

Business and Financial Affairs
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Thomas McCarron
Vice President and CFO

MEMORANDUM

DATE: April 28, 2017

TO: Elliot Hirshman
President

FROM: Tom McCarron 
Chair, President's Budget Advisory Committee

SUBJECT: President's Budget Advisory Committee
Recommendation of April 27, 2017

Attached is the recommendation from the President's Budget Advisory Committee (PBAC) meeting of April 27, 2017 for approval of 2017/18 divisional base and one-time funding requests totaling \$24,441,770. An unallocated base reserve of \$712,186 will remain upon approval of these requests.

Supporting materials are attached for your information. I recommend your approval.

If you have any questions, please let me know.

Attachments

PRESIDENT'S BUDGET ADVISORY COMMITTEE

April 27, 2017

RECOMMENDATION

Approve 2017/18 funding requests:

Strategic Planning Initiatives ⁽¹⁾


| Division | 2017/18 One-Time | 2017/18 Base | 2017/18 Total |
|--------------|---------------------|------------------|-------------------|
| AA | 6,544,000 | 1,999,055 | 8,543,055 |
| SA | 1,300,000 | 407,167 | 1,707,167 |
| BFA | | 136,500 | 136,500 |
| URD | 100,000 | 200,000 | 300,000 |
| INSTIT | 750,000 | 82,188 | 832,188 |
| Total | 8,694,000 | 2,824,910 | 11,518,910 |

Critical Support Needs ⁽¹⁾

| Division | 2017/18 One-Time | 2017/18 Base | 2017/18 Total |
|--------------|---------------------|------------------|-------------------|
| AA | 4,803,700 | 1,536,000 | 6,339,700 |
| SA | 208,000 | | 208,000 |
| BFA | 390,000 | 620,160 | 1,010,160 |
| URD | | | 0 |
| INSTIT | 5,365,000 | | 5,365,000 |
| Total | 10,766,700 | 2,156,160 | 12,922,860 |

(1) Detail by division included in PBAC materials; divisional totals include benefit funding.

Approved by:



Elliot Hirshman, President

4/27/17

Date

President's Budget Advisory Committee
Meeting Agenda

April 27, 2017
2:00p.m. @ MH-3318

I. Call to order

- Call for amendments to agenda

II. Information Item

III. Reports

- 2016/17 Revenues (Attachment 1)
- 2016/17 Base Reserves (Attachment 2)
- 2016/17 One-Time Reserves (Attachment 3)

IV. Watch List

- Master Plan Costs
- Unfunded Compensation Items
- Campus Projects

V. 2017/18 Funding Requests

- 2017/18 AA Budget Proposals (Attachment 4)
- 2017/18 BFA Budget Proposals (Attachment 5)
- 2017/18 INSTIT Budget Proposals (Attachment 6)
- 2017/18 Consolidated Funding Requests (Attachment 7)

VI. 2017/18 Budget

- 2017/18 Estimated 2017-01 Budget (Attachment 8)
- Multi-Year Budget (Attachment 9)

VII. New Business

VIII. Reminder

- Next Meeting Date – May 11, 2017 at 2:00 p.m. in MH 3318

SAN DIEGO STATE UNIVERSITY
2016/17 Revenue Estimates
As of April 27, 2017

| | 2015/16 Budget | 2015/16 Actual | Over/(Under) Budget | % Over/(Under) Budget | 2016/17 Budget | 2016/17 Year to Date 4/20/2017 | 2016/17 Term End Estimate | Over/(Under) Budget | % Over/(Under) Budget |
|---|-------------------|-------------------|------------------------|-----------------------------|-------------------|--------------------------------------|---------------------------------|------------------------|-----------------------------|
| Basic Tuition Fee - Resident | | | | | | | | | |
| Summer | 8,683,000 | 8,896,638 | 213,638 | 2.46% | 7,959,000 | 7,733,037 | 7,733,037 | (225,963) | -2.84% |
| Fall | 73,765,000 | 75,272,814 | 1,507,814 | 2.04% | 75,204,000 | 75,977,113 | 75,977,113 | 773,113 | 1.03% |
| Spring | 67,526,000 | 69,103,275 | 1,577,275 | 2.34% | 68,192,000 | 67,176,003 | 68,399,000 | 207,000 | 0.30% |
| Sub-Total Basic Tuition - Resident | 149,974,000 | 153,272,726 | 3,298,726 | 2.20% | 151,355,000 | 150,886,153 | 152,109,150 | 754,150 | 0.50% |
| Tuition Fee Discounts | (40,951,800) | (40,951,800) | 0 | 0.00% | (41,243,800) | (41,243,800) | (41,243,800) | 0 | 0.00% |
| Net Basic Tuition - Resident | 109,022,200 | 112,320,926 | 3,298,726 | 3.03% | 110,111,200 | 109,642,353 | 110,865,350 | 754,150 | 0.68% |
| Basic Tuition Fee - Non-Resident | | | | | | | | | |
| Summer | 733,000 | 1,470,625 | 737,625 | 100.63% | 983,000 | 1,532,792 | 1,532,792 | 549,792 | 55.93% |
| Fall | 7,169,000 | 10,979,946 | 3,810,946 | 53.16% | 7,662,000 | 11,954,837 | 11,954,837 | 4,292,837 | 56.03% |
| Spring | 6,542,000 | 9,958,918 | 3,416,918 | 52.23% | 6,931,000 | 10,350,288 | 10,485,000 | 3,554,000 | 51.28% |
| Sub-Total Basic Tuition - Non-Resident | 14,444,000 | 22,409,489 | 7,965,489 | 55.15% | 15,576,000 | 23,837,918 | 23,972,629 | 8,396,629 | 53.91% |
| Out-of-State Tuition | | | | | | | | | |
| Summer | 485,000 | 731,127 | 246,127 | 50.75% | 487,000 | 812,178 | 812,178 | 325,178 | 66.77% |
| Fall | 6,634,000 | 10,505,131 | 3,871,131 | 58.35% | 7,003,000 | 12,134,275 | 12,134,275 | 5,131,275 | 73.27% |
| Spring | 5,880,000 | 9,400,585 | 3,520,585 | 59.87% | 6,267,000 | 10,631,843 | 10,768,000 | 4,501,000 | 71.82% |
| Sub-Total Out-of-State Tuition | 12,999,000 | 20,636,843 | 7,637,843 | 58.76% | 13,757,000 | 23,578,297 | 23,714,453 | 9,957,453 | 72.38% |
| International Tuition | | | | | | | | | |
| Summer | 827,000 | 1,085,496 | 258,496 | 31.26% | 724,000 | 1,260,336 | 1,260,336 | 536,336 | 74.08% |
| Fall | 5,879,000 | 9,143,743 | 3,264,743 | 55.53% | 6,096,000 | 9,842,295 | 9,842,295 | 3,746,295 | 61.45% |
| Spring | 5,528,000 | 8,554,761 | 3,026,761 | 54.75% | 5,703,000 | 8,313,844 | 8,738,000 | 3,035,000 | 53.22% |
| Sub-Total International Tuition | 12,234,000 | 18,784,001 | 6,550,001 | 53.54% | 12,523,000 | 17,416,475 | 19,840,631 | 7,317,631 | 58.43% |
| TOTAL TUITION | 148,699,200 | 174,151,258 | 25,452,058 | 17.12% | 151,967,200 | 174,475,042 | 178,393,064 | 26,425,864 | 17.39% |
| Application Fee | | | | | | | | | |
| | 2,294,000 | 3,420,630 | 1,126,630 | 49.11% | 2,294,000 | 3,415,995 | 3,415,995 | 1,121,995 | 48.91% |
| TOTAL APPLICATION FEE | 2,294,000 | 3,420,630 | 1,126,630 | 49.11% | 2,294,000 | 3,415,995 | 3,415,995 | 1,121,995 | 48.91% |
| TOTAL | 150,993,200 | 177,571,888 | 26,578,688 | 17.60% | 154,261,200 | 177,891,037 | 181,809,059 | 27,547,859 | 17.86% |

(1) Term estimates are based on actual revenues.
(2) Term estimates are based on SAS Enrollment Report as of 4/4/2017 discounted based on prior year waiver/collections experience.

Base Budget Reserve^[a]

| | | | |
|---|--|----------------|--------------|
| 2016/17 Beginning Base Budget Reserve Balance | | | 5,200,077 |
| | BL Allocations | | 13,780,000 |
| | BL Mandatory Costs | | (17,269,000) |
| | Campus Revenue Adjustments | | 3,268,000 |
| 2016/17 Base Budget Reserve | | | 4,979,077 |
| 2016/17 Approved Base Funding Requests | | | |
| President's Office | | | |
| Academic Affairs | | | |
| | Red Cross Membership | PBAC 5/26/2016 | (10,000) |
| | Tenure and Promotion | PBAC 5/26/2016 | (324,817) |
| | Tenure Track Faculty Market Equity | PBAC 5/26/2016 | (70,000) |
| | Honors College | PBAC 5/26/2016 | (136,400) |
| | Library Funding | PBAC 5/26/2016 | (100,000) |
| | Zahn Center | PBAC 5/26/2016 | (200,000) |
| | Design Think Lab | PBAC 5/26/2016 | (40,000) |
| | Research Advancement | PBAC 5/26/2016 | (300,000) |
| | Math Learning Center | PBAC 5/26/2016 | (68,000) |
| | Arts Alive | PBAC 5/26/2016 | (27,800) |
| | Inter-Folio (online faculty recruitment) | PBAC 5/26/2016 | (70,000) |
| | MatLabs - Mathworks | PBAC 5/26/2016 | (60,000) |
| | Liberal Studies | PBAC 5/26/2016 | (36,000) |
| | IVC non-faculty funds | PBAC 5/26/2016 | (105,000) |
| | Sage Project | PBAC 5/26/2016 | (50,000) |
| | GREW | PBAC 5/26/2016 | (154,000) |
| | Undergraduate Summer Research Program | PBAC 5/26/2016 | (50,000) |
| | MRI Personnel | PBAC 5/26/2016 | (388,000) |
| | IVC Operations Budget | PBAC 5/26/2016 | (20,000) |
| | Adobe Software | PBAC 5/26/2016 | (98,000) |
| Student Affairs | | | |
| | Assist Director of International Programs | PBAC 5/26/2016 | (64,547) |
| | Aztec Mentor Program (AMP) software (Annual) | PBAC 5/26/2016 | (54,099) |
| | EOP Learning Support Center | PBAC 5/26/2016 | (20,000) |
| | One SDSU Community Program | PBAC 5/26/2016 | (65,000) |
| Business & Financial Affairs | | | |
| | Public Safety - Code Compliance Staff | PBAC 5/26/2016 | (75,000) |
| | Facilities Services - Second Shift Supervisor | PBAC 5/26/2016 | (130,800) |
| | Public Safety - Salary Costs (IRP, Shift Differential, OT) | PBAC 5/26/2016 | (313,358) |
| | Public Safety - Clery and Emergency Services Coordinator | PBAC 5/26/2016 | (40,000) |
| | EHS - Industrial and Chemical Hygiene Officer | PBAC 5/26/2016 | (90,000) |
| | HR - Background Check | PBAC 5/26/2016 | (25,000) |
| University Relations & Development | | | |
| | National Branding & Marketing | PBAC 5/26/2016 | (100,000) |
| Institutional | | | |
| | Title IX Student Conduct Investigator | PBAC 5/26/2016 | (105,000) |
| Subtotal 2016/17 Approved Base Budget Funding Requests | | | (3,390,821) |
| 2016/17 PENDING Base Funding Requests | | | |
| SubTotal 2016/17 PENDING Base Funding Requests | | | 0 |
| 2016/17 Estimated Base Budget Reserve Balance | | | 1,588,256 |
| 2016/17 Target Unallocated Base Budget Reserve | | | (4,000,000) |
| 2016/17 Estimated Base Funding Available for Investment in the University | | | (2,411,744) |

[a] All allocations for position funding are inclusive of average benefits costs.

One-Time Reserve [a]

| | |
|---|-------------|
| 2016/17 Beginning One-Time Reserve Balance | 9,986,199 |
| 2016/17 Target Unallocated One-Time Budget Reserve | (8,000,000) |
| 2016/17 One-Time Funding Available for Investment in the University | 1,986,199 |

2016/17 Approved One-Time Funding Requests

Academic Affairs

| | | |
|---|----------------|-------------|
| Zahn Center | PBAC 5/26/2016 | (80,000) |
| Writing Center | PBAC 5/26/2016 | (50,000) |
| Arts Alive | PBAC 5/26/2016 | (50,000) |
| Undergraduate Summer Research Program | PBAC 5/26/2016 | (150,000) |
| T/TT Faculty Start-up (Areas of Excellence) | PBAC 5/26/2016 | (1,200,000) |
| Graduate Student Support (Areas of Excellence) | PBAC 5/26/2016 | (250,000) |
| New TT start-up equipment | PBAC 5/26/2016 | (3,460,000) |
| GRF program | PBAC 5/26/2016 | (96,000) |
| Faculty Bridge Funding | PBAC 5/26/2016 | (150,000) |
| Research Faculty Assigned Time | PBAC 5/26/2016 | (125,000) |
| Matching Grant Funds | PBAC 5/26/2016 | (400,000) |
| Competitive Call - Shared Research Equipment | PBAC 5/26/2016 | (150,000) |
| MRI Magnet | PBAC 5/26/2016 | (1,500,000) |
| Summer SMART Technology Upgrades | PBAC 5/26/2016 | (400,000) |
| Laboratory Renovations | PBAC 5/26/2016 | (1,300,000) |
| EDU Technology Initiative for Teachers | PBAC 5/26/2016 | (62,000) |
| Don Powell Sound Shell | PBAC 5/26/2016 | (270,000) |
| GMCS Computer Lab | PBAC 5/26/2016 | (69,600) |
| Replacement LS Server HVAC | PBAC 5/26/2016 | (41,000) |
| Expand Student Research Symposium | PBAC 5/26/2016 | (44,000) |
| Supplemental Instruction / Learning Analytics | PBAC 5/26/2016 | (217,000) |
| Hostler - matching funds | PBAC 5/26/2016 | (90,000) |
| Provost Milestone Award | PBAC 5/26/2016 | (100,000) |
| Visiting Scholars | PBAC 5/26/2016 | (75,000) |
| Recruitment/Retention of Underrepresented Faculty | PBAC 5/26/2016 | (20,000) |
| 2015/16 Resident Enrollment (244 FTES) | PBAC 5/26/2016 | (459,800) |
| Non Resident Enrollment (1533 FTES) | PBAC 5/26/2016 | (2,909,280) |
| DUS Student Achievement Initiatives | PBAC 5/26/2016 | (52,000) |
| SDCC Funding | PBAC 5/26/2016 | (150,000) |
| Software Licenses / Altirus Patching | PBAC 5/26/2016 | (305,176) |
| Equip Maintenance Contracts | PBAC 5/26/2016 | (300,152) |
| Library Subscriptions | PBAC 5/26/2016 | (300,000) |
| Accreditation Fees | PBAC 5/26/2016 | (203,100) |
| Enrollment Growth Support (551 res/404 non-res FTES) | PBAC 2/16/2017 | (2,133,792) |
| MRI Magnet | PBAC 2/16/2017 | (1,919,379) |
| Advancing Student Success through Data-Informed Advising Initiative | PBAC 4/13/2017 | (800,000) |

Student Affairs

| | | |
|---|----------------|-----------|
| Aztec Mentor Program (AMP) software (Annual) | PBAC 5/26/2016 | (13,999) |
| Aztecs Hiring Aztecs (AHA!) Campaign | PBAC 5/26/2016 | (108,100) |
| EOP Renovation | PBAC 5/26/2016 | (750,000) |
| OFAS Renovation | PBAC 5/26/2016 | (625,000) |
| Pride Center and Women's Resource Center Infrastructure | PBAC 5/26/2016 | (33,650) |

Business & Financial Affairs

| | | |
|---|----------------|----------|
| Title IX Administrative Support (Student Success) | PBAC 5/26/2016 | (5,000) |
| Title IX Case Management Software (Student Success) | PBAC 5/26/2016 | (8,000) |
| Public Safety Dispatcher | PBAC 5/26/2016 | (95,000) |

University Relations & Development

| | | |
|---------------------------------|----------------|-----------|
| National Branding & Marketing | PBAC 5/26/2016 | (100,000) |
| Direct Mail | PBAC 5/26/2016 | (100,000) |
| 360 Magazine | PBAC 5/26/2016 | (25,000) |
| Planned Giving Marketing Budget | PBAC 5/26/2016 | (75,000) |

SAN DIEGO STATE UNIVERSITY
2016/17 Reserves

ATTACHMENT 3
PBAC APRIL 27, 2017
Page 2 of 2

Institutional

| | | |
|--|----------------|---------------------|
| Staff Professional Development (across the University) | PBAC 5/26/2016 | (250,000) |
| Enhancing Campus Climate and Culture (ECCC) initiatives | PBAC 5/26/2016 | (1,000,000) |
| SDSU Research Foundation | PBAC 5/26/2016 | (1,000,000) |
| Worker's Compensation | PBAC 5/26/2016 | (700,000) |
| Painting | PBAC 5/26/2016 | (500,000) |
| Campus Duress Phone Upgrade | PBAC 5/26/2016 | (30,000) |
| EBA/College Ave Wall Replacement | PBAC 5/26/2016 | (200,000) |
| Freedom of Expression Task Force | PBAC 2/16/2017 | (25,000) |
| Chiller Plant Critical Repairs (Fowler) | PBAC 2/16/2017 | (791,341) |
| Repair Sewer Line (Aztec Circle/GMCS) | PBAC 2/16/2017 | (120,433) |
| Repair Storm Drain (near Children's Center) | PBAC 2/16/2017 | (200,000) |
| Repair Fume Hood (PSFA) | PBAC 2/16/2017 | (142,069) |
| Campus Lighting (safety) | PBAC 2/16/2017 | (45,537) |
| Manchester Hall Alcove (smoke deterrent) | PBAC 2/16/2017 | (24,508) |
| Reserve for FY 2017/18 Funding Gap | PBAC 2/16/2017 | (5,000,000) |
| Painting | PBAC 4/13/2017 | (500,000) |
| SubTotal 2016/17 Approved One-Time Funding Requests | | (32,349,916) |

2016/17 PENDING One-Time Funding Requests

SubTotal 2016/17 PENDING One-Time Funding Requests

0

2016/17 Funding Sources

| | |
|--|-------------------|
| AA - Encumbered in 2016/17, Base in 2017/18 - available for one-time use in 2016/17 | 1,500,000 |
| GF Base Compensation (15/16) withheld by CO - Faculty (2%) | 2,424,000 |
| 2016/17 Student Success & Completion/Graduation Initiatives | 254,000 |
| 2016/17 Student Success (\$35M CSU) | 1,650,000 |
| Estimated Tuition and Fee Revenues over Budget (Sum/Fall Only) | 15,128,864 |
| Estimated Tuition and Fee Revenues over Budget (Spring/Application Only) | 12,418,995 |
| Estimated One-Time Carry-forward of Base Budget Reserve | 1,588,256 |
| 2016/17 Estimated One-Time Reserve Balance | 12,600,398 |
| 2016/17 Target Unallocated One-Time Budget Reserve | (8,000,000) |
| 2016/17 Estimated One-Time Funding Available for Investment in the University | 4,600,398 |

[a] All allocations for position funding are inclusive of average benefits costs.

Academic Affairs
Requests for 2017-18 Base Budget Allocations

| | 2017-18 Requests |
|---|---------------------------|
| <i>Base Allocation Requests - Total</i> | <i>\$3,535,055</i> |
| <i>Strategic Planning Initiatives (subtotal)</i> | <i>\$1,999,055</i> |
| 1. Tenure-Track Faculty Hiring | \$1,500,000 |
| 2. Tenure and Promotion | \$399,055 |
| 3. Library Funding | \$100,000 |
| <i>Critical Needs (subtotal)</i> | <i>\$1,536,000</i> |
| 4. IVC Operations Budget | \$20,000 |
| 5. Instructional Student Assistants | \$500,000 |
| 6. University Graduate Fellowship (UGF) | \$500,000 |
| 7. CES-Funded Faculty Positions | \$271,000 |
| 8. Supplemental Instruction | \$245,000 |

ACADEMIC AFFAIRS
2017-18 Base and One-Time Requests

| | | | |
|--|-------------|---|--|
| Base (total) | | \$3,535,055 | |
| Strategic Planning Initiatives (subtotal) | | \$1,999,055 | |
| 1. TENURE-TRACK FACULTY HIRING | \$1,500,000 | Rebuilding faculty lines is a strategic initiative essential to promote student success in general, students' timely graduation (Graduation Initiative 2025) in particular. Funds are requested to support hiring (salaries and benefits) of up to 56 new faculty. These UOF-supported positions, combined with the SSF-supported positions would enable us to reach the strategic goal of 300 new faculty by Fall 2018. Currently requested \$1.5M from UOF represents partial funding for the 56 positions, with another \$1.5M, adjusted for the actual need, to be allocated in 2018/19. | |
| 2. TENURE AND PROMOTION | \$399,055 | Funds are requested to cover the costs of the salary increase for a cohort of 48 faculty members currently considered for tenure, promotion, or both. Article 31.5 of the CFA Bargaining Agreement specifies "Promotion shall be accompanied by advancement of at least nine percent (9%) on the salary increase." The requested sum represents the costs of the mandatory 9% increase of the faculty July 1, 2017 salaries (Note: Per CFA BA, all Bargaining Unit 3 members are scheduled to receive a 3.5% salary increase on July 1, 2017). | |
| 3. LIBRARY FUNDING | \$100,000 | Funds are requested re-build Library capacity to provide access to the essential sources needed for teaching, research, and creative endeavors. Given that both student success and faculty professional growth depend on these resources, and taking into account a limited base fund, a plan was developed to rebuild this capacity over a 5-year period. Current request represents third of the five-year plan. Because immediate needs far exceed current subscription budget, this request for a base funding is supplemented with a request for one-time funding. | |
| Critical Needs (subtotal) | | \$1,536,000 | |
| 4. IVC OPERATIONS BUDGET | \$20,000 | Funds are requested to increase base funding for the IVC operations budget over the course of five years (\$20k x 5 = \$100k). These funds will go toward critical needs, including increasing security, compliance with the ADA. Current request represents second of the five-year plan. | |
| 5. INSTRUCTIONAL STUDENT ASSISTANTS | \$500,000 | Funds are requested for student assistants who support instruction through a variety of activities, including grading in large section classes and setting up/ assisting with the laboratory and performing art classes. Student assistant support is critical to maintain pedagogical standards and facilitate learning outcomes in large section classes, as well as those classes whose disciplinary nature emphasizes individuated approach (e.g., STEM laboratory classes). Hence, such support is instrumental toward student success and timely graduation (Graduation 2015 Initiative). | |
| 6. UNIVERSITY GRADUATE FELLOWSHIP (UGF) | \$500,000 | Funds are requested for competitive, merit-based stipends for students in SDSU's PhD programs. These programs are an integral part of the SDSU academic identity, critical for its research and educational mission. University Graduate Fellowship program, common at research universities is yet to be established at SDSU after more than 50 years of doctoral studies history. Current sources of stipend support in these programs are research grants, teaching, external fellowships, and institutional support through the instructional budget. Successful recruiting and degree progress in these programs are threatened by uncertainty or inadequacy of future grant funding, excessive teaching loads, and/or strains on college budgets. A University Doctoral Fellowship program seeks to relieve these constraints, both by complementing the other sources and creating a more efficient system by which they are combined. Specifically, these fellowships will be conditioned on and complemented by external sources (e.g., grants, external fellowships) thereby relieving the pressures for support from instructional sources. Because immediate needs far exceed current subscription budget, this request for a base funding is supplemented with a request for one-time funding. | |
| 7. CES-FUNDED FACULTY POSITIONS | \$271,000 | Two faculty positions were initially established using CES funds with the goal of supporting CES-related operations in two colleges. Over time, these positions evolved away from their original mission and currently support instructional activities. This, in concert with the budgetary constraints currently experienced by the CES, necessitate that the funding for these position (salary plus benefits) is shifted to the UOF. | |

| | |
|--------------|-------------|
| Base (total) | \$3,535,055 |
|--------------|-------------|

| | | |
|-----------------------------|-----------|--|
| 8. SUPPLEMENTAL INSTRUCTION | \$245,000 | <p>Supplemental Instruction program Funds are requested to continue and expand the SI program from four to seven high-challenge courses. The program has proved very successful in increasing student success in high-challenge courses course as evident in a reduction of the percentage of DFW grades and an increase in the percentage of high marks (A,B) in the participating courses. Consequently, base funds are requested to ensure program's stability for the future. Because demands for the program exceed the costs that can be covered by this base funding, this request for a base funding is supplemented with a request for additional one-time funding. Combined, these funds will support the SI program expansion from four to seven high-challenge classes. Note that more than 2/3 of the funds will be used toward the SI leader compensation, with the remaining funds supporting SI coordinator, and covering operational and assessment activities.</p> |
|-----------------------------|-----------|--|

**Academic Affairs
Requests for 2017-18 One-Time Budget Allocations**

| <i>One-Time Allocation Requests - Total</i> | 2017-18 Requests \$11,347,700 |
|---|--|
| <i>Strategic Planning Initiatives (subtotal)</i> | \$6,544,000 |
| <i>New TT Faculty Support (subtotal)</i> | \$2,000,000 |
| 1. Start-up Funds for New TT Faculty | \$2,000,000 |
| <i>Research Support (subtotal)</i> | \$725,000 |
| 2. Matching Grant Funds | \$400,000 |
| 3. Research Faculty Bridge Funding | \$150,000 |
| 4. Research Faculty Assigned Time | \$125,000 |
| 5. Graduate Research Grant Writing Program | \$50,000 |
| <i>Transformative Educational Experience (subtotal)</i> | \$344,000 |
| 6. Undergraduate Research Program | \$200,000 |
| 7. Expansion of Student Research Symposium | \$44,000 |
| 8. Supplemental Instruction | \$100,000 |
| <i>Facilities & Technology Enhancement (subtotal)</i> | \$3,250,000 |
| 9. Summer Smart Technology Upgrades | \$500,000 |
| 10. Classroom/Teaching Laboratory Renovations | \$2,500,000 |
| 11. Library Outdoor Seating | \$250,000 |
| <i>Provost Initiatives (subtotal)</i> | \$225,000 |
| 12. Provost Milestone Award | \$100,000 |
| 13. Visiting Scholars | \$75,000 |
| 14. Provost Undergraduate Mentoring Program | \$50,000 |
| <i>Critical Support Needs (subtotal)</i> | \$4,803,700.00 |
| <i>Enrollment Growth Support (subtotal)</i> | \$2,940,000.00 |
| 15. 2016-17 Enrollment Growth (1400 FTES) | \$2,940,000.00 |
| <i>Student Achievement (subtotal)</i> | \$682,500.00 |
| 16. University Graduate Fellowship (UGF) | \$500,000 |
| 17. DUS Student Achievement Initiatives | \$32,500 |
| 18. SDCC Funds for Remedial Instruction | \$150,000 |
| <i>Subscriptions and Equipment(subtotal)</i> | \$827,000.00 |
| 19. Library Subscriptions | \$400,000.00 |
| 20. NCFDD Membership and IHE subscription | \$116,000.00 |
| 21. Equipment Maintenance | \$311,000.00 |
| <i>Program & Operations Improvements (subtotal)</i> | \$354,200.00 |
| 22. General Education Program Reform | \$45,600.00 |
| 23. New Registration Timeline Support | \$249,600.00 |
| 24. Center for Teaching & Learning | \$59,000.00 |

ACADEMIC AFFAIRS
2017-18 Base and One-Time Requests

| | |
|------------------|--------------|
| One-Time (Total) | \$11,347,700 |
|------------------|--------------|

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|---|-------------|
| Strategic Planning Initiatives (subtotal) | \$6,544,000 |
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| New TT Faculty Support (subtotal) | \$2,000,000 |
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| 1. START-UP FUNDS FOR NEW TT FACULTY | \$2,000,000 | Funds are requested to provide partial support for start-up packages for the new tenure-track faculty to be hired in the next hiring cycle. Recruitment of a high-caliber faculty, as well as their subsequent professional development, critically depend on a healthy initial (start-up) support. This support enables new faculty to establish their research/creative endeavor programs at SDSU, including seeking extramural funding for their professional activities. The requested funds will be combined with other sources (e.g., one-time savings from separations, college funds) to provide start-up packages to new hires. |
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| Research Support (subtotal) | \$725,000 |
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| 2. MATCHING GRANT FUNDS | \$400,000 | Many funding agencies require matching funds from institutions seeking extra-mural funding for the proposed research projects or research equipment requests. Funds are requested to enable SDSU researchers to compete for resources when matching funds are required. Interest for such funds far exceeds the requested 400k; however, should the request be approved, funds would be selectively allocated on a competitive basis. |
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| 3. RESEARCH FACULTY BRIDGE FUNDING | \$150,000 | In the hyper-competitive extramural funding environment, it is not unusual even for faculty members with a good record of securing extramural support for their research to find themselves completing a cycle of funded research while still searching for additional funds. Given that prior history of funding is a good predictor of success in obtaining new funding, it is reasonable to provide support for faculty members in between grants to keep their research active. Our experience in doing so confirmed that such investments typically yield positive outcomes. Hence, funds are requested to provide bridge funding for faculty members in between grants. |
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| 4. RESEARCH FACULTY ASSIGNED TIME | \$125,000 | In an effort to facilitate grant seeking for larger, inter-disciplinary projects, we request funds that would provide release time at the AUAT for the involved faculty members. This resource would be made available to faculty members of a competitive basis. |
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| 5. GRADUATE RESEARCH GRANT WRITING PROGRAM | \$50,000 | Funds are requested to continue a pilot program instituted last year aimed at enhancing opportunities for graduate students to secure their own funding. Funds will be used to implement workshops targeting external graduate student funding opportunities, including funding agencies and foundations (e.g., NEA, NIH, NSF, EPA, Start), as part of an effort to help develop a sustainable graduate funding model. Two pilot models will be evaluated for efficacy: a) department-specific workshops organized in collaboration with a faculty member, and b) competitive cohort-based workshops targeting specific funding agencies (e.g., NSF=GRF Program). |
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| One-Time (Total) | | \$11,347,700 | |
| Transformative Educational Experience (subtotal) | | \$344,000 | |
| 6. UNDERGRADUATE RESEARCH PROGRAM | \$200,000 | | Funds are requested in support of the faculty-mentored AY undergraduate research program (\$50K) and summer undergraduate research program (\$150K). These programs provide monetary support for participating students and AUAT for participating faculty mentors. These one-time funds will be used in conjunction with previously allocated base funds (\$50K) to facilitate the involvement of undergraduate students in the hands-on, intensive research practice. |
| 7. EXPANSION OF STUDENT RESEARCH SYMPOSIUM | \$44,000 | | Student Research Symposium (SRS) has evolved as one of the signature high-impact educational experiences for a significant number of undergraduate and graduate students. Expansion of the SRS is associated with increasing operating costs. Hence, funds are requested to cover the costs thereby facilitating participation of a greater number of students in the Symposium. |
| 8. SUPPLEMENTAL INSTRUCTION | \$100,000 | | Funds are requested to continue and expand the SI program from four to seven high-challenge courses. The program has proved very successful in increasing student success in these course as evident in a reduction of the percentage of DFW grades in the participating courses. Most (about 70%) of the requested funds will provide support for the SI leader students compensation, with the remaining funds supporting SI coordinator and covering operational and assessment activities. |
| Facilities and Technology Enhancement (subtotal) | | \$3,250,000 | |
| 9. SUMMER SMART TECHNOLOGY UPGRADES | \$500,000 | | Enhancement of facilities and technology is one of the strategic goals, ultimately meant to improve educational experience for our students. Funds are requested to support technology upgrade in academic classrooms in Summer 2018. |
| 10. CLASSROOM AND TEACHING LABORATORY RENOVATIONS | \$2,500,000 | | Classroom and teaching renovations are needed on an on-going basis in order to keep up with technology advancements. This need is especially acute in regards to high-demand courses. Hence, funds are requested to renovate teaching laboratories and increase teaching capacity for high demand courses. |
| 11. LIBRARY OUTDOOR SEATING | \$250,000 | | The Library provides one of the most important learning space outside of the classroom. During the past five years, the Library has increased the number of public seats from 3,032 public seats to 4,000; however, the seating is still below the CSU standard of 20% of the undergraduate student population. Activating outdoor seating would add up to 150 seats and create additional collaborative and individual learning spaces. |
| Provost Initiatives (subtotal) | | \$225,000 | |
| 12. PROVOST MILESTONE AWARD | \$100,000 | | The Provost's Innovation for Excellence (Milestone) Award recognizes academic departments that have, through collaborative effort implemented a new initiative that has generated new momentum toward achieving one or more of the key goals of the Strategic plan -- Student Success, Research and Creative Endeavors, and Community Engagement. One to five awards, ranging from \$10k to \$50k, are given to departments or schools, which can use them for programmatic support, professional development, equipment or other activities in support of the academic mission of the University. |
| 13. VISITING SCHOLARS | \$75,000 | | The Visiting Scholars program brings to campus leading figures in the areas of arts, humanities and sciences, thereby affording our students and faculty transformative experiences of interacting with the individuals who are shaping the world. The program aims to invite one leading scholar to campus per semester by soliciting nominations from all academic units. Funds are requested to cover the costs associated with organization of such visits. |
| 14. PROVOST UNDERGRADUATE MENTORING PROGRAM (PUMP) | \$50,000 | | The Provost Undergraduate Mentoring Program (PUMP) is a collaboration between the Offices of the Provost and the VP SA, which is intended to promote the retention and graduation rates of SDSU's undergraduate and transfer students by assigning students to faculty mentors and providing students, across their academic careers, with the tools needed to graduate from college and pursue further professional development. Funds are requested to support the program's activities, including faculty-student mentee pairing, development and maintenance of the program web page, organization of thematic workshops, symposia, and similar activities. |

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| One-Time (Total) | | \$11,347,700 | |
| Critical Support Needs (subtotal) | | \$4,803,700 | |
| Enrollment Growth Support (subtotal) | | \$2,940,000 | |
| 15. 2016-17 Enrollment Growth (1400 FTES) | \$2,940,000 | Funds are requested to cover the cost of additional instructional efforts needed to accommodate increased enrollment. In the AY 2016-17, a total of 2800 FTES were not funded. Marginal funding for 2800 FTES or 63.4 lecturers (assuming 44 students in each of the additional sections) is \$5.88M, based on the average cost of \$92K per lecturer (salary plus benefits). At present, we are requesting funds to cover half of these costs, with another half (another \$2.94M) to be allocated in Spring 2018. | |
| Student Achievement (subtotal) | | \$682,500 | |
| 16. UNIVERSITY GRADUATE FELLOWSHIP (UGF) | \$500,000 | These one-time funds are requested to supplement a base allocation in securing about 25 fellowships per year (arguments in support of the fellowship program are in the narrative for the base funding portion of the request). | |
| 17. DUS STUDENT ACHIEVEMENT INITIATIVES | \$32,500 | Funds are requested to support multifaceted DUS activities aimed at improving retention, timely graduation, and decreasing time to degree. These funds would support a) Workshops for undeclared students to facilitate their informed declaration of a major (\$7.5K), b) Transfer student outreach alliance to connect new transfer students to campus resources and provide support in their academic and social transition to SDSU (\$5K), c) Sage collaboration to support the continued collaboration with the City of Tijuana, Mexico, through the program Comuniparques (\$5K), and d) BeHIP! student conference to engage students in early planning for experiential learning (\$15K). | |
| 18. SDCC FUNDS FOR REMEDIAL INSTRUCTION | \$150,000 | San Diego Community Colleges provide remedial instruction to SDSU students. This request is for the funds to offset the costs of the remedial instruction, which has proven academically efficient and fiscally sound. | |
| Subscriptions and Equipment (subtotal) | | \$827,000 | |
| 19. LIBRARY SUBSCRIPTIONS | \$400,000 | These one-time funds, in conjunction with the base funding (please see the base funding requests) are intended to strengthen the Love Library capacity to provide students, faculty, and staff with access to major outlets in their disciplines used in teaching, research, or both. | |
| 20. NATIONAL CENTER FOR FACULTY DIVERSITY AND DEVELOPMENT (NCFDD) MEMBERSHIP AND INSIDE HIGHER EDUCATION (IHE) SUBSCRIPTION | \$116,000 | In order to facilitate the efforts toward recruitment and professional development of underrepresented faculty, funds are requested to cover the costs of a 5-year membership in the National Center for Faculty Diversity and Development (\$96k). This multi-year membership comes at a 20% discount rate for the first year and a guaranteed unchanged rate in the subsequent four years. Last year was the first year of our membership in the NCFDD and a total of 253 faculty members, underrepresented and non-underrepresented, made use of this resource. Additional funds (\$20K) are requested for annual subscription to IHS, a national publication widely used for posting academic position vacancies. | |
| 21. EQUIPMENT MAINTENANCE | \$311,000 | Funds are requested to maintain large equipment in order to extend their lifetime and functionality for cost savings. Although such equipment can be found in most colleges, it is concentrated in the College of Health and Human Services (e.g., nursing program, Engineering (all programs), PSFA (e.g., arts), and Sciences (most programs)). | |
| Program and Operations improvements | | \$354,200 | |
| 22. GENERAL EDUCATION PROGRAM REFORM | \$45,600 | Funds are requested to support a WASC recommendation to review and improve general education. To support an in-depth review of the current General Education plan, funds are requested to hire a graduate student a period of 12 months to assist with the effort, attendance of a specialized conference on general education for members of the Steering Committee, and organization of workshops on general education. | |
| 23. NEW REGISTRATION TIMELINE SUPPORT | \$249,600 | Moving to an earlier registration timeline requires substantive changes in the related operations in the Enrollment Service. Current staff in the unit are fully assigned to other time-sensitive project; hence, a need for a temporary, one-year position to manage the project, overseeing its development, designing and documenting current and future business projects and developing of actionable specifications for programming. It is anticipated that a highly skilled specialist in this position will be needed for a total of 2080 hours at an estimated rate of @130/hour. | |

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| One-Time (Total) | \$11,347,700 |
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| 24. CENTER FOR TEACHING AND LEARNING | \$59,000 | Funds are requested to extend current appointment of the CTL Director from 0.5 to 1.0 AY plus 2 summer months to enable an expansion of programs aimed at engaging faculty in multifaceted activities to promote student success. Current level of appointment (0.5) does not allow for systematic planning and execution of a more focused faculty-centered activities and organizational re-thinking of the CTL, including establishment of Advisory Board. |
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SDSU
BFA PBAC Requests

| Strategic Planning Initiatives | 2017/18 One-Time | 2017/18 Base |
|--|---------------------|------------------|
| Public Safety - CRO | | \$136,500 |
| Subtotal Business & Financial Affairs | <u>\$0</u> | <u>\$136,500</u> |
| Critical Support Needs | | |
| Business & Financial Affairs: | | |
| EH&S - Chemical Inventory Tracking Software | \$75,000 | |
| Public Safety - CSO | \$100,000 | |
| Public Safety - Threat Assessment | | \$133,160 |
| Public Safety - Dispatch Equity | | \$51,000 |
| Public Safety - SUPA Equity | | \$36,000 |
| Public Safety - Dispatch | \$95,000 | |
| Emergency Preparedness - Director & OE&E | | \$200,000 |
| Student Account Services - New Registration Timeline Support | \$120,000 | |
| Facilities Services - Maintenance Contracts | | \$100,000 |
| Facilities Services - Buyer/Analyst | | \$100,000 |
| Subtotal Business & Financial Affairs | <u>\$390,000</u> | <u>\$620,160</u> |

Business & Financial Affairs – 2017/18 Budget Requests

BASE FUNDING REQUESTS:

University Police – CRO - \$136,500 base strategic need

In 2015, the Department handled almost 41,000 calls for service and executed 536 arrests. This is roughly 112 incidents per day. When our patrol officers are typically handling calls for service and arresting offenders, they have little time for positive proactive community interactions.

Community policing is a holistic approach with respect to cultivating community relationships in order to help mitigate crime, build legitimacy and trust between the police and the community, and orchestrate sustainable partnerships.

Our Community Resource Officer leads our community outreach and community policing efforts. This position was funded one time for three years in FY1415. University Police is requesting the CRO position become permanent. The inability to fund this position on a full-time, permanent basis would be catastrophic to our community policing efforts. Below is a sample of work in this critical area.

- Active shooter training – 43 training courses offered last year
- Crime Prevention Through Environmental Design (CPTED) – conducted an assessment on nearly every campus building and at the request of over 34 individual departments last year
- Attends monthly community meetings to include College Area Community Council, Del Cerro Community Council, College Area Regional Public Safety meeting
- Serves as the Public Information Officer (PIO) for the department
- Police liaison for all residential education trainings and meetings
- Attends all new student orientations
- Coordinates SDSUPD involvement in countywide community events, including Pride Parade, MLK Parade, Shop with a Cop, Teddy Bear Drive, National Night Out, Special Olympics,
- Works closely with MARCOMM in jointly addressing community needs
- Provides resources to the Greek Life
- Serves as the point of contact for Aztec Nights planning and events
- Works directly with local councilmembers on quality of life issues in the area
- Chairs and coordinates the Community Engagement Group for the police department
- Works directly with community and student groups on safety and security issues
- Instrumental in furthering my goals for police-community relations and partnerships

University Police – Threat Assessment - \$133,160 base critical need

Business & Financial Affairs – 2017/18 Budget Requests

The newly formed threat assessment team (TAT) was created to properly track, investigate, and manage cases related to threats to our community. The TAT focus surrounds three main areas, including terrorism, mental health cases, and active shooter/violent reactions. The TAT was created to help mitigate these threats due to an uptick in cases, and a lack of resources available to patrol officers.

Our threat assessment team consists of three officers. These officers, however, handle this caseload while managing their regular patrol duties. This model is unsustainable. The average threat assessment investigation is time intensive and requires many hours of follow-up, including close and accurate communication with everyone involved. The TAT currently has over 20 open investigations. For these reasons, University Police is requesting an additional officer position to manage these cases on a full-time basis.

University Police – Dispatcher/Officer Equity - \$87,000 base critical need

\$51,000 for Dispatchers and \$36,000 for Officers are requested to support equity increases in order to retain and hire top-quality, experienced dispatchers and officers. The request includes applicable benefits.

Emergency Preparedness and Clery Reporting – Director & OEE - \$200,000 base critical need

Funding is requested to support a position to oversee campus emergency services and Clery Act reporting. With the number of both emergency incidents and the threat of such incidents increasing (e.g. man with gun running from police on campus property, flooding at the Children's Center, etc.), the workload and level of expertise associated with emergency services has increased. The university must appropriately manage such incidents and we have a duty to provide training programs for faculty and staff to ensure that they know how to respond in the event of an emergency. There is a demonstrated need for a position responsible for the management of emergency incidents and campus preparation. In addition to this need, pursuant to the recently issued Executive Order 1107, the university is required to have a "Clery Director" responsible for directing, collaborating and coordinating Clery Act reporting and compliance for the campus and to serve as the "Campus Safety Survey Administrator." Pursuant to the EO, this position cannot report within the University Police Department. SDSU's Clery reporting and compliance has always been handled by police personnel (in addition to other duties) and therefore, the university must hire a new position to meet the requirements of the EO. These duties can be combined with the duties of the emergency preparedness/services position.

Facilities services - Fire Dampers Inspection - \$100,000 base critical needs

In recent years, Facilities Services has needed to meet new compliance requirements, particularly in the areas of fire and elevator safety. The most recent will require \$100,000

Business & Financial Affairs – 2017/18 Budget Requests

per year to conduct ongoing inspections of fire dampers in the buildings, which are critical building components to control the spread of smoke and fire.

Facilities Services is requesting \$100,000 in base funding to meet these requirements.

Buyer/Analyst for Facilities Services - \$100,000 base critical need

As Facilities Services has ramped up maintenance and repair of the campus, combined with the amount of ongoing construction projects in Planning, Design and Construction, a significant bottleneck has resulted in the procurement of goods and services to keep pace with this new focus. These contracts are complex, involving public works, bid documents, JOC, TOCA and other procurements methods, which require a significant level of expertise. The current lack of support in this area is resulting in project delays, some of which result in missing construction windows, higher costs and backlogs in addressing and completing work orders.

We are requesting that an additional procurement position be funded, reporting to Procurement and Contract Services. This position would work directly with Facilities Services and Facilities Planning to alleviate the procurement bottlenecks, achieve cost savings through more competitive pricing and provide a more streamlined and efficient approach to the contracting and procurement aspects associated with maintenance, repair and construction at SDSU.

ONE-TIME FUNDING REQUESTS:

EH&S – Chemical Inventory Tracking Software - \$75,000 one-time critical need

To meet regulatory requirements, the university is required to inventory all chemical stored in buildings. Under fire codes, there are limits to the amounts of certain chemicals in certain rooms and sections of campus buildings. To ensure full compliance with regulatory requirements and to provide a user friendly inventory and tracking system that can be used by all laboratories, Environmental Health and Safety will be purchasing a software system for campus usage. The software system provides an extensive classified reference database, robust searching and reporting, access to best management practices. The inventory tracking provides tracking down to bay/bench, shelf, and cabinet level and also provides a reference database of 36,000 classified chemicals/mixtures + 117,000 synonyms which allows for searching by hazard, regulation, storage segregation code, and more. The software also creates extensive regulatory and compliance reports. Additional funds will be used to assist in the customization of the system to meet specific university needs and to assist in the software roll-out, including training of EHS staff and laboratory faculty and staff to ensure comprehensive usage of the software.

University Police – Community Service Officers (CSO) - \$100,000 one-time critical need

Business & Financial Affairs – 2017/18 Budget Requests

This proposal includes increased resources for the Community Service Officer (CSO) program. This includes focusing on increasing the visibility and services of our CSOs. As students, CSOs have a vested interest in ensuring that SDSU is a safe environment that fosters the academic process. A CSO's purpose is to support law enforcement personnel by being a visible deterrence to criminal activity, while observing and reporting suspicious activity. They provide services that ensure the safety of our campus and further relationships between our campus community and law enforcement.

This proposal is in support of the requests for a more robust safety escort program in light of recent criminal activity. This proposal allows for a strong visibility of CSOs on campus and in parking structures. Likewise, increasing our staffing numbers would drastically reduce wait times related to the safety escort program.

The minimum wage increases, loss of priority registration, and the required late working hours impact our ability to recruit and fill the CSO positions.

Increase uniformed student employment: Increasing staffing numbers seven days a week will increase the University Police Department's presence, allow police officers to remain active in the field, and will support our efforts in community policing.

- Current Staffing: 30 CSOs, 10 of which will graduate in May of 2017.
- Need: Recruitment, hiring and training of 20 new student employees to meet the minimum requirement needed to reach goals of increased visibility and reduction of wait times. This will be accomplished by implementing an assigned beat system.

Increase Salary: CSOs have not realized an increase in pay in over four years. In order to remain competitive and to recruit and retain students who are required to work up until 3:00 am, we are requesting funding to increase student salaries. We have a rank system that includes Supervisors, Field Training Officers and CSOs, with varying pay associated with each rank.

Ongoing Costs/Base Building: To achieve our goals, we are proposing an increase of \$100,000 annually in order to accommodate the recommended pay scale and increased staffing model.

Benefit to the University: The CSO Program promotes safety by increasing visibility and creating a larger geographic footprint for crime deterrence. CSOs work in conjunction with our police officers in helping to address areas of concern by adding a considerable presence to prevent future occurrences. Our proposal will increase the total hours of escort services from our current six CSOs per night (a total of 36 hours of coverage) to 14 CSOs per night (a total of 84 hours of coverage) which operates seven days a week.

In addition, we would be able to continuously recruit for our contracted shifts; including the Library Closure, Library Shuttle, Red and Black Shuttle and late night escorts that operate until 2:30 am. The beat system (which requires 30 CSOs) will ensure that CSOs are assigned to specific locations on campus and will operate on bicycles to considerably reduce wait times. Likewise, CSOs will be trained in some aspects of Active Shooter, Counterterrorism, Community Policing, Communication, and Sensitivity Training to be further utilized for emergency preparedness/response and community relation efforts.

Business & Financial Affairs – 2017/18 Budget Requests

Public Safety Dispatcher - \$95,000 one-time critical need

This is a continuation of the one-time funding approved in 2015/16 and 2016/17 to support dispatchers as we continue to explore ways to minimize costs. In the past, police officers provided coverage to our dispatchers during meal and rest breaks. Pursuant to state and federal requirements, only specially trained personnel are allowed to answer 911 calls received in Public Safety's dispatch. As such, our police officers who do not have the 60 hours of specialized training can no longer provide coverage for meal and rest breaks. Now we must staff our 24/7 dispatch center differently and require a minimum of three additional dispatch positions. Failure to provide breaks is a violation of the collective bargaining agreement and could result in significant penalties. Public Safety continues to explore the possibility of creating a regional dispatch center with area law enforcement agencies.

Student Account Services - New Registration Timeline Support - \$120,000 one time critical need

Student Account Services is requesting to hire two new positions for one year to handle the transition of the current registration time line to an earlier one. This is part of a campus wide initiative.

Accounting Tech III (AT III)

Current Process:

As the sole AT III within Student Account Services, this position is responsible for; the billings and collections of all 3rd party agencies for student tuition and fees each semester, applying waivers to student accounts, overseeing outgoing and incoming exchange programs and generating monthly billing statements to all students owing funds to the university. Due to the complexities of applying waivers on all of the various 3rd party agencies, manual adjustments must be made to each student account which amounts to roughly 4500 students per semester. Decisions made by this incumbent require independent judgment and persistence, along with expertise in policy to determine a course of action.

Impact of Registration Timeline:

Based upon the new registration timeline and the overlapping of semesters, the time available to complete all of the job duties listed above would be greatly reduced. This reduction in processing time could lead to increased errors on student accounts and

Business & Financial Affairs – 2017/18 Budget Requests

ultimately effect the student registration. Lots of additional overtime hours would also be required to process each student's 3rd party billing or waiver in time for registration. Following each students registration for each semester, students who receive additional financial aid, must have their waiver processed prior to financial aid being disbursed to their account, which begins 10 days prior to the start of each semester. Communication will also need to be sent to students and each 3rd Party Agency informing them on the importance of submitting their documents prior to their registration. Furthermore, due to increased number of installments from 2 to 4 per semester, the amount of students bills generated each semester will be increased significantly.

Justification of Position:

An additional AT III position is requested to ensure timely processing of waivers and 3rd party billings on student accounts in time for each students assigned registration date as well as processing the current semester billings and waivers. This will be implemented by splitting the work by letter group. Communications will also be sent to 3rd Party Agencies as well as students to remind them of the change in timeline and the importance of submitting documentation earlier so that waivers can be processed prior to registration. The incumbent AT III would also be responsible for reconciling and the accurate billing of all students on campus.

Accounting Tech II (AT II)

Current Process :

This position within Student Account Services is responsible for assisting students, parents, customers, and other university staff with student inquiries and resolving problems related to the students account. This interaction involves a high volume of questions related to payments, refunds, financial aid, billings or any other issue related to a student account. The position is also responsible for processing refunds, printing checks, performing reconciliations, running reports, printing bills and statements and other similar tasks within Student Account Services.

Impact of Registration Timeline:

It is anticipated that there will be an increased volume of calls from students and parents inquiring about the overlap between semesters. There is also a possibility that there will be an increased number of students who aren't able to pay off their current semester fees prior to registering for the upcoming semester, resulting in an increased amount of outstanding receivables. The amount of refunds may also increase due to students paying for an upcoming semester but not fulfilling academic requirements needed to continue their degree program.

Justification of Position :

The additional AT II will be utilized to trouble shoot any student related issues regarding the changes in the registration timeline as well as assisting with outbound phone calls to

Business & Financial Affairs – 2017/18 Budget Requests

students who owe an past due balances. The position could also assist with the increased refund volume to ensure that refunds are processed back to the student in a timely manner. Additionally based on the new loan program that will be offered to students, this new position could assist in administering the loan process to students.

SDSU

Institutional PBAC Requests

| Strategic Planning Initiatives | 2017/18 One-Time | 2017/18 Base |
|---|-----------------------------|-------------------------|
| Institutional: | | |
| SSF ARP Coordinator (joint request by Academic Affairs and BFA) | | \$82,188 |
| Staff Professional Development (across the University) | \$250,000 | |
| Enhancing Campus Climate and Culture (ECCC) initiatives | \$500,000 | |
| Subtotal Institutional | <u>\$750,000</u> | <u>\$82,188</u> |

Critical Support Needs

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| Institutional: | | |
| SDSU Research Foundation | \$1,000,000 | |
| Worker's Compensation (Year 3 of 4) | \$700,000 | |
| Painting | \$500,000 | |
| Window Washing | \$75,000 | |
| HVAC Replacement - North Life Sciences/Education | \$2,500,000 | |
| College Way - Pedestrian Improvement Project | \$500,000 | |
| Veteran House - Rent (for 3 years) | \$90,000 | |
| Subtotal Institutional | <u>\$5,365,000</u> | <u>\$0</u> |

Institutional – 2017/18 Budget Requests

BASE FUNDING REQUESTS:

Student Success Fee – Academic Related Program (SSF-ARP) Coordinator - \$82,188 base strategic need

This is a joint request by Academic Affairs and BFA. A portion (10%) of the Student Success Fee revenue is allocated toward student-initiated academic-related projects intended to enhance students' educational experience. Awards to support these projects are allocated on a competitive basis through the multi-step, student-driven process that involves proposals' evaluation at a college level followed by two stages of a university-level evaluation. Execution of the awarded projects requires a careful guidance of the students through the fiscal and academic procedures in a coordinated effort that involves multiple AA and BFA units. The logistics of the process requires a full time staff dedicated exclusively to the required coordination to optimize the impact of the SSF-ARPs. Funds are requested to support a permanent position.

ONE-TIME FUNDING REQUESTS:

Institutional – Staff Professional Development - \$250,000 one-time strategic need

This is a continuation of one-time funding for staff professional development supporting the campus and communication strategic initiative. The funding is used to support individual professional development trainings at a divisional level. Staff professional development is important for the professional growth and retention of our employees. During budget cuts, many departmental discretionary budgets were cut and, as a result, departments do not have the resources to pay for trainings. This funding will better support management and staff.

Institutional – ECCC - \$500,000 one-time strategic need

This allocation will accomplish a variety of barrier removals across the campus and will augment projects to leverage other funds for infrastructure improvements.

Campus Wide Site Access

This will complete the first phase of barrier removals noted in the campus wide survey of parking and paths of travel, with the remainder used to begin work on a second phase of barrier removals to paths of travel.

Barrier Removals to Support projects

A portion of each ECCC allocation is set aside to leverage project funding where there is an opportunity to remove additional barriers related to the project area. A good example is the restroom renovation which was done at Student Services West to provide accessible restrooms for the Page Pavilion project.

Institutional – 2017/18 Budget Requests

The specific scope of each of these projects will be coordinated with the campus groups below to both ensure major issues are identified and prioritized, as well as the ensuring the specific projects accomplished address immediate priority needs for campus access.

- Enhanced Campus Climate and Culture for Persons of Varying Abilities working group (ECCC), which is also working on surveys, training and events related to the current campus culture and awareness
- Disability and Accessibility Compliance Committee
- Student Disabilities Services staff and the Advisory Council

By June 30th, 2017, we provide an update on projects accomplished with past funding, many of which were recently completed and are in the billing process.

Institutional – SDSU Research Foundation - \$1,000,000 one-time critical need

The FY 2017/18 proposed budget for SDSU Research Foundation has improved and revenues from Facilities & Administrative recoveries are expected to increase gradually. As the efforts to recruit more active researchers to SDSU continue, proposal submissions, awards, F&A and expenditure rates will increase.

SDSU Research Foundation management has a multi-year strategy to address the decline in operating revenue using a combination of reserves, selective staff reductions and enhanced service initiatives. This plan is closely tied to the university's strategic plan to recruit active researchers and enhance the research infrastructure. Although the initial budget projections for FY 2017/18 requires no reserve to balance the FY 2017/18 Budget, the research foundation's discretionary reserves were used to balance budgets in previous years and have been depleted too quickly.

SDSU Research Foundation is requesting a waiver of \$1 million in certain allocations provided to the university for FY 2017/18 so that its reserves can be stretched over several years, allowing time for the investments in research to materialize. These allocations were costs historically assumed by the university but shifted to the research foundation in FY 2009-10 during the university's budget crisis.

Institutional – Worker's Compensation Insurance Premium - \$700,000 one-time critical need

Due to a variety of factors, including increased personnel costs, claims experience and increased cost of medical care, SDSU's workers compensation premium increased by \$700,000 beginning with FY 2015/16. Pursuant to the formula utilized in determining the premium, we anticipate that this increased cost will continue for a minimum of four and this is to request year three of funding to support this increased cost.

Institutional – Painting - \$500,000 one-time critical need

Many building exteriors have been painted or are currently in the process to be painted and interior common area spaces such as hallways, stairwells, lobbies and many

Institutional – 2017/18 Budget Requests

classrooms have been painted with this money as well. Painting has also been accomplished on our exterior handrails and benches refreshing outside community areas. This money has truly transformed the look of this campus showing students, staff and visitors alike SDSU is as pretty on site as it is in the brochures.

With another \$500,000 FS plans to paint the next round of building exteriors that need attention; Fowler Athletic Center, Peterson Gym and the Police department. This area is heavily trafficked by a significant number of guests and students throughout the year. As more of the exterior of SDSU refreshed, heavy focus will be on the interior spaces. While much has been done, many of the areas that were painted in the last three years are beginning to show signs of wear. Time will be spent touching up much of the interior spaces as well as getting to more classrooms, more hallways, more labs, more stairways and more restrooms.

To do this interior painting FS is looking to augment its current staff with the hiring of another temporary painter. This will bring the number of temporary painters to three that PBAC is funding.

Institutional – Window Washing - \$75,000 one-time critical need

The window-washing effort funded by PBAC has been a great success with occupants everywhere providing positive feedback on how the overall appearance of those buildings was improved.

With some buildings remaining to be cleaned, along with keeping up with buildings already completed, Facilities Services is requesting \$75,000 to embark on the first year of a yearly maintenance program where buildings receive a regular cleaning. Some buildings, such as the Library, with its prominent glass features with receive the cleaning four times per year.

Institutional – College Way Pedestrian Improvements - \$500,000 one-time critical need

In recent year, SDSU students, staff, and faculty have experienced an increase in personal threats and property damage associated with gang activity, transients, and other criminals on the campus edges. The alley on College Way is significant thoroughfare for off and on-campus students walking to and from campus. This alley is currently in disrepair and in need of additional security measures to mitigate future incidents.

This project is intended to improve the safety and security of College Way alley. The scope of the project would include improved path of travel, additional LED lighting, enhanced security camera coverage, upgrades to driving surfaces, and additional parking for students, faculty and staff visiting the tenants of College Square.

The timing of this project would be in alignment with other current campus projects in the area. As such, \$500,000 in one-time funding is requested to support the total project costs. This contribution will be leveraged as OHA will provide a matching contribution of \$500,000 to complete the scope. The total project is estimated to cost \$1 million.

Institutional – 2017/18 Budget Requests

Institutional – Veterans House Lease (3 years) - \$90,000 one-time critical need

The 2013/14 budget provided funding to support 4 years of rent for the Veterans House. This request is to provide an additional 3 years of rent (2017/18 – 2019/20). The Veterans House provides military affiliated students with a space for meetings, workshops and events.

Institutional – HVAC Replacement – North Life Sciences/Education - \$2,500,000 one-time critical need

During the 2016/17 fiscal year, Facilities Services engaged P2S Engineering to evaluate the condition of the HVAC systems across campus with specific attention placed on the condition of the air handlers in campus facilities. The air handlers are the central core of the building HVAC systems that provide heating and cooling as needed to provide a comfortable and safe temperature, as well as provide air circulation in the buildings.

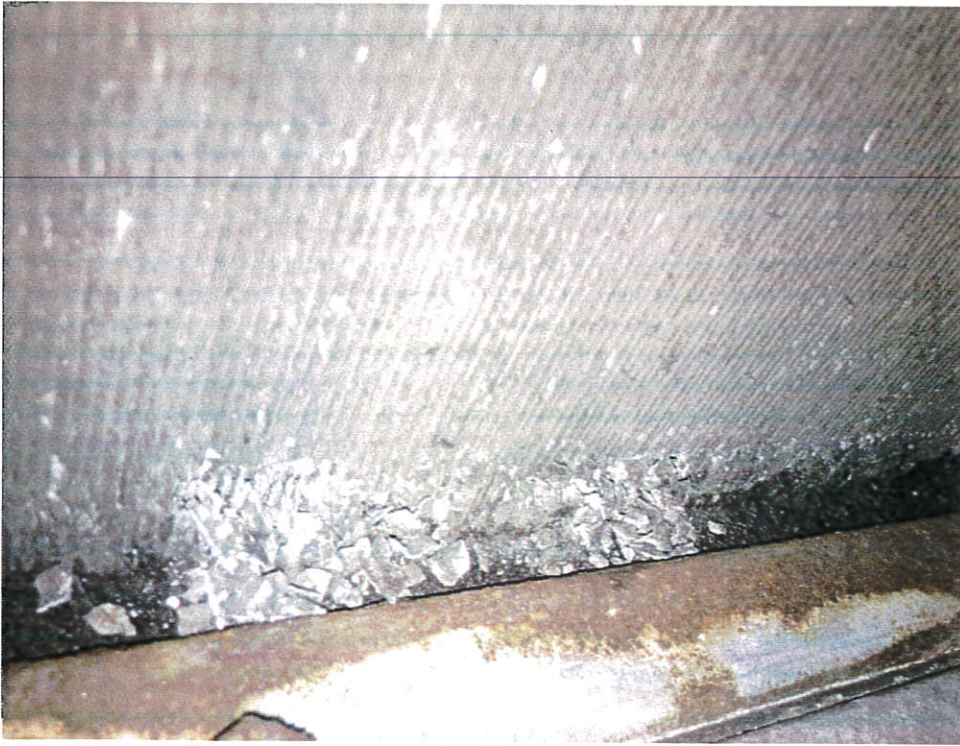
The good news from the report is that over 80% of the existing air handlers on campus can be addressed through increased preventative maintenance and in-house repair, which Facilities Services is currently addressing.

There were, however, approximately 30 air handlers that are beyond repair and need to be replaced, which have been prioritized over a 5-year period. These units have reached a point well beyond their useful life where their materials have degraded to the point where they cannot be salvaged. This results in potential safety hazards in mechanical rooms, an inability to control humidity and air quality to desired levels in buildings and a significant waste of energy. These units are also at risk of complete failure, which could result in a negative impact to the programs operating in those buildings.

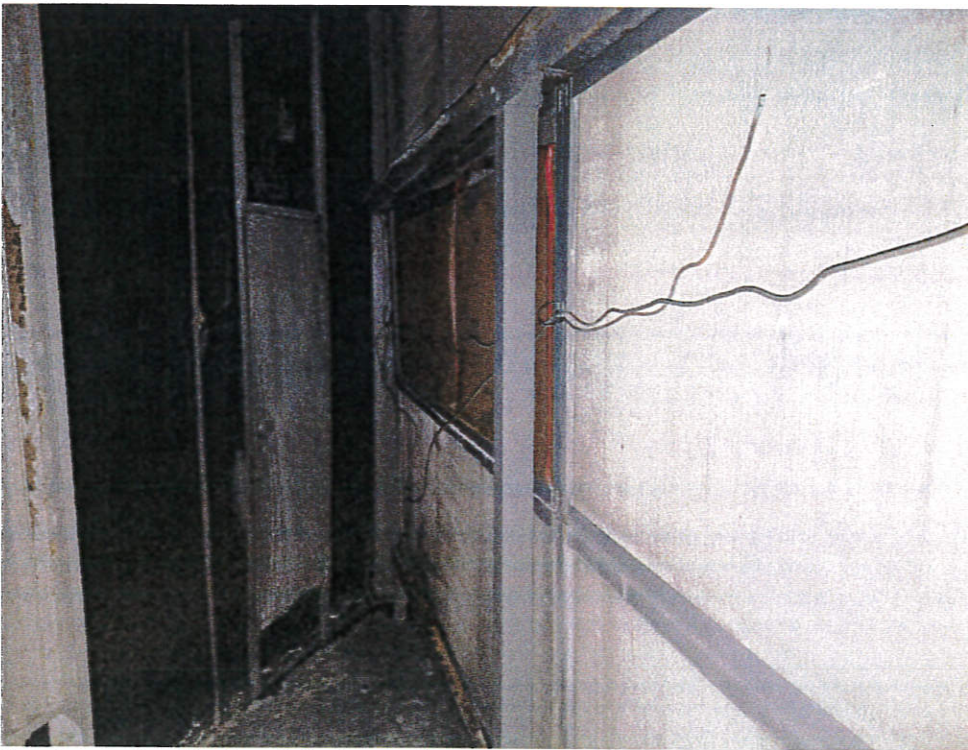
All the air handlers in North Life Sciences, as well as one air handler in North Education have been identified as the air handlers in the most immediate need of replacement for the first year of this effort, with an estimated project cost of \$2,500,000.

Attached are pictures from one of the air handles in North Life Sciences to provide a visual example of the condition of these units.

Institutional – 2017/18 Budget Requests



Degrading cooling and heating coils / fins.



Sections of coils that failed, resulting in major water leaks (orange section), which were blocked off and bypassed and now result in a loss of cooling and heating capacity.

Institutional – 2017/18 Budget Requests



Base of air handler unit completely corroded and rusted out.



Holes in the intake ducts that result in cooling and heating loss.

Institutional – 2017/18 Budget Requests



Due to the bases of the air handlers being rusted out, condensation water from the cooling coils collects on the floors of the mechanical rooms. In this case standing water is approaching a high-voltage electrical panel.

2017/18 Integrated Budget Proposals -- Consolidated

| Strategic Planning Initiatives | | | | | | |
|---|-----------------------------------|--|--------------------|-------------------------------|------------------------------------|----------------------------------|
| (1) | (2) | (3) | (4) | (5) | (6) | (7) |
| 2017/18 One-Time | 2017/18 Encumbered One-Time | Cumulative One-Time (Cols 1 + 2) | 2017/18 Base | 2017/18 Encumbered Base | Cumulative Base (Cols 4 + 5) | 2017/18 TOTAL (Cols 3 + 6) |
| Academic Affairs: | | | | | | |
| Tenure-Track Faculty Hiring | | \$0 | \$1,500,000 | | \$1,500,000 | \$1,500,000 |
| Tenure and Promotion | | \$0 | \$399,055 | | \$399,055 | \$399,055 |
| Library Funding | | \$0 | \$100,000 | | \$100,000 | \$100,000 |
| Matching Grant Funds | \$400,000 | \$400,000 | | | \$0 | \$400,000 |
| Research Faculty Bridge Funding | \$150,000 | \$150,000 | | | \$0 | \$150,000 |
| Research Faculty Assigned Time | \$125,000 | \$125,000 | | | \$0 | \$125,000 |
| Graduate Research Grant Writing Program | \$50,000 | \$50,000 | | | \$0 | \$50,000 |
| Undergraduate Research Program | \$200,000 | \$200,000 | | | \$0 | \$200,000 |
| Expansion of Student Research Symposium | \$44,000 | \$44,000 | | | \$0 | \$44,000 |
| Supplemental Instruction | \$100,000 | \$100,000 | | | \$0 | \$100,000 |
| Library Outdoor Seating | \$250,000 | \$250,000 | | | \$0 | \$250,000 |
| T/TT Faculty Start-up (Areas of Excellence) | \$2,000,000 | \$2,000,000 | | | \$0 | \$2,000,000 |
| Summer SMART Technology Upgrades | \$500,000 | \$500,000 | | | \$0 | \$500,000 |
| Classroom/Teaching Laboratory Renovations | \$2,500,000 | \$2,500,000 | | | \$0 | \$2,500,000 |
| Provost Milestone Award | \$100,000 | \$100,000 | | | \$0 | \$100,000 |
| Visiting Scholars | \$75,000 | \$75,000 | | | \$0 | \$75,000 |
| Provost Undergraduate Mentoring Program | \$50,000 | \$50,000 | | | \$0 | \$50,000 |
| | \$0 | \$0 | | | \$0 | \$0 |
| Subtotal Academic Affairs | \$6,544,000 | \$6,544,000 | \$1,999,055 | \$0 | \$1,999,055 | \$8,543,055 |
| Student Affairs: | | | | | | |
| EOP Summer Bridge | | \$0 | \$47,000 | | \$47,000 | \$47,000 |
| International Student Transition & Retention | | \$0 | \$110,167 | | \$110,167 | \$110,167 |
| Peer Commuter Academic Mentoring Program | | \$0 | \$250,000 | | \$250,000 | \$250,000 |
| Black Resource Center Renovation | \$500,000 | \$500,000 | | | \$0 | \$500,000 |
| OFAS Renovation | \$800,000 | \$800,000 | | | \$0 | \$800,000 |
| Subtotal Student Affairs | \$1,300,000 | \$1,300,000 | \$407,167 | \$0 | \$407,167 | \$1,707,167 |
| Business & Financial Affairs: | | | | | | |
| Public Safety - CRO | | \$0 | \$136,500 | | \$136,500 | \$136,500 |
| Subtotal Business & Financial Affairs | \$0 | \$0 | \$136,500 | \$0 | \$136,500 | \$136,500 |
| University Relations & Development: | | | | | | |
| Brand & Marketing | | \$0 | \$150,000 | | \$150,000 | \$150,000 |
| Institutional Television Spot | \$100,000 | \$100,000 | | | \$0 | \$100,000 |
| Planned Giving Marketing | | \$0 | \$50,000 | | \$50,000 | \$50,000 |
| Subtotal University Relations & Development | \$100,000 | \$100,000 | \$200,000 | \$0 | \$200,000 | \$300,000 |
| Institutional: | | | | | | |
| SSE ARP Coordinator | | \$0 | \$82,188 | | \$82,188 | \$82,188 |
| Staff Professional Development (across the University) | \$250,000 | \$250,000 | | | \$0 | \$250,000 |
| Enhancing Campus Climate and Culture (ECCC) Initiatives | \$500,000 | \$500,000 | | | \$0 | \$500,000 |
| Subtotal Institutional | \$750,000 | \$750,000 | \$82,188 | \$0 | \$82,188 | \$832,188 |
| Total Strategic Planning Initiatives | \$8,694,000 | \$8,694,000 | \$2,824,910 | \$0 | \$2,824,910 | \$11,518,910 |

2017/18 Integrated Budget Proposals -- Consolidated

| | (1) 2017/18 One-Time | (2) 2017/18 Encumbered One-Time | (3) Cumulative One-Time (Cols 1 + 2) | (4) 2017/18 Base | (5) 2017/18 Encumbered Base | (6) Cumulative Base (Cols 4 + 5) | (7) 2017/18 TOTAL (Cols 3 + 6) |
|--|----------------------------|--|---|------------------------|--------------------------------------|---|---|
| Critical Support Needs | | | | | | | |
| President's Office: | | | | | | | |
| Subtotal President's Office | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Academic Affairs: | | | | | | | |
| CES-Funded Faculty | | | | \$271,000 | | \$271,000 | \$271,000 |
| IVC Operations Budget | | | \$0 | \$20,000 | | \$20,000 | \$20,000 |
| Instructional Student Assistants | | | \$0 | \$500,000 | | \$500,000 | \$500,000 |
| University Graduate Fellowship (UGF) | | | \$0 | \$500,000 | | \$500,000 | \$500,000 |
| Supplemental Instruction | | | \$0 | \$245,000 | | \$245,000 | \$245,000 |
| General Education Program Reform | \$45,600 | | \$45,600 | | | \$45,600 | \$45,600 |
| New Registration Timeline Support | \$249,600 | | \$249,600 | | | \$249,600 | \$249,600 |
| 2016/17 Enrollment Growth (1400 FTES) | \$2,940,000 | | \$2,940,000 | | | \$2,940,000 | \$2,940,000 |
| University Graduate Fellowship (UGF) | \$500,000 | | \$500,000 | | | \$500,000 | \$500,000 |
| DUS Student Achievement Initiatives | \$32,500 | | \$32,500 | | | \$32,500 | \$32,500 |
| SDCC Funds for Remedial Instruction | \$150,000 | | \$150,000 | | | \$150,000 | \$150,000 |
| Library Subscriptions | \$400,000 | | \$400,000 | | | \$400,000 | \$400,000 |
| NCDD Memberships and IHE Subscription | \$116,000 | | \$116,000 | | | \$116,000 | \$116,000 |
| Equipment Maintenance | \$311,000 | | \$311,000 | | | \$311,000 | \$311,000 |
| Center for Teaching & Learning | \$59,000 | | \$59,000 | | | \$59,000 | \$59,000 |
| Subtotal Academic Affairs | \$4,803,700 | \$0 | \$4,803,700 | \$1,536,000 | \$0 | \$1,536,000 | \$6,339,700 |
| Student Affairs: | | | | | | | |
| ADA Mandatory Accommodations | \$208,000 | | \$208,000 | | | \$208,000 | \$208,000 |
| Subtotal Student Affairs | \$208,000 | \$0 | \$208,000 | \$0 | \$0 | \$0 | \$208,000 |
| Business & Financial Affairs: | | | | | | | |
| EH&S - Chemical Inventory Tracking Software | \$75,000 | | \$75,000 | | | \$75,000 | \$75,000 |
| Public Safety - CSO | \$100,000 | | \$100,000 | | | \$100,000 | \$100,000 |
| Public Safety - Threat Assessment | | | \$0 | \$133,160 | | \$133,160 | \$133,160 |
| Public Safety - Dispatch Equity | | | \$0 | \$51,000 | | \$51,000 | \$51,000 |
| Public Safety - SUPA Equity | | | \$0 | \$36,000 | | \$36,000 | \$36,000 |
| Public Safety - Dispatch | \$95,000 | | \$95,000 | | | \$95,000 | \$95,000 |
| Emergency Preparedness - Director & OE&E | | | \$0 | \$200,000 | | \$200,000 | \$200,000 |
| New Registration Timeline Support | \$120,000 | | \$120,000 | | | \$120,000 | \$120,000 |
| Facilities Services - Maintenance Contracts | | | \$0 | \$100,000 | | \$100,000 | \$100,000 |
| Facilities Services - Buyer/Analyst | | | \$0 | \$100,000 | | \$100,000 | \$100,000 |
| Subtotal Business & Financial Affairs | \$390,000 | \$0 | \$390,000 | \$620,160 | \$0 | \$620,160 | \$1,010,160 |
| University Relations & Development: | | | | | | | |
| Subtotal University Relations & Development | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Institutional: | | | | | | | |
| SDSU Research Foundation | \$1,000,000 | | \$1,000,000 | | | \$1,000,000 | \$1,000,000 |
| Worker's Compensation (Year 3 of 4) | \$700,000 | | \$700,000 | | | \$700,000 | \$700,000 |
| Painting | \$500,000 | | \$500,000 | | | \$500,000 | \$500,000 |
| Window Washing | \$75,000 | | \$75,000 | | | \$75,000 | \$75,000 |
| HVAC Replacement - North Life Sciences/Education | \$2,500,000 | | \$2,500,000 | | | \$2,500,000 | \$2,500,000 |
| Alley behind OHA | \$500,000 | | \$500,000 | | | \$500,000 | \$500,000 |
| Veteran House - Rent (for 4 years) | \$90,000 | | \$90,000 | | | \$90,000 | \$90,000 |
| Subtotal Institutional | \$5,365,000 | \$0 | \$5,365,000 | \$0 | \$0 | \$0 | \$5,365,000 |
| Total Critical Support Needs | \$10,766,700 | \$0 | \$10,766,700 | \$2,156,160 | \$0 | \$2,156,160 | \$12,922,860 |
| Total Strategic Planning Initiatives/Critical Support Needs | \$19,410,700 | \$0 | \$19,410,700 | \$4,981,070 | \$0 | \$4,981,070 | \$24,391,770 |

| B 2017-01 | | |
|---|--------------------|--------------------|
| 2016/17 Support Budget | | |
| State General Fund Allocation | 179,551,596 | |
| Basic (SUF) Tuition Fee (net of SUG tuition discounts) | 127,842,958 | |
| Other Fee Revenue | 57,381,222 | |
| Other Revenue and Cost Recovery | 22,226,632 | |
| 2016/17 Support Budget | 387,002,408 | |
| 2016/17 Unallocated Base Reserve | | 1,588,256 |
| 2017/18 Adjustments: | | |
| 2016/17 GF Base Adjustments | | |
| Mandatory Retirement Adjustment | | |
| Mandatory Retirement Adjustment - benefit pool | AttachB (1) | 2,711,000 |
| | AttachB (1) | (2,711,000) |
| | | 0 |
| 2017/18 GF Base Adjustments | | |
| New 2017/18 General Fund Allocations | AttachC (10) | 7,274,000 |
| | | 7,274,000 |
| 2017/18 Estimated Revenue Adjustments | | |
| SDSU tuition estimate [1] | SDSU | 13,873,000 |
| State University Grant - SUG pool | AttachC (7) | (2,414,000) |
| | | 11,459,000 |
| 2017/18 Mandatory Costs | | |
| CO Health (\$912K systemwide) - benefit pool | AttachC (1) | (65,000) |
| CO Dental (\$2.4M systemwide) - benefit pool | AttachC (2) | (171,000) |
| 2017/18 Compensation Pool (SDSU estimate current and new contracts) | SDSU estimate | (14,392,000) |
| | | (14,628,000) |
| 2017/18 Base Reserve | | 5,693,256 |
| PBAC 4/27/2017 PENDING Allocation | | (4,981,070) |
| 2017/18 Final Base Reserve | | 712,186 |
| 2017/18 Target Unallocated Base Reserve | | (4,000,000) |
| 2017/18 Base Funding Surplus/(Deficit) from Target Reserve | | (3,287,814) |
| 2017/18 Support Budget | | |
| State General Fund Allocation | | 189,536,596 |
| Basic (SUF) Tuition Fee (net of SUG tuition discounts) | estimate | 139,301,958 |
| Other Fee Revenue | estimate | 60,381,222 |
| Other Revenue and Cost Recovery | estimate | 22,226,632 |
| 2017/18 Support Budget | | 411,446,408 |

[1] Tuition estimated based on enrollment data provided by AA 3/27/2017

SDSU Multi-Year Budget Plan

Institutional Base Reserve

| | 2013/14 | 2014/15 | 2015/16 | 2016/17 (B 2016-02) | 2017/18 (B 2017-01) |
|---|---------------------|--------------------|--------------------|---------------------|---------------------|
| Beginning Balance | 11,525,283 | 4,236,929 | 2,675,762 | 5,200,077 | 1,588,256 |
| Tuition Rollback/Buyback | 9,844,000 | | | | |
| GF Base adjustments | 6,408,000 | 1,612,400 | 8,093,800 | 4,134,000 | 9,985,000 |
| GF Base Compensation (15/16) - Faculty (2% each year) | | | | 2,424,000 | |
| GF Base Compensation (16/17) - Faculty (2% each year) | | | | 2,537,000 | |
| Est. Compensation Costs - Faculty (7%) | | | | (9,100,000) | |
| GF Base Compensation (16/17) - Staff/Mgmt (2%) | | | | 2,593,000 | |
| Est. Compensation Costs - Staff/Mgmt (3%) | | | | (4,035,000) | |
| Est. Compensation Costs (17/18) | | | | | (14,392,000) |
| Student Success & Completion Initiatives (GF allocation) | | | 982,000 | 120,000 | |
| Enrollment Growth funding | 1,388,000 | 836,000 | 3,104,000 | 2,068,000 | |
| GF tuition fee discount adjustment based on campus relative student need | (4,100) | | (155,000) | (96,000) | |
| Basic Tuition Revenue (net of SUG tuition discounts)/Non-Resident Tuitor | 3,246,100 | 5,148,100 | 3,903,800 | 3,268,000 | 11,459,000 |
| Est. Mandatory Costs | (10,259,000) | (2,718,500) | (8,093,800) | (4,134,000) | (2,947,000) |
| Est. Multi-Year Commitments (a) | (225,200) | (225,200) | | | |
| Divisional Allocation | (6,261,160) | | | | (10,000) |
| University Non-Divisional Reduction | | | | | |
| PRES Critical Support Needs | (880,982) | (803,528) | (1,096,706) | (2,180,017) | (1,999,055) |
| AA Strategic Initiatives | (1,198,709) | (668,768) | (720,718) | (118,000) | (1,536,000) |
| SA Strategic Initiatives | (1,134,243) | (264,588) | (291,056) | (203,646) | (407,167) |
| BFA Strategic Initiatives | (488,000) | (20,000) | (140,000) | (75,000) | (136,500) |
| BFA Critical Support Needs | (1,500,000) | (433,013) | (602,500) | (599,158) | (620,160) |
| URD Strategic Initiatives | (143,000) | (97,240) | (200,000) | (100,000) | (200,000) |
| URD Critical Support Needs | (480,300) | (301,800) | | | |
| Instit Strategic Initiatives | (400,000) | | | (105,000) | (82,188) |
| Instit Critical Support Needs | (100,000) | | (107,400) | | |
| Encumbered for 2014/15 AA Faculty hires | (5,099,760) | | | | |
| Encumbered for 2015/16 AA Faculty hires | | (2,300,030) | | | |
| 4/16/15 PBAC Allocation | | (1,300,000) | | | |
| 11/19/15 PBAC Allocation | | | (652,105) | | |
| 11/19/15 PBAC Allocation Encumbered for 2017/18 (was 2016/17) Faculty hires | | | (1,500,000) | | |
| Unallocated Base Reserve | 4,236,929 | 2,675,762 | 5,200,077 | 1,588,256 | 712,186 |

Target Unallocated Base Reserve
Base Funding Surplus/(Deficit) from Target Reserve

| | | | | | |
|--|-------------|-------------|-------------|-------------|-------------|
| | (4,000,000) | (4,000,000) | (4,000,000) | (4,000,000) | (4,000,000) |
| | 1,200,077 | (2,411,744) | | | (3,287,814) |

PBAC allocations:

SDSU Multi-Year Budget Plan

Institutional One-time Reserve

| | 2013/14 | 2014/15 | 2015/16 | 2016/17 (B 2016-02) | 2017/18 |
|--|-------------------|-------------------|------------------|---------------------|--------------------|
| Beginning Balance | 8,797,124 | 10,844,769 | 9,065,498 | 9,986,199 | 12,600,398 |
| Unallocated Institutional Base Reserve | 4,236,929 | 2,675,762 | 5,200,077 | 1,588,256 | 712,186 |
| Encumbered for Future Year AA Faculty hires - available for 1-time use in Current Year | 5,099,760 | 2,300,030 | 1,500,000 | 1,500,000 | - |
| GF Base Compensation (15/16) withheld by CO - Faculty (2%) | | | | 2,424,000 | |
| 2016/17 Student Success & Completion/Graduation Initiatives | | | | 254,000 | |
| 2016/17 Student Success (\$35M CSU) | | | | 1,650,000 | |
| Est. Fee Revenues over Budget (Sum/Fall) ^(b) | 16,626,697 | 21,566,615 | 13,910,518 | 15,128,864 | 11,500,000 |
| Est. Fee Revenues over Budget (Spr/application) ^(c) | | | 12,668,170 | 12,418,995 | |
| PBAC Allocations: | | | | | |
| Divisional Allocation | | | | | |
| AA Strategic Initiatives | (3,991,810) | (850,000) | (3,391,000) | (10,349,600) | (6,544,000) |
| AA Critical Support Needs | (10,736,016) | (3,118,428) | (4,169,032) | (4,679,508) | (4,803,700) |
| SA Strategic Initiatives | (492,815) | (137,810) | (451,000) | (1,530,749) | (1,300,000) |
| SA Critical Support Needs | (60,100) | | | | (208,000) |
| BFA Strategic Initiatives | | (380,000) | (38,000) | (5,000) | |
| BFA Critical Support Needs | (2,000,000) | (500,000) | (218,732) | (103,000) | (390,000) |
| URD Strategic Initiatives | (901,000) | (595,000) | (450,000) | (300,000) | (100,000) |
| URD Critical Support Needs | (862,000) | | | | |
| Instit Strategic Initiatives | (260,000) | (1,250,000) | (1,250,000) | (1,250,000) | (750,000) |
| Instit Critical Support Needs | (1,212,000) | (1,777,000) | (1,900,000) | (2,430,000) | (5,365,000) |
| Encumbered for 2014/15 AA faculty start-up | (3,400,000) | | | | |
| Encumbered for 2015/16 AA faculty start-up | | (2,240,000) | | | |
| Encumbered for 2016/17 AA faculty start-up | | | (1,617,000) | | |
| 10/16/14 PBAC Allocation | | (3,043,440) | | | |
| 12/11/14 PBAC Allocation | | (5,075,000) | | | |
| 2/12/15 PBAC Allocation | | (855,000) | | | |
| 4/16/15 PBAC Allocation | | (8,500,000) | | | |
| 11/19/15 PBAC Allocation | | | (10,531,500) | | |
| 2/25/16 PBAC Allocation | | | (6,220,000) | | |
| 4/14/16 PBAC Allocation | | | (2,121,800) | | |
| 2/16/17 PBAC Allocation | | | | (5,402,059) | |
| 2/16/17 PBAC Allocation - HOLD for 17/18 Funding Gap | | | | (5,000,000) | |
| 4/13/17 PBAC Allocation | | | | (1,300,000) | |
| Unallocated One-Time Reserve | 10,844,769 | 9,065,498 | 9,986,199 | 12,600,398 | 5,351,884 |
| Target Unallocated One-Time Reserve | | | | | |
| | | | (8,000,000) | (8,000,000) | (8,000,000) |
| Est. One-Time Funding Surplus/(Deficit) from Target Reserve | | | 1,986,199 | 4,600,398 | (2,648,116) |

[a] Faculty Promotion Funding Agreed upon formula = funding allocated for 70% of cost; estimated cost, data not available until late May

[b] 2016/17 estimated fee revenues over budget represents Summer/Fall semesters

[c] 2016/17 estimated fee revenues over budget represents Spring semester and application fees

PRESIDENT'S BUDGET ADVISORY COMMITTEE

April 13, 2017

MINUTES

| Voting Members Present: | Area Budget Reps Present: | Staff Present: | Guests Present: |
|--------------------------------|----------------------------------|-----------------------|------------------------|
| Eric Rivera | Radmila Prislín | Crystal Little | |
| Jamie Miller | Agnes Wong Nickerson | Nance Lakdawala | |
| Marcie Bober Michele | Tony Chung | Gina Jacobs | |
| Chukuka S. Enwemeka | Travis Clancy | | |
| Donna Conaty | | | |
| Megan Collins | | | |

Voting Members Absent: Area Budget Reps Absent

Mary Ruth Carleton

Tom McCarron

- I. **Call to order** - AVP Wong Nickerson called the meeting to order at 2:00 p.m. She inquired if there were any amendments to the agenda but there were none.

II. Information Items

- **2017/18 Budget Update** – AVP Wong Nickerson stated the Board of Trustees approved a \$270 fee increase and \$4M will be available for PBAC funding items next year. We will need to report back to the CSU how the increased funds are being used to support graduation initiatives. If the state fully funds the CSU request of \$168M, the fee increase will be rescinded.
- **2016/17 Revised PBAC Calendar (Attachment 1)** – AVP Wong said a revised schedule is in this package. We rescheduled the presentations one week earlier due to scheduling conflicts. Presentations are today and April 27th, and the vote will be in May or June latest.

III. Reports

- **2016/17 Revenues (Attachment 2)** – The revenues have increased by about \$670,000 as we have more finalized figures now.
- **2016/17 Base Reserves (Attachment 3)** – The figures are still the same. We are about \$2.4M short of our target.
- **2016/17 One-Time Reserves (Attachment 4)** – A couple of requests are being presented today. The one-time reserves will be about \$8M if the requests are approved.
- **Multi-Year Budget (Attachment 5)** – No significant changes.

IV. Watch List

- **Master Plan Costs** – No changes.

- **Unfunded Compensation Items**– No changes. The CSU is still negotiating with bargaining units whose contracts expire 6/30.
- **Campus Projects** – We have steam and electrical projects in process. We are also looking at HVAC systems. Some air handlers are over 50 years old and need to be replaced. The average lifespan is 30 years.

V. Funding Requests/Vote

- **2016/17 1x Request – AA (Attachment 6)** – AVP Prislin requested \$800,000 in one-time funds to upgrade the advising system, and perform multifaceted activities to support undergraduate advising. The CO is buying a system wide product so we will know what else we need in a few months.
- **2016/17 1x Request – INSTIT (Attachment 7)** – AVP Wong Nickerson requested \$500,000 for painting to focus on interiors of several buildings BRAT and AR&P supported this expenditure.

Associate Dean Conaty moved to support both funding items, Chief of Staff Collins seconded, and the motion passed unanimously.

VI. 2017/18 Funding Requests

- **2017/18 SA Budget Proposals (Attachment 8)** – AVP Chung presented several funding requests. *The EOP Summer Bridge* – This is for a 5-week program for 60 students that will be living on campus. This doesn't include meals, and costs are continuing to increase. We are working on aligning this program with housing so we don't have to keep asking for more funding. AR&P agreed this should be classified as core instead of conference.

International Student Transition and Retention – We want to create more programs for international students so they are more academically successful. The mentoring program is going well. We have been supporting this program with salary savings but that is not sustainable so we would like to request base funding.

Peer Commuter Academic Mentoring Program – We conducted a pilot program “sophomore surge” which has been very successful so we want to institutionalize it. We have been studying the freshman cohort of 2010 that didn't graduate – 26% - and have concluded that sophomores also need more support.

Black Resource Center Renovation – student initiative. The Afrikan Student Excellence Council is hoping to renovate the Black Resource Center to create a more positive community, and to recruit more African Americans to SDSU. This is our best estimate of costs. We also need to go thru the A.S. process for programming support.

Office of Financial Aid and Scholarships Renovation – Last year we completed the lobby expansion. This year we are hoping to renovate the internal spaces to

be more welcoming and provide more confidential rooms. This space hasn't been updated for more than 20 years.

ADA Mandatory Accommodations – Costs for accommodations have increased and we have a shortfall in the base budget. The costs vary, depending on the syllabi and professors' requirements. AR&P has more questions for a later meeting.

- **2017/18 URAD Budget Proposals (Attachment 9)** – Interim CFO Clancy presented two funding requests. *Branding and Marketing* – We are hoping to continue our campaign that has been supported the last few years. Initiatives are raising funds, out-of-state recruitment, and raising rankings.

Institutional Television Spot – We are replacing a spot that is over 3 years old and wish to air it by doing traditional media/cable buys in key target markets.

Planned Giving Marketing – We are asking for base funding as we are having a lot of success with obtaining planned giving. We averaged \$30M the past two years which is a good return on investment.

VII. New Business – None. Meeting adjourned at 2:50 p.m.

VIII. Reminder – Next Meeting Date – April 27, 2017 at 2:00 p.m. in MH-3318.

PRESIDENT'S BUDGET ADVISORY COMMITTEE

April 27, 2017

MINUTES

| | | | |
|--------------------------------|----------------------------------|-----------------------|------------------------|
| Voting Members Present: | Area Budget Reps Present: | Staff Present: | Guests Present: |
| Tom McCarron | Radmila Prislin | Crystal Little | Jessica Rentto |
| Jamie Miller | Agnes Wong Nickerson | Nance Lakdawala | |
| Marcie Bober Michele | Tony Chung | | |
| Mary Ruth Carleton | Travis Clancy | | |
| Donna Conaty | Leslie Levinson | | |
| Megan Collins | | | |
| Eric Rivera (via phone) | | | |

| | |
|-------------------------------|--------------------------------|
| Voting Members Absent: | Area Budget Reps Absent |
| Cezar Ornatowski | |
| Chukuka S. Enwemeka | |

- I. Call to order** - VP McCarron called the meeting to order at 2:00 p.m. He inquired if there were any amendments to the agenda but there were none.
- II. Information Items** – VP McCarron said we will have the governor's revise in about two weeks. We will come up about \$3M short due to redistribution of revenue to other campuses and will be advocating for a review of this process for future years. We expect to receive final approval on the 2017-18 Budget by mid-June.
- III. Reports**
- **2016/17 Revenues (Attachment 1)** – VP McCarron said there is a small adjustment from the last meeting. We are over budget by \$27.5M.
 - **2016/17 Base Reserves (Attachment 2)** – VP McCarron said the figures are the same as our last meeting.
 - **2016/17 One-Time Reserves (Attachment 3)** – VP McCarron said there is a balance of \$12.6M, a little above our target.
- IV. Watch List**
- **Master Plan Costs** – No update.
 - **Unfunded Compensation Items**– VP McCarron said we have not finalized several of our bargaining unit contracts. We have estimates in our 2017-18 Budget.
 - **Campus Projects** – No update.

V. Funding Requests

- **2017/18 AA Budget Proposals (Attachment 4)** – AVP Prislin explained the AA funding items. This is the fifth year of our strategic planning. Regarding the Center for Teaching and Learning funding request, VP Carleton requested to see expenses on the Jim Sinegal visit because he waived his fees. AVP Prislin will provide the information to VP Carleton.
- **2017/18 BFA Budget Proposals (Attachment 5)** – AVP Rentto explained the University Police, and Environmental Health and Safety requests. AVP Wong Nickerson presented the remaining BFA requests.
- **2017/18 INSTIT Budget Proposals (Attachment 6)** – AVP Wong Nickerson presented these requests.
- **2017/18 Consolidated Funding Requests (Attachment 7)** – AVP Wong Nickerson presented this attachment.

VI. 2017/18 Budget

- **2017/18 Estimated 2017-01 Budget (Attachment 8)** – AVP Wong Nickerson said the base reserve would go from \$1.58M to \$712,000. This budget includes all funding requests. We do have some flexibility. Retirement rates have gone up. Mandatory costs are built in but figures do not reflect allocation from CSU. Also \$3M of funding requests need to be used for graduation initiatives.
- **Multi-Year Budget (Attachment 9)** - Our fee revenues will be about \$11.5M. AR&P is concerned about the low level of reserves. VP McCarron said we are likely to get more money from the CSU, and figures listed are conservative. VP Carleton moved to recommend approval of the budget, Associate Dean Conaty seconded, and the motion passed unanimously.

VII. New Business – None. Meeting adjourned at 3:20 p.m. This is our last meeting for the semester. VP McCarron thanked everyone for their service and a special thanks to Jamie.

VIII. Reminder – Next Meeting Date – September 2017