



SAN FRANCISCO
STATE UNIVERSITY

University Budget Committee

November 17, 2022

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 is at approximately 11:30 AM
- ◆ Today’s presentations will be posted to the UBC webpage soon

RSVP to ubc@sfsu.edu to attend UBC “Office Hours” tomorrow, Friday via Zoom:

(for Staff: 11:30AM – 12:30PM, for Faculty and MPPs, 10:00AM – 11:00AM)

Next UBC meeting

Thursday, December 15, 2022, 10:00AM – 12:00 PM via Zoom

Welcome

from UBC Co-Chairs

Amy Sueyoshi

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.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

For Staff and MPP/Faculty Sessions
Friday, November 18, 2022
11:30 AM – 12:30 PM via Zoom

RSVP to: ubc@sfsu.edu

All meetings take place via Zoom

AGENDA

Welcome/Office Hours/Agenda Review	Sueyoshi
Member rollcall	UBC staff
Minutes Approval (UBC October 2022 meeting)	Sueyoshi
President's Message	Mahoney
Updates/Informational Item	
<ul style="list-style-type: none">• Carryforward and Reserves Policy (Introduction)	Wilson

AGENDA

BREAK (5 min)

- | | |
|--|-----------------------|
| 6. 5-year Enrollment Projections | Sujitparapitaya/Lynch |
| 7. Budget Implications of Enrollment:
Tuition Revenue Projections | Wilson/Stoian |
| 8. Process Improvement | Sueyoshi |
| Public Forum | ALL |

Member Rollcall

Approval of Minutes

from UBC meeting October 26, 2022

All past meeting minutes can be found on the UBC Webpage

President's Message

Introduction: Carryforward, Reserves, and Designated Balances Policy

Jeff Wilson, Vice President of Administration & Finance and CFO

Carryforward, Reserves, and Designated Balances

Agenda

1. Introduction and Background
2. Policy walkthrough
3. Next Steps

[Note: 2022-2023 Carryforward, Reserves and Designated Balances were presented in October's UBC meeting]

Carryforward, Reserves, and Designated Balances

Agenda

- 1. Introduction and Background**
2. Policy walkthrough
3. Next Steps

Carryforward, Reserves, and Designated Balances

Introduction and Background

- Policy development occurred in 2020 with a UBC subcommittee
- President Mahoney has requested the policy effort be revived
- Policy includes strategy for campus and mechanics to align with CSU

Carryforward, Reserves, and Designated Balances

Agenda

1. Introduction and Background
- 2. Policy walkthrough**
3. Next Steps

Carryforward, Reserves, and Designated Balances

Policy

Policy has four (4) sections:

1. Objective
2. Background
3. Statement
4. Review

Carryforward, Reserves, and Designated Balances

Policy – Objective:

“to ensure designated balances, reserves, and carryforwards are administered to support San Francisco State University’s (the University, SF State) financial health, are recorded and reported transparently, and are expended according to state, CSU, and SF State regulations and policies.”

Carryforward, Reserves, and Designated Balances

Policy – Background:

- **Definitions**

- Designated Balances and Reserves
- Carryforwards
- Fund Balances

Carryforward, Reserves, and Designated Balances

Policy – Policy Statement:

- **Campus Approach**

- Designated balances and reserves
- Carryforwards
- Fund Balances
- Collective university-wide efforts
- Authority and responsibility

Carryforward, Reserves, and Designated Balances

Policy – Policy Statement:

- Recording and reporting designated balances and reserves
 - CSU Compliance
 - Procedures
 - Campus procedures

Carryforward, Reserves, and Designated Balances

Policy – Policy Statement:

- **Recording and Reporting Carryforwards**
 - Campus Approach
- **Recording and Reporting Fund Balances**
 - Campus Approach

Carryforward, Reserves, and Designated Balances

Policy – Policy Review:

Every five years or as recommended by the President or member of the University Budget Committee

Carryforward, Reserves, and Designated Balances

Agenda

1. Introduction and Background
2. Policy walkthrough
3. **Next Steps (discussion)**

5-year Enrollment Projections

Sutee Sujitparapitaya, Associate Provost, Institutional Analytics
Katie Lynch, Senior Associate Vice President, Enrollment Management



5 Year Enrollment Projections

UBC: November 17, 2022

*By Sutee Sujitparapitaya
Associate Provost, Institutional Analytics*

*Katie Lynch
Senior AVP, Enrollment Management*

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

Incoming Undergraduate Assumptions

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First-time Freshman:

- Fall 2023 will be flat with Fall 2022
- Fall 2024, Fall 2025 and Fall 2026 will show growth and resemble Fall 2019
- Spring 2023-2027 FTF will resemble Spring 2020

Lower Division Transfer:

- 20% annual growth for fall and spring semesters

Upper Division Transfer:

- Mid-point between Fall 2021 and Fall 2022 transfer- remain flat moving forward

Major Considerations:

- My Story campaign and developed strategic communication plan
- Campus tours, events, visits and return to on-site recruitment and college fair circuit
- Investment in inquiries to build prospective student pipeline
- Removal of impaction
- SF Promise/SFUSD Partnership
- Stability/Instability of recruitment staff

Continuing Undergraduate Assumptions

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Increased Fall and Spring Retention

- Increase by 1% above 3-year average of fall to spring and spring to fall

Summer:

- Average of last 4 summers

Major Considerations:

- Retention Operations and CSU Equity Priority work; particularly, removal of administrative barriers
- One Stop Advising model
- Continued use of Degree Planner
- Uncertainty about return to in-person class schedules

Incoming Graduate/Post-Bac Assumptions

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New Graduates and Post- Bac

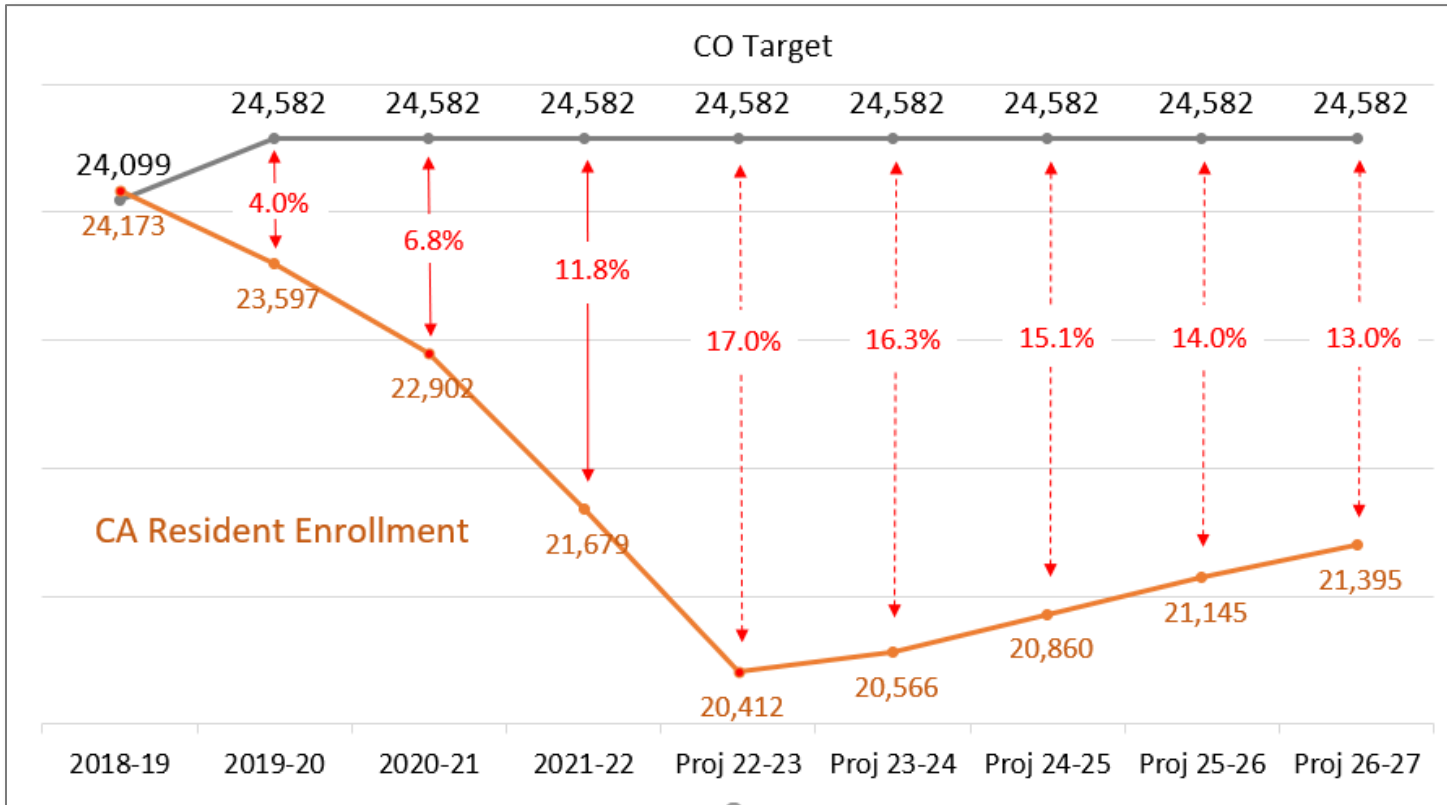
- Remain flat

Major Considerations:

- My Story Campaign
- Potential for international growth
- Department coordination on timeline and capacity

CA Resident Enrollment (FTEs)

30

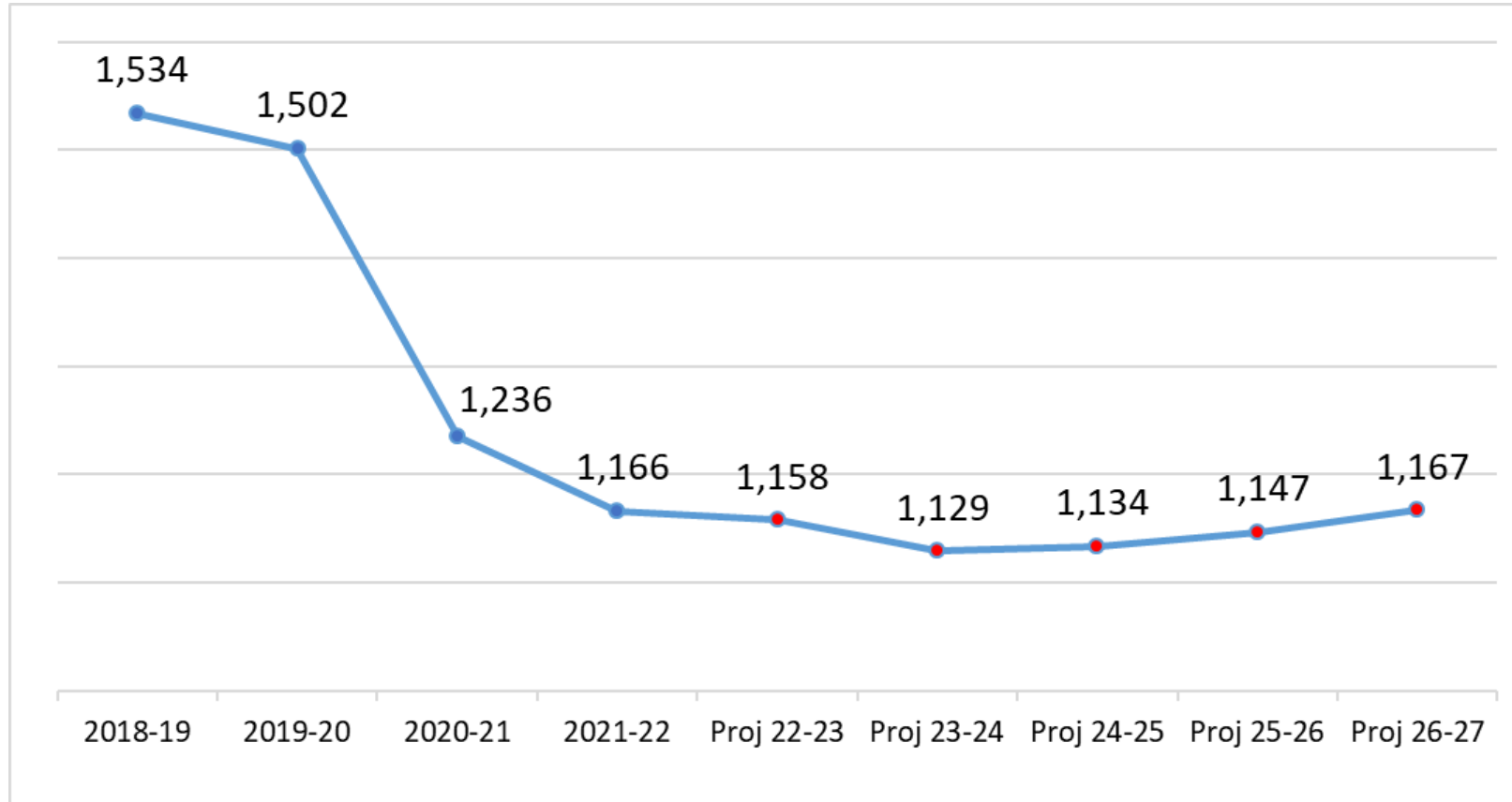


	CO Target	CA Resident FTEs	% +/- CO Res Target	% Change (Year to Year)
2018-19	24,099	24,173	0.3%	0.5%
2019-20	24,582	23,597	-4.0%	-2.4%
2020-21	24,582	22,902	-6.8%	-2.9%
2021-22	24,582	21,679	-11.8%	-5.3%
Proj 22-23	24,582	20,412	-17.0%	-5.8%
Proj 23-24	24,582	20,566	-16.3%	0.8%
Proj 24-25	24,582	20,860	-15.1%	1.4%
Proj 25-26	24,582	21,145	-14.0%	1.4%
Proj 26-27	24,582	21,395	-13.0%	1.2%

- 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

Non- CA Resident Enrollment (FTEs)

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	Non-Resident FTES	% Change (Year to Year)
2018-19	1,534	2.2%
2019-20	1,502	-2.1%
2020-21	1,236	-17.7%
2021-22	1,166	-5.6%
Proj 22-23	1,158	-0.7%
Proj 23-24	1,129	-2.5%
Proj 24-25	1,134	0.4%
Proj 25-26	1,147	1.1%
Proj 26-27	1,167	1.7%

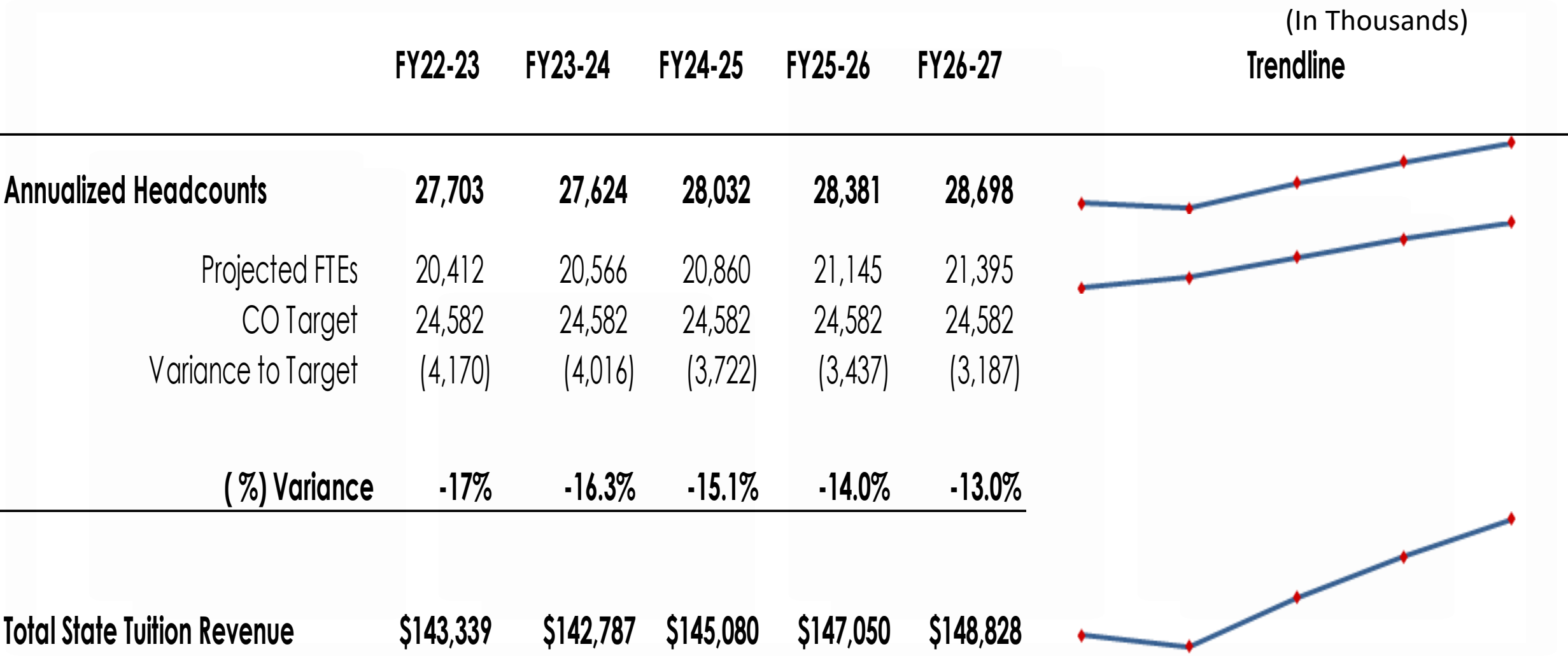
- *Non-CA Residents = Outside CA Students + Internationals*

Budget Implications of Enrollment/ Tuition Revenue Projections

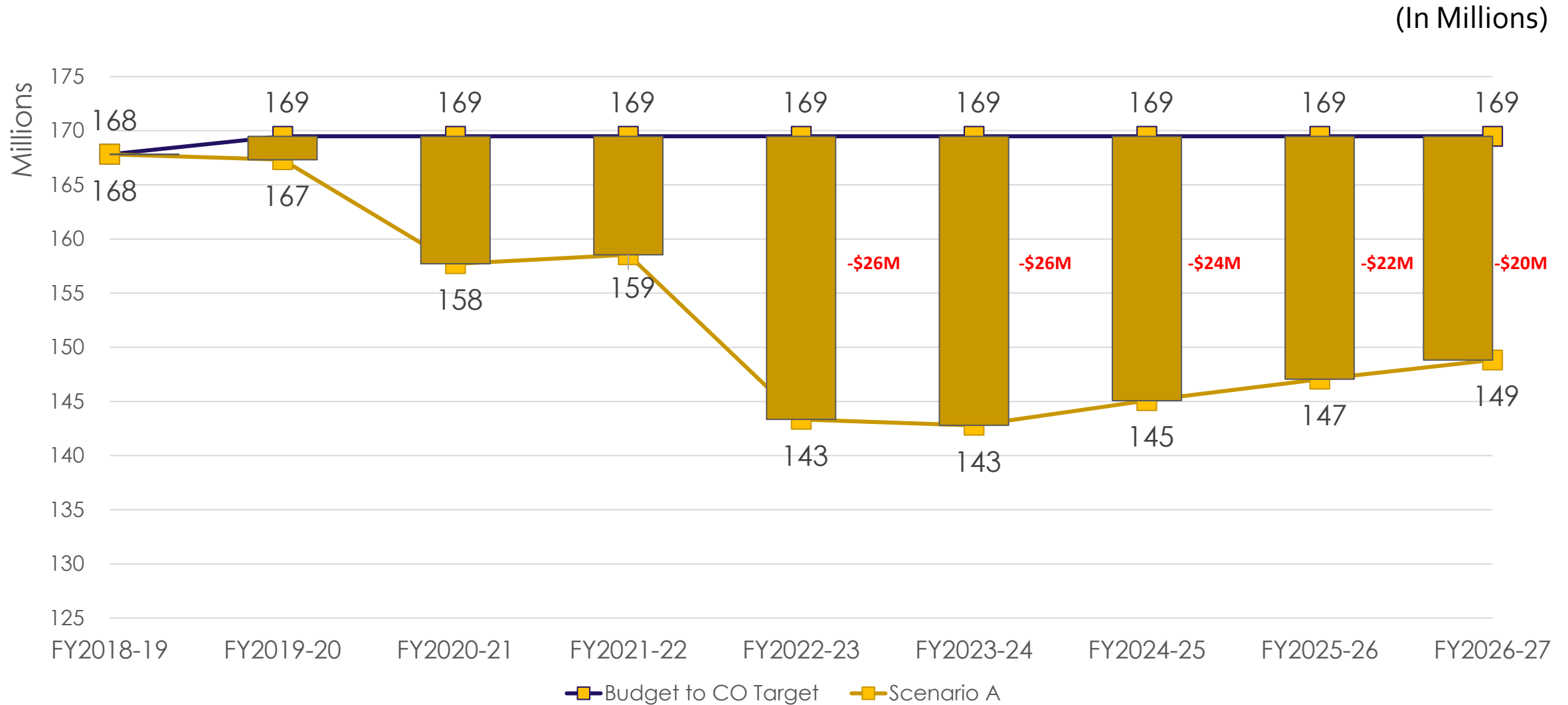
Jeff Wilson, CFO and Vice President of Administration & Finance

Elena Stoian, Executive Director of Budget Administration & Operations

Scenario A: Tuition Revenue Projection



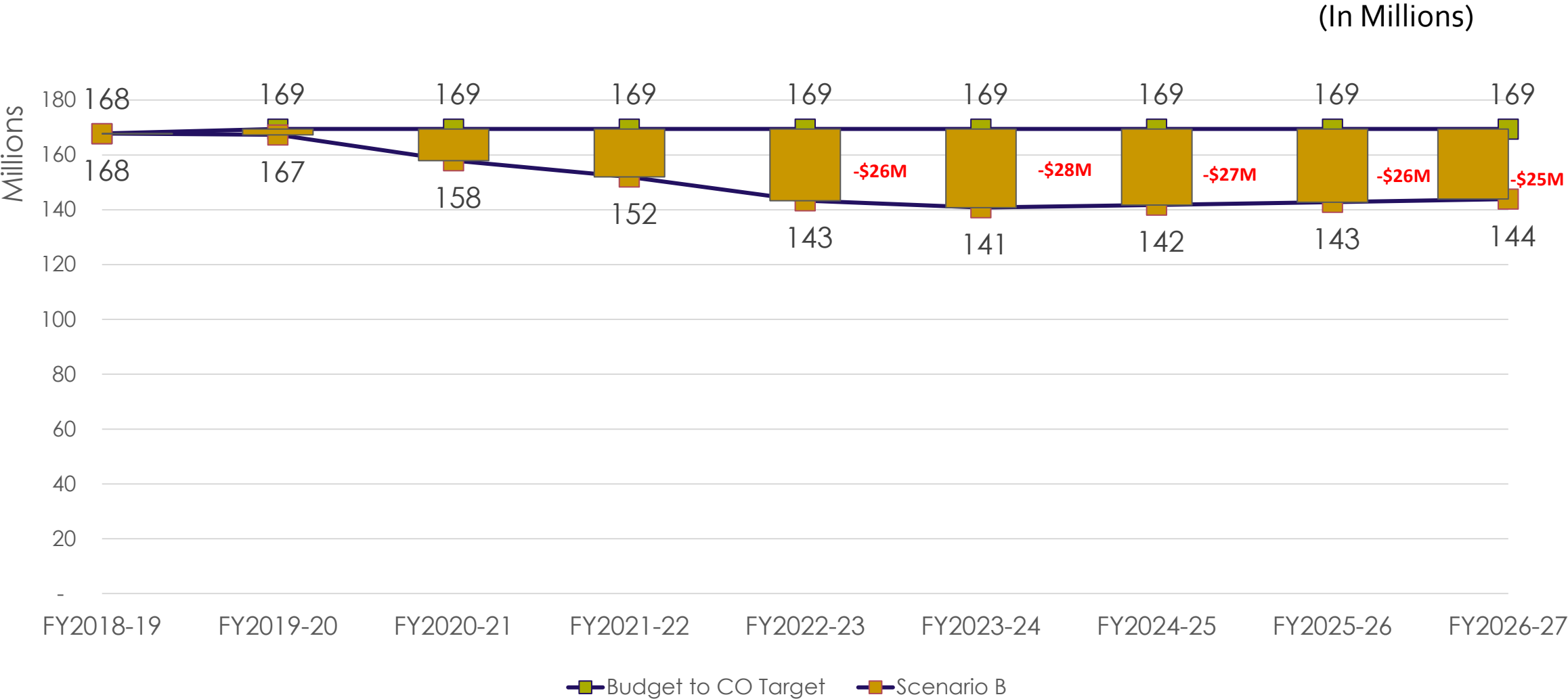
Scenario A: Tuition Revenue Projection



Scenario B: Tuition Revenue Projection

	FY22-23	FY23-24	FY24-25	FY25-26	FY26-27	(In Thousands) Trendline
Annualized Headcounts	27,703	27,273	27,438	27,621	27,822	
Projected FTEs	20,412	20,253	20,337	20,478	20,630	
CO Target	24,582	24,582	24,582	24,582	24,582	
Variance to Target	(4,170)	(4,329)	(4,245)	(4,104)	(3,952)	
(%) Variance	-17%	-17.6%	-17.3%	-16.7%	-16.1%	
Total State Tuition Revenue	\$143,339	\$140,815	\$141,749	\$142,778	\$143,917	

Scenario B: Tuition Revenue Projection



FY2022-23 Fall Revenue Projection

(In Thousands)

	Revised Budget	Fall Projection		
	FY2022-23	FY2022-23	\$ Change	% Change
General Fund Allocation	\$220,054	\$220,054	\$0	0.0%
State University Tuition Fee	152,319	143,339	-8,981	-5.9%
Non-Resident Tuition Fee	11,777	12,202	425	3.6%
Other Higher Ed Fees	2,139	2,180	41	1.9%
Revenue From Investments	1,200	762	-438	-36.5%
Revenue Adjustments	7,922	8,219	297	3.8%
Subtotal Revenue	175,357	166,702	-8,655	-4.9%
Total Resources	\$395,411	\$386,755	-\$8,656	-2.2%

Process Improvement Discussion

Amy Sueyoshi, Provost and Vice President of Academic Affairs

Public Forum

*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>