170
	Water Damage	Turlock	1,538,195
FY2021/22	Flood/Water Damage due to Heavy Rains	San Luis Obispo	18,000,000
FY2022/23	Flood/Runoff of Surface Waters	San Bernardino	3,050,000
	Flood/Runoff of Surface Waters	San Bernardino	26,600,000

# SFSU Property Losses FY16/17 to Present

Fiscal Year	Description	Amount Incurred
FY2016/17	Student Grease Fire	\$281,329
FY2017/18	Fire	430,699
	Water Damage	252,612
	Running track tree root impaction	398,927
FY2018/19	None	
FY2019/20	Water Damage – Fire Main Break	100,462
	Water Damage – Pipe Burst	150,504
	Master Key Loss	734,057
	Master Key Theft	1,200,000
FY2020/21	None	
FY2021/22	Water Damage	301,486
FY2022/23	Water Damage	208,693
	Electrical Power Surge	828,294
		<b>\$4,718,708</b>

- Ex-mod implemented for 23/24
- Campus flood deductible has already been increased for two “frequent flyer” campuses
- Coverage limits may be reduced to garner savings leading to greater financial risk to campuses.

# What Can You Do To Help?

- If you see something, say something.
- Ask for help or guidance.
- Don't leave laptops unattended, especially in your car.
- Don't carry around campus master keys unless absolutely necessary and only for as long as needed.
- Close your office windows when rain is imminent or when leaving for an extended time

# Questions?



# Contact Us at:

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## Enterprise Risk Management

San Francisco State University  
1600 Holloway Avenue, ADM 258  
San Francisco, CA 94132



## Phone

(415) 338-1124



## Email / Website

[mbeatty@sfsu.edu](mailto:mbeatty@sfsu.edu)

[www.erm.sfsu.edu](http://www.erm.sfsu.edu)

# Indirect Cost Policy Proposal

## First Reading

March 21, 2024

Audrey Gavino Parangan-Smith, Co-Director, SF Build

Crystal Kam, Director of Budget & Finance, College of Science & Engineering

Gretchen LeBuhn, Professor of Biology, College of Science and Engineering

Tiffany O'Shaughnessy, Associate Professor of Counseling, College of Health & Social Sciences

John Kim, Interim AVP of Academic Resources

Michael Scott, AVP for the Office of Research and Sponsored Programs

Eugene Sivadas, Dean, Lam Family College of Business



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STATE UNIVERSITY



# IDC Explained

Sponsored projects have direct and indirect costs.

**Direct costs** are specifically and uniquely attributed to and billed to a particular project or activity and are allowable under the sponsoring organizations' guidelines.

**Indirect costs** are charged to a funder to cover the expenses associated with the facilities and administrative support for a sponsored activity.





# Proposed IDC Distribution Policies

I. Academic Resources shall return 25% of IDC to the college where the grant is generated.

The remaining 75% of IDC remain in General Fund and are used to pay for financial commitments including Administration and Finance expenses, ORSP operating costs, start-up packages for new faculty hires in COSE, operating costs of the Romberg Tiburon Campus and the Estuary and Ocean Science Center.

If the fixed costs exceed 75% of total IDC generated, the amount returned to colleges will be pro-rated in subsequent years.

II. Academic resources and ORSP will consult with the University Research, Scholarship, and Creative Activities Council of the Academic Senate before agreeing to new financial commitments.



# IDC Distribution Policies

- ORSP shall create a reserve fund equivalent to 20 percent of IDC generated to better weather variations in grant activity.
- Funds from this reserve will be controlled by the AVP of Research and Sponsored Programs and may only be spent to support the research mission of the University.
- If the reserve fund exceeds the 20 percent threshold, a committee shall be appointed by the Provost or designee to examine how best to utilize the excess reserves.



**Each College shall publish a clear policy for how IDC is shared back to the Department.**

**At present, the College policies are:**

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STATE UNIVERSITY**



<b>College</b>	<b>College Split Policy</b>	<b>Comments</b>
<b>LCA</b>	College retains 100% IDC	Uses it to offset research expenses for new faculty and support faculty research. It also gives up IDC to cost-share in low-IDC grants.
<b>GCOE</b>	College retains 25 percent and gives 75 percent to the Department	Departments may give it back to the faculty.
<b>CHSS</b>	College retains 25 percent and gives 75 percent to the Department	
<b>COSE</b>	College and Department split 50-50.	In the Dean's Office, we use it to support faculty start-up packages and address equipment and infrastructure problems. The departments use these funds at their discretion but mainly support research efforts.
<b>LFCoB</b>	College gives 100% to the Department.	Minimal grant-seeking activity. Very small amounts are generated in IDC.
<b>COES</b>	College retains 100% IDC.	Only small amounts are generated in IDC and used it for faculty professional development.



- Colleges must detail their IDC sharing policies with Departments and the use of retained funds.
- Departments receiving IDC allocations must outline their distribution methods, whether keeping, sharing with PIs, or other approaches.
- IDC fund distribution should undergo annual faculty reviews in Colleges and Departments, ensuring necessary grant project costs are covered and expected University support for these projects is maintained.



# PI Share

While the policy does not mandate a set percent of IDC go back to the PI, we strongly recommend that departments incentivize PIs by sharing a suitable and appropriate amount of IDC with the PI.

Departments shall craft a policy on PI share, and ensure that all current and new PIs are aware of the policy.



1

2

3

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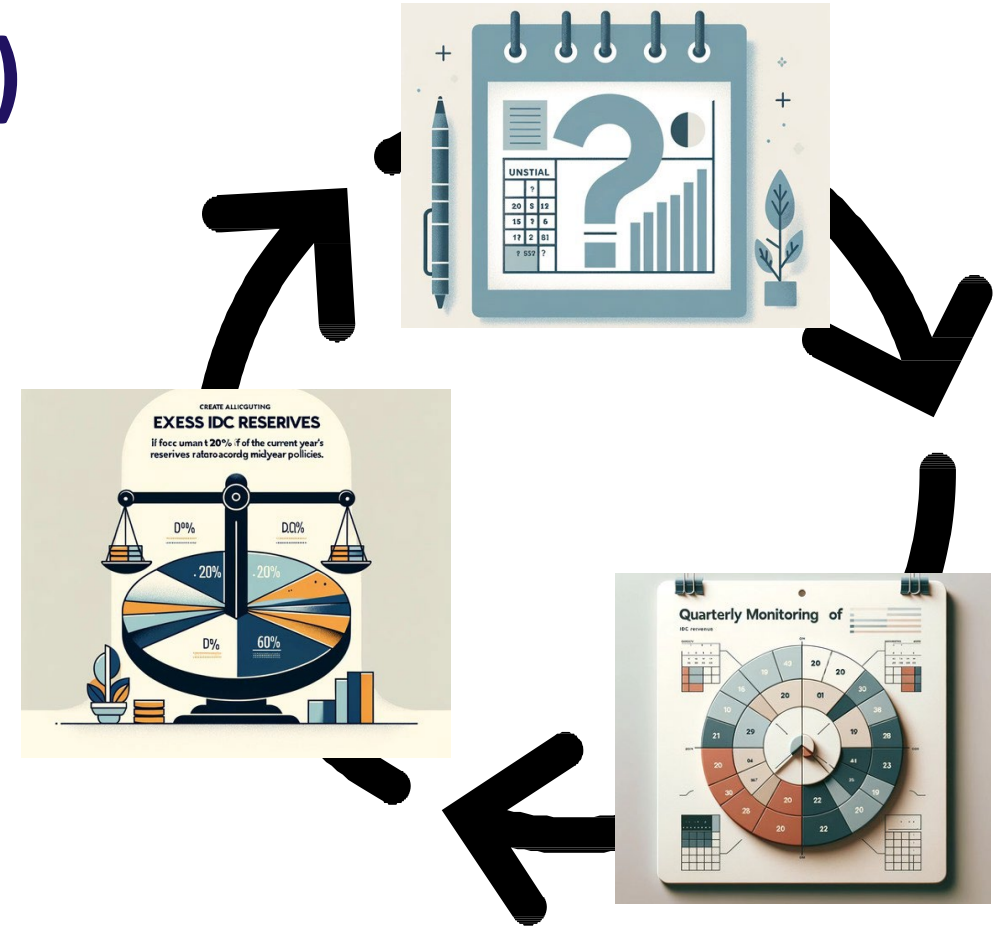
# Increasing Transparency

- By end of fall semester, Academic Resources website will report the amount of IDC generated by each college, and a detailed report on how IDC retained at Academic Resources and ORSP was spent during the previous fiscal year.
- By the end of the fall semester, each College must publish an annual report posted on the ORSP website reporting how much IDC they received and a detailed report on how it was spent.
- By the end of the fall semester, In Colleges where IDC is shared with Departments, department chairs are required to submit an annual report to the faculty reporting the amount of IDC received and a detailed report on how it was spent. These reports should be reviewed annually with the faculty in the department and any relevant staff who manage grants.



# Reserves & Carryforwards (University IDC)

- IDC revenue collected by the University in an upcoming fiscal year cannot be predicted with great accuracy.
- IDC revenue will be monitored quarterly. If at midyear it is determined that there will be more than 20% of the current year's reserve remaining at the end of the year, the reserve will be allocated according to the IDC distribution policies outlined in this policy.





# Unit Specific IDC

- Any unit that receives an IDC distribution can carryforward 10% of its IDC allocation to the following fiscal year without justification. This rule shall not apply if total IDC allocation is less than \$10,000.
- For any amount of carryforward greater than 10%, the relevant unit must write a justification for the use of that part of the carryforward over the course of the next 3 years.
- Colleges are asked to set aside 10 percent of their total carryforward IDC funds in an equipment maintenance account so that such funds can help with RSCA related equipment maintenance. Colleges that do not have any equipment to maintain are exempt from this requirement. The expectation is that the full 10% will be spent each year maintaining and updating research equipment and a report of the spending of the previous year's equipment maintenance account will be made available on the college's website at the beginning of each fall semester.



**These policies  
should be reviewed  
every 3 years by the  
University Budget  
Committee.**



**Please send any feedback about this proposed policy to [ubc@sfsu.edu](mailto:ubc@sfsu.edu)**





# Academic Affairs Multi-Year Budget Realignment Advisory Committee (MBRAC)

## **March UBC update**

**John Kim**

Interim Vice Provost, Academic Resources  
Academic Affairs

## 12 MBRAC committee members (updates since Feb. UBC in yellow):

Department Chairs: Liz Brown (Criminal Justice Studies, CHSS)  
Vance Vredenburg (Biology, COSE)  
Kim Schwartz (School of Theatre & Dance, LCA)  
Laura Epstein (Speech, Language and Hearing Sciences, GCoE)

Other Faculty: Robert Collins (American Indian Studies, CoES)  
Yvonne Bui (Special Education, GCoE)

Staff: Sam Ward (Facilities & Operations Specialist, CHSS)  
Janet Remolona (Personnel Officer, LFCoB)  
Christine Nagaya (Logistics Coordinator, Academic Technology)

Associate Deans: Yim-Yu Wong (LFCoB)  
Resha Cardone (LCA)

CBO liaison: Ly Chau (Director of Academic Budget, Academic Resources)

### Goal for Spring 2024:

- To conduct a comprehensive survey of Operating Expenses (OE) across AA
- To finalize enough work in time to help inform FY 2024-25 budget plan for AA

### Timeline (updates since Feb. UBC in yellow):

- **End of March:** solicit feedback regarding survey plan (Canvas site)
- **Mid-April:** complete survey for COSE, LCA, LFCoB, CHSS, AT
- **Mid-May:** complete survey for GCoE, CoES, LIB, other units in AA
- End of May: complete collection and organization of information
- End of Summer: complete final report

### Overall plan (based on MBRAC work this Spring 2024):

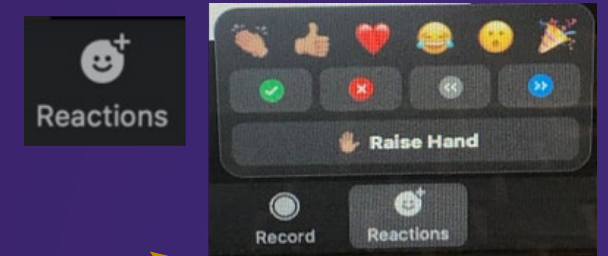
- (To start) to build OE into the GF operating budget plan for AA
- To identify other sustainable means of funding OE in AA

# 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.*

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

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