

## **PRESIDENT'S BUDGET ADVISORY COMMITTEE**

**April 28, 2016**

### **MINUTES**

<b>Voting Members Present:</b>	<b>Area Budget Reps Present:</b>	<b>Staff Present:</b>	<b>Guests Present:</b>
Tom McCarron	Radmila Prislin	Nance Lakdawala	
Cezar Ornatowski	Agnes Wong Nickerson		
Blaire Ward	Tony Chung		
Chukuka S. Enwemeka	Leslie Levinson		
Donna Conaty			
Jessica Rentto for Megan Collins			
Eric Rivera			
Mary Ruth Carleton			

**Voting Members Absent:**      **Area Budget Reps Absent**  
Douglas Deutschman

- 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. VP McCarron also thanked Student Affairs and University Relations and Development for presenting their budget requests today.
- II. Information Items** – VP McCarron said we will probably receive the governor's May Revise around May 13<sup>th</sup>. We are not anticipating augmentation of our current estimated budget at this time as state revenues are down \$1B. VP Carleton and AVP Rentto will be traveling with President Hirshman to Sacramento in May to advocate for more funding.
- III. Reports**
- **2015/16 Revenues (Attachment 1)** – VP McCarron said the revenue estimates are about the same as those presented at our last meeting.
  - **2015/16 Base Reserves (Attachment 2)** – No change.
  - **2015/16 One-Time Reserves (Attachment 3)** – The one-time reserves have been adjusted to reflect the availability of the full \$5,200,077 base budget reserve.
  - **Multi-Year Budget (Attachment 4)** – This attachment reflects our funding history for the past three years.
- IV. Watch List**
- **Master Plan Costs** – We have settled the legal fees and discussing next steps.
  - **Unfunded Compensation** – No update.
  - **Campus Projects: Alvarado Creek** – No update.

**V. Funding Requests**

- **2016/17 Student Affairs Budget Proposals (Attachment 5)** – AVP Chung presented Student Affairs' budget proposals.
- **2016/17 University Relations and Development Budget Proposals (Attachment 6)** – CFO Levinson presented UR&D's budget proposals.

**VI. Voting Items** – VP McCarron said we will not vote today as budget proposals for the other divisions have not been presented yet.

**VII. New Business** – None.

**VIII. Reminder** – The meeting was adjourned at 2:40 p.m. Our next meeting is scheduled for Thursday, May 12 at 2:00 p.m. in MH-3318. Academic Affairs, Business and Financial Affairs, and the President's Office will present their budget requests for next year.

**President's Budget Advisory Committee**  
**Meeting Agenda**

April 28, 2016  
2:00p.m. @ MH-3318

**I. Call to order**

- Call for amendments to agenda

**II. Information Item**

**III. Reports**

- 2015/16 Revenues (Attachment 1)
- 2015/16 Base Reserves (Attachment 2)
- 2015/16 One-Time Reserves (Attachment 3)
- Multi-Year Budget (Attachment 4)

**IV. Watch List**

- Master Plan Costs
- Unfunded Compensation Items
- Campus Projects

**V. Funding Requests**

- 2016/17 SA Budget Proposals (Attachment 5)
- 2016/17 URD Budget Proposals (Attachment 6)

**VI. Voting Items**

- None

**VII. New Business**

**VIII. Reminder**

- Next Meeting Date – May 12, 2016 at 2:00 p.m. in MH 3318

**SAN DIEGO STATE UNIVERSITY**  
2015/16 Revenue Estimates  
As of April 25, 2016

	2014/15 Budget	2014/15 Actual	Over/(Under) Budget	% Over/(Under) Budget	2015/16 Budget	Year to Date as of 4/25/2016	Term End Estimate	Over/(Under) Budget	% Over/(Under) Budget
<b><u>Basic Tuition Fee - Resident</u></b>									
Summer	9,773,574	9,380,271	(393,303)	-4.02%	8,683,000	8,889,742	8,889,742 <sup>[1]</sup>	206,742	2.38%
Fall	72,765,955	74,705,211	1,939,256	2.67%	73,765,000	75,217,812	75,217,812 <sup>[1]</sup>	1,452,812	1.97%
Spring	<u>66,525,656</u>	<u>68,460,685</u>	<u>1,935,029</u>	<u>2.91%</u>	<u>67,526,000</u>	<u>67,679,320</u>	<u>68,029,080</u> <sup>[2]</sup>	<u>503,080</u>	<u>0.75%</u>
<b>Sub-Total Basic Tuition - Resident</b>	<b>149,065,185</b>	<b>152,546,167</b>	<b>3,480,982</b>	<b>2.34%</b>	<b>149,974,000</b>	<b>151,786,875</b>	<b>152,136,634</b>	<b>2,162,634</b>	<b>5.10%</b>
Tuition Fee Discounts	<u>(40,506,800)</u>	<u>(40,506,800)</u>	<u>0</u>	<u>0.00%</u>	<u>(40,951,800)</u>	<u>(40,951,800)</u>	<u>(40,951,800)</u>	<u>0</u>	<u>0.00%</u>
<b>Net Basic Tuition - Resident</b>	<b>108,558,385</b>	<b>112,039,367</b>	<b>3,480,982</b>	<b>3.21%</b>	<b>109,022,200</b>	<b>110,835,075</b>	<b>111,184,834</b>	<b>2,162,634</b>	<b>1.98%</b>
<b><u>Basic Tuition Fee - Non-Resident</u></b>									
Summer	1,004,427	1,186,558	182,131	18.13%	733,000	1,472,732	1,472,732 <sup>[1]</sup>	739,732	100.92%
Fall	8,487,045	9,533,355	1,046,311	12.33%	7,169,000	10,974,548	10,974,548 <sup>[1]</sup>	3,805,548	53.08%
Spring	<u>7,736,344</u>	<u>8,684,957</u>	<u>948,614</u>	<u>12.26%</u>	<u>6,542,000</u>	<u>9,634,970</u>	<u>9,684,762</u> <sup>[2]</sup>	<u>3,142,762</u>	<u>48.04%</u>
<b>Sub-Total Basic Tuition - Non-Resident</b>	<b>17,227,815</b>	<b>19,404,870</b>	<b>2,177,055</b>	<b>12.64%</b>	<b>14,444,000</b>	<b>22,082,249</b>	<b>22,132,042</b>	<b>7,688,042</b>	<b>53.23%</b>
<b><u>Out-of-State Tuition</u></b>									
Summer	384,600	654,808	270,208	70.26%	485,000	731,087	731,087 <sup>[1]</sup>	246,087	50.74%
Fall	5,848,000	8,173,887	2,325,887	39.77%	6,634,000	10,509,050	10,509,050 <sup>[1]</sup>	3,875,050	58.41%
Spring	<u>5,218,000</u>	<u>9,153,636</u>	<u>3,935,636</u>	<u>75.42%</u>	<u>5,880,000</u>	<u>9,098,282</u>	<u>9,137,190</u> <sup>[2]</sup>	<u>3,257,190</u>	<u>55.39%</u>
<b>Sub-Total Out-of-State Tuition</b>	<b>11,450,600</b>	<b>17,982,331</b>	<b>6,531,731</b>	<b>57.04%</b>	<b>12,999,000</b>	<b>20,338,419</b>	<b>20,377,328</b>	<b>7,378,328</b>	<b>56.76%</b>
<b><u>International Tuition</u></b>									
Summer	429,600	829,560	399,960	93.10%	827,000	1,082,148	1,082,148 <sup>[1]</sup>	255,148	30.85%
Fall	3,651,000	7,269,840	3,618,840	99.12%	5,879,000	9,120,703	9,120,703 <sup>[1]</sup>	3,241,703	55.14%
Spring	<u>3,478,000</u>	<u>7,671,318</u>	<u>4,193,318</u>	<u>120.57%</u>	<u>5,528,000</u>	<u>8,328,895</u>	<u>8,304,733</u> <sup>[2]</sup>	<u>2,776,733</u>	<u>50.23%</u>
<b>Sub-Total International Tuition</b>	<b>7,558,600</b>	<b>15,770,718</b>	<b>8,212,118</b>	<b>108.65%</b>	<b>12,234,000</b>	<b>18,531,746</b>	<b>18,507,584</b>	<b>6,273,584</b>	<b>51.28%</b>
<b>TOTAL TUITION</b>	<b>144,795,400</b>	<b>165,197,286</b>	<b>20,401,886</b>	<b>14.09%</b>	<b>148,699,200</b>	<b>171,787,490</b>	<b>172,201,788</b>	<b>23,502,588</b>	<b>15.81%</b>
<b>Application Fee</b>	<b>2,294,000</b>	<b>3,458,730</b>	<b>1,164,730</b>	<b>50.77%</b>	<b>2,294,000</b>	<b>3,430,050</b>	<b>3,430,050</b> <sup>[1]</sup>	<b>1,136,050</b>	<b>49.52%</b>
<b>TOTAL APPLICATION FEE</b>	<b>2,294,000</b>	<b>3,458,730</b>	<b>1,164,730</b>	<b>50.77%</b>	<b>2,294,000</b>	<b>3,430,050</b>	<b>3,430,050</b>	<b>1,136,050</b>	<b>49.52%</b>
<b>TOTAL</b>	<b>147,089,400</b>	<b>168,656,016</b>	<b>21,566,616</b>	<b>14.66%</b>	<b>150,993,200</b>	<b>175,217,540</b>	<b>175,631,838</b>	<b>24,638,638</b>	<b>16.32%</b>

[1] Term estimates are based on actual revenues.

[2] Term estimates are based on SAS Enrollment Report as of 4/6/2016 discounted based on prior year waiver/collections experience.

<b>Base Budget Reserve<sup>[a]</sup></b>			
<b>2015/16 Beginning Base Budget Reserve Balance</b>			<b>2,675,762</b>
	Net Campus and BL Adjustments		7,834,800
<b>2015/16 Base Budget Reserve</b>			<b>10,510,562</b>
	2015/16 Target Unallocated Base Budget Reserve		(4,000,000)
<b>2015/16 Base Funding Available for Investment in the University</b>			<b>6,510,562</b>
<b>2015/16 Approved Base Funding Requests</b>			
<b>Academic Affairs</b>			
	Tenure and Promotion	5/28/15 PBAC	(271,300)
	Tenure Track Promotion Equity	5/28/15 PBAC	(180,000)
	Tenure Track Faculty Market Equity Requests	5/28/15 PBAC	(70,000)
	Honors College	5/28/15 PBAC	(19,456)
	Math Center	5/28/15 PBAC	(220,950)
	Arts Alive	5/28/15 PBAC	(80,000)
	Zahn Center	5/28/15 PBAC	(200,000)
	IRB Software	5/28/15 PBAC	(55,000)
	Resident Enrollment (198 FTES)	5/28/15 PBAC	(490,838)
	ITS Graphic Designer	5/28/15 PBAC	(35,720)
	Engineering Lab Technician	5/28/15 PBAC	(126,160)
	IVC - 5 Year Plan Operations	5/28/15 PBAC	(20,000)
	City Heights	5/28/15 PBAC	(48,000)
	AA - Faculty Equity (includes benefits)	11/19/15 PBAC	(262,000)
	AA - Lecturer SRI (includes benefits)	11/19/15 PBAC	(65,554)
	AA - Cost Shift GRA (includes benefits)	11/19/15 PBAC	(109,551)
	AA - Stepsay	11/19/15 PBAC	(25,000)
	AA - Enrollment Growth (548 FTES) ENCUMBER for 2016/17	11/19/15 PBAC	(1,500,000)
<b>Student Affairs</b>			
	Aztec Mentor Program (AMP)	5/28/15 PBAC	(139,996)
	Emergency Crisis Response Team	5/28/15 PBAC	(12,000)
	Women's Resrouce Center Programming	5/28/15 PBAC	(50,000)
	Commuter Learning Communities	5/28/15 PBAC	(89,060)
<b>Business &amp; Financial Affairs</b>			
	Celebrating Aztec Faculty and Staff Committee	5/28/15 PBAC	(40,000)
	Athletics Leadership Program	5/28/15 PBAC	(100,000)
	Title IX Program and Infrastructure	5/28/15 PBAC	(12,500)
	Title IX Administration Support (Student Assistants)	5/28/15 PBAC	(5,000)
	Public Safety Dispatchers	5/28/15 PBAC	(95,000)
	Custodians and Utilities	5/28/15 PBAC	(270,000)
	Chill Plant Supervisor	5/28/15 PBAC	(120,000)
	Control Specialist	5/28/15 PBAC	(100,000)
	BFA - GIS database (includes benefits)	11/19/15 PBAC	(90,000)
<b>University Relations &amp; Development</b>			
	National Branding & Marketing - year 3	5/28/15 PBAC	(200,000)
<b>Institutional</b>			
	Automated External Defibrillator Program	5/28/15 PBAC	(7,400)
	Budget & Reporting Solution	5/28/15 PBAC	(100,000)
	Institutional - International Travel Insurance	11/19/15 PBAC	(50,000)
	Institutional - Background Check	11/19/15 PBAC	(50,000)
<b>Subtotal 2015/16 Approved Base Budget Funding Requests</b>			<b>(5,310,485)</b>
<b>2015/16 PENDING Base Funding Requests</b>			
<b>SubTotal 2015/16 PENDING Base Funding Requests</b>			<b>0</b>
<b>2015/16 Estimated Base Budget Reserve Balance</b>			<b>5,200,077</b>
	2016/17 Target Unallocated Base Budget Reserve		(4,000,000)
<b>2015/16 Estimated Base Funding Available for Investment in the University</b>			<b>1,200,077</b>

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

**One-Time Reserve <sup>[a]</sup>**

2015/16 Beginning One-Time Reserve Balance	9,065,498
2015/16 Target Unallocated One-Time Budget Reserve	(8,000,000)
2015/16 One-Time Funding Available for Investment in the University	1,065,498

**2015/16 Approved One-Time Funding Requests**

**Academic Affairs**

Honors College	5/28/15 PBAC	(41,000)
Writing Center	5/28/15 PBAC	(50,000)
Math Center	5/28/15 PBAC	(125,000)
Arts Alive	5/28/15 PBAC	(51,500)
Zahn Center	5/28/15 PBAC	(250,000)
Multidisciplinary Research	5/28/15 PBAC	(154,000)
Expand Student Research Symposium	5/28/15 PBAC	(150,000)
Learning Analytics	5/28/15 PBAC	(217,000)
International Programs	5/28/15 PBAC	(26,000)
Undergraduate Research	5/28/15 PBAC	(65,000)
Conrad Preby's Endowed Chair (3-year support)	5/28/15 PBAC	(200,000)
Opera Initiative	5/28/15 PBAC	(25,000)
Smart Upgrades	5/28/15 PBAC	(480,000)
Laboratory Renovations	5/28/15 PBAC	(1,020,000)
Provost Milestone Awards	5/28/15 PBAC	(100,000)
Visiting Scholars	5/28/15 PBAC	(75,000)
Competitive Graduate Stipends	5/28/15 PBAC	(110,000)
Research Development Program	5/28/15 PBAC	(251,500)
SDCC Funding	5/28/15 PBAC	(150,000)
Non Resident Enrollment (1017 FTES)	5/28/15 PBAC	(2,338,565)
Library - Subscriptions	5/28/15 PBAC	(400,000)
College ADA	5/28/15 PBAC	(106,514)
Accreditation Fees	5/28/15 PBAC	(190,000)
Equip Maintenance Contracts	5/28/15 PBAC	(375,000)
Software Licenses	5/28/15 PBAC	(169,000)
Student Assistant	5/28/15 PBAC	(439,953)
AA - Enrollment Growth (lecturers)	11/19/15 PBAC	(1,050,000)
AA - Grad Division	11/19/15 PBAC	(267,500)
AA - SSF ARP	11/19/15 PBAC	(118,000)
AA - Stepsay \$50K	11/19/15 PBAC	(50,000)
AA - GRA Research Support	2/25/16 PBAC	(110,000)
AA - GRA Design Thinking Lab	2/25/16 PBAC	(50,000)

**Academic Affairs - Encumbered in 2015/16, One-time in 2016/17**

Areas of Excellence Start-up Funds	5/28/15 PBAC	(1,200,000)
Tenure Track Start-up Packages	5/28/15 PBAC	(417,000)

**Student Affairs**

Peer Commuter Academic Mentoring Program	5/28/15 PBAC	(251,000)
Student Leadership Diversity Training	5/28/15 PBAC	(200,000)

**Business & Financial Affairs**

Active Transportation and Smoking Policy Awareness & Enforcement	5/28/15 PBAC	(20,000)
Bike Lock Program	5/28/15 PBAC	(18,000)
Title IX Program and Infrastructure	5/28/15 PBAC	(5,000)
Human Resources Background Check Overhead	5/28/15 PBAC	(25,000)
Public Safety Dispatchers	5/28/15 PBAC	(95,000)
Body Worn Cameras	5/28/15 PBAC	(45,732)
Geofeedia Contract	5/28/15 PBAC	(18,000)
Mobile Safety App Services	5/28/15 PBAC	(30,000)
BFA - Public Safety	4/14/16 PBAC	(172,800)

**University Relations & Development**

National Branding & Marketing - year 3	5/28/15 PBAC	(200,000)
Direct Mail	5/28/15 PBAC	(100,000)
Lost Alumni Project - year 2	5/28/15 PBAC	(100,000)
Planned Giving Marketing Budget	5/28/15 PBAC	(50,000)

**Institutional**

Staff Professional Development (across the University)	5/28/15 PBAC	(250,000)
Enhancing Campus Climate and Culture (ECCC) initiatives	5/28/15 PBAC	(1,000,000)
SDSU Research Foundation	5/28/15 PBAC	(1,000,000)
Painting	5/28/15 PBAC	(500,000)
Window Washing	5/28/15 PBAC	(100,000)
Gum Removal	5/28/15 PBAC	(100,000)
Budget & Reporting Solution	5/28/15 PBAC	(200,000)
Institutional - EIS Building	11/19/15 PBAC	(5,000,000)
Institutional - Insurance - Workers Compensation	11/19/15 PBAC	(700,000)
Institutional - Environ Impact Report (modify 2007 with enrollment change)	11/19/15 PBAC	(500,000)
Institutional- Electrical Infrastructure Assessment	11/19/15 PBAC	(500,000)
Institutional - Utility Lines Repair	11/19/15 PBAC	(1,650,000)
Institutional - Sports Deck Resurface	11/19/15 PBAC	(696,000)
AA/Institutional - EIS Building	2/25/16 PBAC	(5,000,000)
Institutional - Master Plan Litigation	2/25/16 PBAC	(250,000)
Institutional- Chill Plant Roof Repair	2/25/16 PBAC	(310,000)
Institutional - Painting	2/25/16 PBAC	(500,000)
Institutional - Alvarado Creek Emerg Repairs	4/14/16 PBAC	(1,500,000)
Institutional - PSFA Refresh Feasibility Study	4/14/16 PBAC	(449,000)
<b>SubTotal 2015/16 Approved One-Time Funding Requests</b>		<b>(32,358,064)</b>

**2015/16 PENDING One-Time Funding Requests**

**SubTotal 2015/16 PENDING One-Time Funding Requests**

**0**

**2015/16 Funding Sources**

AA - Encumbered in 2015/16, Base in 2016/17 - available for one-time use in 2015/16	1,500,000
Estimated Tuition and Fee Revenues over Budget (Sum/Fall)	13,822,823
Estimated Tuition and Fee Revenues over Budget (Spr, Application Fees)	10,815,815
Estimated One-Time Carry-forward of Base Budget Reserve	5,200,077
<b>2015/16 Estimated One-Time Reserve Balance</b>	<b>8,046,149</b>
<b>2015/16 Estimated One-Time Funding Available for Investment in the University</b>	<b>46,149</b>

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

## SDSU Multi-Year Budget Plan

### Institutional Base Reserve

	2012/13	2013/14	2014/15	2015/16
<b>Beginning Balance</b>	<b>209,533</b>	<b>11,525,283</b>	<b>4,236,929</b>	<b>2,675,762</b>
Tuition Rollback/Buyback	(9,381,000)	9,844,000		
GF Base adjustments	3,991,300	6,408,000	1,612,400	8,093,800
Student Success & Completion Initiatives (GF allocation)				982,000
Enrollment Growth funding		1,388,000	836,000	3,104,000
GF tuition fee discount adjustment based on campus relative student need		(4,100)		(155,000)
Basic Tuition Revenue (net of SUG tuition discounts)/Non-Resident Tuition		3,246,100	5,148,100	3,903,800
<i>PBAC allocations:</i>				
Est. Mandatory Costs	(1,605,000)	(10,259,000)	(2,718,500)	(8,093,800)
Est. Multi-Year Commitments [a]	(225,200)	(225,200)	(225,200)	-
Divisional Allocation	12,274,490			
University Non-Divisional Reduction	6,261,160	(6,261,160)		
AA Strategic Initiatives		(880,982)	(803,528)	(1,096,706)
AA Critical Support Needs		(1,198,709)	(668,768)	(720,718)
SA Strategic Initiatives		(1,134,243)	(264,588)	(291,056)
SA Critical Support Needs			(25,000)	-
BFA Strategic Initiatives		(488,000)	(20,000)	(140,000)
BFA Critical Support Needs		(1,500,000)	(433,013)	(602,500)
URD Strategic Initiatives		(143,000)	(97,240)	(200,000)
URD Critical Support Needs		(480,300)	(301,800)	-
Instit Strategic Initiatives		(400,000)		
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 2016/17 Faculty hires				(1,500,000)
<b>Unallocated Base Reserve</b>	<b>11,525,283</b>	<b>4,236,929</b>	<b>2,675,762</b>	<b>5,200,077</b>
2015/16 Target Unallocated Base Reserve				(4,000,000)
<b>2015/16 Base Funding Available for Investment in the University</b>				<b>1,200,077</b>

### Institutional One-time Reserve

	2012/13	2013/14	2014/15	2015/16
<b>Beginning Balance</b>	<b>7,361,340</b>	<b>8,797,124</b>	<b>10,844,769</b>	<b>9,065,498</b>
Unallocated Institutional Base Reserve	11,525,283	4,236,929	2,675,762	5,200,077
Encumbered for Future Year AA Faculty hires - available for 1-time use in Current Year		5,099,760	2,300,030	1,500,000
Est. Fee Revenues over Budget (Sum/Fall) <sup>[b]</sup>	10,266,172	16,626,697	21,566,615	13,822,823
Est. Fee Revenues over Budget (Spr/application) <sup>[c]</sup>				10,815,815
<i>PBAC Allocations:</i>				
Divisional Allocation	(3,000,000)			
AA Strategic Initiatives	(1,000,000)	(3,991,810)	(850,000)	(3,391,000)
AA Critical Support Needs	(4,931,341)	(10,736,016)	(3,118,428)	(4,169,032)
SA Strategic Initiatives	-	(492,815)	(137,810)	(451,000)
SA Critical Support Needs	(249,391)	(60,100)		-
BFA Strategic Initiatives	-	-	(380,000)	(38,000)
BFA Critical Support Needs	(4,413,779)	(2,000,000)	(500,000)	(218,732)
URD Strategic Initiatives	-	(901,000)	(595,000)	(450,000)
URD Critical Support Needs	(500,000)	(862,000)		-
Instit Strategic Initiatives		(260,000)	(1,250,000)	(1,250,000)
Instit Critical Support Needs	(6,261,160)	(1,212,000)	(1,777,000)	(1,900,000)
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)
<b>Unallocated One-Time Reserve</b>	<b>8,797,124</b>	<b>10,844,769</b>	<b>9,065,498</b>	<b>8,046,149</b>
2015/16 Target Unallocated One-Time Reserve				(8,000,000)
<b>2015/16 Est. One-Time Funding Available for Investment in the University</b>				<b>46,149</b>

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

[b] 2015/16 estimated fee revenues over budget represents Summer/Fall semesters.

[c] 2015/16 estimated fee revenues over budget represents Spring semester and application fees



## Student Affairs Budget Allocation Requests

FY 2016-17

### Strategic Initiatives -- Base Funding Request

	Amount	Notes
Assistant Director of International Student Programs	\$ 64,547.00	Institutionalize current personnel
Aztec Mentor Program (AMP) Software (Annual)	\$ 54,099.00	Annual recurring fee
EOP Learning Support Center	\$ 20,000.00	Institutionalize funding gap
One SDSU Community Program	\$ 65,000.00	Institutionalize program budget
<b>Total Base Funding Requests</b>	<b>\$ 203,646.00</b>	

### Strategic Initiatives -- One-Time Funding Request

	Amount	
Aztecs Hiring Aztecs (AHA!) Campaign	\$ 108,100.00	Implement advertising campaign
Aztec Mentor Program (AMP) Software (Start-Up)	\$ 13,999.00	Start-Up cost (above annual recurring fee)
EOP Renovation	\$ 750,000.00	Space remodel for Educational Opportunity Programs
OFAS Renovation	\$ 625,000.00	Space remodel for Office of Financial Aid & Scholarships
Pride Center and Women's Resource Center Infrastructure	\$ 33,650.00	Construction to install network/security infrastructure
<b>Total One-Time Funding Requests</b>	<b>\$ 1,530,749.00</b>	

## Assistant Director of International Student Programs -- \$64,547

### Background

The International Student Center (ISC) provides services that meet the diverse needs of the university's international student community, and offers programs which foster global perspectives, intercultural awareness and international goodwill.

The position of Assistant Director of International Student Programs is in direct support of the retention and long-term success of our international students. The position will be responsible for innovative programs of transition, engagement, integration, remediation, and retention of international students. An analysis on International Full-Time First-Time Freshman (FT-FTF) students showed that these students face unique challenges when studying at the university. This position will ensure that these students are supported and persist to graduation.

### Data

An analysis on the Fall 2014 cohort of international FT-FTF students was completed on March 28, 2106. The analysis found the following:

- International FT-FTF students have a higher probation rate after their first year (**12.1%**) when compared to In-State Resident students (4.6%) and the FT-FTF cohort in general (5.0%).
- International FT-FTF students have a higher disqualification rate after their first year (**6.0%**) when compared to In-State Resident students (3.0%) and the FT-FTF cohort in general (3.2%).
- International FT-FTF students earn fewer units on average after their first year (**27.9**) when compared to In-State Resident students (40.0) and the FT-FTF cohort in general (40.0).
- International FT-FTF students have a lower average GPA after their first year (**2.77**) when compared to In-State Resident students (2.97) and the FT-FTF cohort in general (2.96).
- International FT-FTF students have a lower second year return rate (**82.3%**) when compared to In-State Resident students (91.7%) and the FT-FTF cohort in general (89.8%).

### Goals

This goals of this position are:

- Use data to develop and refine targeted programs and initiatives, such as an academic recovery program to provide tutoring to students in probation, or a peer mentor program to support students transition to a new country, culture, and educational system.
- Coordinate with the Math and Writing Centers, and other campus partners to provide academic support.
- Create and implement a workshop series to support international student success through provision of skills, training and awareness on a variety of topics.

## Aztec Mentor Program Software -- \$54,099 (Base), \$13,999 (One-Time)

### Background

The Aztec Mentor Program (AMP) is an initiative that pairs eligible Juniors, Seniors, and Graduate students from all majors in one-on-one mentorships with established alumni/professionals in San Diego and nationwide. AMP provides an opportunity for students to gain valuable guidance on a variety of career-related topics including one-on-one advice, networking, interviewing and job shadowing. Mentors have the opportunity to share their knowledge and expertise, and give back to the Aztec community.

AMP has contributed to increasing alumni affiliation with campus and advancing student success. Currently **94%** of the more than **1,600** mentors are alumni. Student involvement has increased **275%** during AMP's first three years, from **348** to **1,266**.

### Challenge

Currently, the review of individual student applications and the matching of students with mentors are done manually. Although innovative, the current process cannot sustain the program's growth, and provide the administration and accountability required.

### Cost

The Base and One-Time funding will be utilized to purchase a mentor management software. The software will provide the infrastructure necessary to automate the matching of students with mentors, as well as the tracking and reporting of the program's effectiveness.

#### Start-Up Costs (One-Time)

• Set-Up Fee	\$8,999
• Data Sync (Year 1 differential)	\$3,500
• Custom Domain	<u>\$1,500</u>
<b>Total One-Time:</b>	<b><u>\$13,999</u></b>

#### Annual Recurring Costs (Base)

• Subscription Fee (Up to 3,000 Users)	\$42,599
• Program Tracks (3 @ \$3,000/year)	\$9,000
• Data Sync (Year 2+)	<u>\$2,500</u>
<b>Total Base:</b>	<b><u>\$54,099</u></b>

## Educational Opportunity Program Learning Support Center -- \$20,000

### Background

The Educational Opportunity Program (EOP) at San Diego State University is the largest in California, providing services and academic support to low-income, first generation college students. EOP administers several programs under three main umbrellas – 1) Outreach, Recruit, and Admission; 2) Counseling and Learning Support; and 3) Special Programs. These programs include the EOP counseling services, the Center for Academic Assistance and Tutoring (CAAT), the Guardian Scholars program (foster youth), Services to undocumented students, Summer Bridge, and Transfer Bridge. Additionally, EOP employs many graduate students and undergraduate student assistants, as well as student interns. Students who interact with EOP utilizes all facets of physical space at different times and in different ways.

### Current Center

The Center for Academic Assistant and Tutoring (CAAT) is located inside the EOP offices on the second floor of the East Wing of the Student Services building. Currently, the center provides tutoring services, quiet study space, and a student lounge. Our goal is to transition the current center from its current lounge/tutoring center concept to a learning support center that provides cutting-edge learning focused services and promotes undergraduate students' growth, progress toward graduation, and overall success.

### New Center

The base funding will be utilized to facilitate the transition to a learning support center by:

- Meeting the funding gap to hire a coordinator to provide oversight and leadership to facilitate a learning center that is professional, inviting, and facilitate student development.
- Developing programming that will allow students to develop social, academic, and critical thinking skills and to explore different ways of learning.
- Facilitating academic success through skill building, curricular and co-curricular learning, and high-impact engagement opportunities.

### Goals

The goals for the EOP Learning Support Center are:

- Provide an open, efficient, flexible, programming space that fosters learning for EOP students.
- Provide programming and workshops relating to student success, financial literacy, leadership, study abroad, campus initiatives, graduate school, and other student centered topics.
- Provide deeper learning and engagement.
- Provide a support model that improves learning outcomes.
- Improve retention rates, graduation rates, alumni satisfaction.

## One SDSU Community Program -- \$65,000

### Background

In Fall 2013, San Diego State University (SDSU) and the National Conflict Resolution Center (NCRC) embarked on a program based on a concept of Integrative Diversity. The concept focuses on the changing landscape of higher education in the United States. The racial/ethnic makeup of college students is changing. At SDSU there is no majority racial/ethnic group; we are ranked 19th in the nation in for racial diversity; and we have an increase in military veterans and students with disabilities. With this increased diversity on campuses, there was no plan on how to leverage it.

The Integrative Diversity strategic planning committee was charged to create a series of programming activities leveraging diversity at SDSU across all aspects of the campus community. The One SDSU Community program was created to identify and promote the intersectionality of the campus' diversity, to build the foundation for inter-group dialogue, and to create a community of Aztecs.

To date, **9,112** attendees participated in One SDSU Community programs in the 2015-16 academic year, an increase of **51.9%** when compared to the 2014-15 academic year (6,000).

### Cost

This program is a partnership with many campus departments. A committee of students and staff lead by Student Life and Leadership and the Center for Intercultural Relations develop programs each semester. As the program grows and matures, the cost to produce the large scale programs increases as does the need for marketing the activities.

• Program Speakers, Films & Activities	\$50,000
• Marketing	\$10,000
• Tracking and Assessment	<u>\$5,000</u>
<b>Total:</b>	<b><u>\$65,000</u></b>

Division of Student Affairs – One-Time Funding Request (FY 2016-17)

## Aztecs Hiring Aztecs! Advertising Campaign -- \$108,100

### Background

Aztecs Hiring Aztecs! (AHA!) is an initiative to promote career opportunities for students in the Aztec community. Student Affairs is piloting an advertising campaigns to promote the Aztecs Hiring Aztecs! (AHA!) brand, and to align the initiative with existing efforts to encourage alumni to hire recent graduates or increase the participation of graduating students in the graduate outcome survey. As of Fall 2015, **49.1%** of the students who responded to the survey reported full-time job placement at graduation, a **7.1%** increase when compared to Spring 2015.

### Campaign

The one-time funding will be utilized to initiate a print and social media campaign, to hire support staff to create and monitor the activities of print and social media material, as well as other costs.

#### Media (print and social)

• Print: Performance (12 months / 1 page per month)	\$30,000
• Print: Southwest	\$15,000
• Social: Facebook	<u>\$7,200</u>
<b>Sub-Total:</b>	<b>\$52,200</b>

#### Support Staff

• Social Media Interns (2)	\$19,200
• Graphic Design Interns (2)	<u>\$19,200</u>
<b>Sub-Total:</b>	<b>\$38,400</b>

#### Supplies & Services

**Sub-Total: \$17,500**

**Grand Total: \$108,100**

### Goals

The goals for this campaign are:

- Increase and enhance brand awareness among alumni, parents and community stakeholders within San Diego and the western states region.
- Identify and measure the brand potential of AHA!.
- Increase reported rate of full-time job placements at graduation.

## Educational Opportunity Program Renovation -- \$750,000

### Background

The Educational Opportunity Program (EOP) at San Diego State University is the largest in California, providing services and academic support to low-income, first generation college students. EOP administers several programs under three main umbrellas – 1) Outreach, Recruit, and Admission; 2) Counseling and Learning Support; and 3) Special Programs. These programs include the EOP counseling services, the Center for Academic Assistance and Tutoring (CAAT), the Guardian Scholars program (foster youth), Services to undocumented students, Summer Bridge, and Transfer Bridge. Additionally, EOP employs many graduate students and undergraduate student assistants, as well as student interns. Students who interact with EOP utilizes all facets of physical space at different times and in different ways.

### Current Space

The EOP office is located on the second floor of the East Wing of the Student Services building. This not been renovated since the opening of the Student Services East building over 20 years ago. In addition, the space was previously occupied by two departments, as such the layout of the interior space was not designed to best support EOP's programming and services. Our goal in this renovation is to design a space that is intentional, functional, student centered, and encourages optimal work and organizational flow.

### New Space

The one-time funding will be utilized to renovate the existing space, to achieve the following:

- Transform the existing CAAT center into a Learning Support Center, as well as creating two new student centered space for Guardian Scholars, and for Education Without Borders (EWB)/Dream Act/AB540.
- Update student programming spaces.
- Update staff meeting spaces.
- Update staff office spaces.
- Update EOP entrance/front office spaces.

### Goals

The goals for the renovated space are:

- Provide a dynamic and expanded learning space that is open but adaptable to meet the various programming needs.
- Provide a space that allows greater cross-campus collaboration, and enhance student access to campus resources.
- Provide a space that encourages student leadership, collaboration, and cross-pollination for student organizations.
- Provide a space for EOP staff that enhances collaboration, communication, and efficiency.

## Office of Financial Aid & Scholarships Renovation -- \$625,000

### Background

The Office of Financial Aid and Scholarships (OFAS) determines student eligibility for federal, state, and institutional financial aid funds and private/institutional scholarships. The Office's broad range of responsibilities includes awarding over \$250 million of financial aid and scholarship funds coordinated and administered by the university each year, counseling students and parents about availability and eligibility criteria for all aid programs, coordinating reporting responsibilities with all funding sources, and managing aid delivery in a timely and accurate manner.

Approximately **59%** of the total student population receives some form of financial aid and/or scholarship award. During the 2014-15 academic year the OFAS assisted **25,907** students/parents at its service counter.

### Current Space

The OFAS office is located on the third floor of the Student Services West building. The office has not been renovated since it opened over 20 years ago. The current lobby and student service area do not allow for private counseling sessions and can only accommodate assisting three students at any given time. The lack of lobby space results in lines forming in the hallway outside OFAS in the hallway which is shared by classrooms and other offices on the third floor.

### New Space

The one-time funding will be utilized to renovate the existing space, to achieve the following:

- Expand the existing lobby and adjacent spaces to include an initial waiting area and an overflow waiting area that can be used to conduct information sessions, focus groups, and campus training.
- Create 5 new student/parent confidential meeting rooms.
- Create 5 new interior offices that can be utilized as confidential meeting rooms with students/parents.

### Goals

The goals for the renovated space are:

- Provide a space that is student-centric and that fosters an atmosphere of accessibility on campus.
- Provide a welcoming, less crowded, and more private space for students and families to meet with OFAS professionals.
- Provide a venue for OFAS staff to collaborate and communicate with groups of students, parents, and SDSU staff.



## The Pride Center and Women's Resource Center Infrastructure -- \$33,650

### **Background**

In the 2013-14 academic year, Student Affairs began utilizing the space that formerly served as the Student Organization Annex. This space is located on the South-West corner of Campanile Drive and Lindo Paseo, and is currently serving as the home of The Pride Center and Women's Resource Center.

### **Challenge**

When The Pride Center moved into the space in the 2013-14 academic year, it was discovered that the space had limited communication, network and security infrastructure in place. Specifically, the space was not physically connected to the campus's phone, network and security infrastructure resulting in the center's inability to have access control, campus phone extensions, internet connectivity, panic alarms, etc. This posed safety concerns to the students and staff in the space, among other issues.

Working with Telecommunications & Network Services (TNS), a temporary connection to the campus was made possible via a virtual network using an internet subscription from Cox cable. However, the quality of the connection was inconsistent, resulting in frequent disconnections.

### **Solution**

In the 2015-16 academic year, work began to physically connect the space to the campus phone, network and security infrastructure. Specifically, trenching and installing an underground conduit, and running fiber and copper cables from the campus to the space. In addition, TNS installed new wireless access points throughout the space. The result was fast and reliable internet connectivity, phone connectivity, access control and panic alarms.

The one-time funding will be utilized to fund the construction and installation of this infrastructure.

**University Relations and Development  
PBAC Budget Requests - FY 2016/2017  
One Time and Base Budget Requests**

<b>Division</b>	<b>Department</b>	<b>Description</b>	<b>One-Time Reserve Requests Amount</b>	<b>Base Budget Requests Amount</b>
URaD	Alumni	Direct Mail	100,000	
URaD	Marcomm	Branding & Marketing	100,000	100,000
URaD	Marcomm	360 Magazine	25,000	
			125,000	100,000
URaD	Planned Giving	Planned Giving Marketing	75,000	
<b>Total UR&amp;D FY16/17 One-Time PBAC Requests</b>			<b>300,000</b>	<b>100,000</b>



## **Alumni Engagement PBAC Requests**

**Alumni Engagement:** *\$100,000 one-time budget request*

Consistent with FY 2015/16 PBAC allocation, the Alumni Engagement/Annual Fund office is requesting \$100,000 in one-time funding for the following direct mail project in 2016/2017:

- Direct mail for the Annual (SDSU) Fund:
  - Fiscal year to date (FY 2015/16), Alumni has mailed out 152,846 solicitations resulting in connecting with 1,450 donors (82% are alumni) and receiving donations totaling \$128,574.
  - Alumni anticipates ending the fiscal year connecting with 1,900 donors and receiving at least \$172,000 in donations.
  - With this funding, Alumni expects to at least match the anticipated FY 2015/16 results but with potential for expansion. Alumni will decrease the cost per piece of each mailer utilizing a broad-based approach to mailers, as opposed to the costly targeted pieces; as well as a strong emphasis on retaining previous donors.

Continuing to support the direct mail campaign also has the following benefits:

- Direct mail provides a supplemental touch point to solicitations initially made via phonathon or electronic-solicitations.
- Direct mail is an alternative to credit card payments via phone or giving on-line; some donors prefer sending a check because they feel that it is more secure.
- Direct mail also offers an additional tool for data collection in a variety of ways: donor updates their addresses directly, USPS notifies of a bad address, and USPS forwards back a new and accurate address.



## SAN DIEGO STATE UNIVERSITY

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### **Marketing and Communications PBAC Requests**

#### **Branding and Marketing:** *\$100,000 base budget request and \$100,000 one-time budget request*

The San Diego State University national branding and marketing program has shown increased success each of the first three years of its implementation. In the first six months of this fiscal year, the program produced more than 24 million Facebook impressions, 1.8 million Twitter impressions and 67 thousand YouTube video views of our content and messaging.

The national branding and marketing program is intended to be a brand awareness and education campaign in support of several university initiatives. Those initiatives each have seen growing success over the last couple years as well. We believe the role branding and marketing has played in the success of each of these initiatives has been critical and should be sustained in the coming year:

- The Campaign for SDSU: Well on its way to reaching \$750 million goal. 2014/15 was the best fundraising year ever at SDSU, with \$97 million raised.
- Out-of-state recruitment: Applicant numbers continue to rise. And applicants from the markets that branding and marketing is specifically targeting have all seen an increase.
- Rankings: SDSU continues to climb a variety of national rankings. Some notable rankings include the No. 8 entrepreneurship program by US News & World Report and the No. 5 International Business program. SDSU is listed as No. 60 out of 477 national public universities and No. 7 of the 29 California institutions in The Business Journal's annual rankings. And SDSU was listed as one of FORBES's most entrepreneurial universities.

To continue to support those and other university initiatives, we request the following funds to maintain our current marketing and branding levels. Our goals for the coming year will be to increase all measurable metrics by at least 10% over the previous year.

#### **360 Magazine:** *\$25,000 one-time budget request*

In the final year of The Campaign for SDSU we feel it is important to once again publish three issues of 360 Magazine. We are requesting funds to cover costs associated with publishing and distributing the magazine to our growing donor base three times next year.



## SAN DIEGO STATE UNIVERSITY

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### Office of Planned Giving PBAC Requests

#### **Planned Giving:** *\$75,000 one-time budget request*

To maintain the success of discovering planned gifts, this request of \$75,000 is for continued and enhanced marketing budget after three fiscal years of receiving University Support. From this funding we have had success in receiving notifications of planned gifts and need to keep up the momentum of Legacy messaging of planned gift options in the final year and push of The Campaign.

So far this fiscal year, we have been notified of over **\$10 million in planned gifts, over 80% increase** over last year at this same time. The compound marketing efforts of print, radio, newspaper, direct mail, segmented and targeted mailing based on in-house predictive modeling in partnership with the prospect research team have reached over **600,000 households**. On average it is by about the **fourth** mailing our donors receive, they indicate that they have included SDSU in their estate plans.

In 2014-2015, we received \$50,000 in funding, we mailed to 12,198 recipients. We received notification of bequests totaling **\$5.9 million; a 23,056% return**.

In 2013-2014, we received \$52,000 in funding, we used \$39,000 in funding to contact 1,500 planned giving prospects through two campaigns of the Legacy Leaders bequest calling program discovering **\$538,000** in bequests, over 200 donors committed to a bequest. We continue to cultivate additional prospects from the calling campaigns. We used \$13,000 in funding to mail to 10,000 recipients. We received notification of 44 bequests totaling **\$407,500**.

It is imperative based on our results, we continue our aggressive efforts to the end of the campaign to find SDSU legacies, so we may guide, acknowledge and recognize these important gifts.

