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Memorandum

TO: Mildred García, Ed.D.  
University President

DATE: May 28, 2017

FROM: Michael Shafae   
Chair, Planning, Resource, and Budget Committee (PRBC)

SUBJECT: PRBC Recommendations for FY 2017-2018

I am pleased to submit for your consideration the Planning, Resource, and Budget Committee's (PRBC) recommendations on planning, strategic priorities, and budgetary matters for FY 2017-2018. The recommendations presented herein reflect the committee's discussions regarding the financial context in which the University operates, the budget outlook for the next fiscal year, and the strategic and operational priorities identified throughout the past year. May the committee's recommendations prove helpful as you work with the division heads to finalize next year's budget.

#### CSUF FY 2017-18 Budget Outlook

As you know, the recent BOT's student tuition fee increase will allow the student success initiatives (i.e. GI2025) to continue across the system. However, the Governor's May Revised budget falls short of our hopes for additional funding of operating funds (in fact it reduced CSU's by \$4m). This budget exacerbates the funding needs next year at Fullerton and, with no increase in baseline enrollment, our baseline funds would remain flat creating additional challenges. In addition, our funding rate per FTES continues to be the lowest in the system and will likely fall further behind in 17-18 given the CO's budget allocation methodology for next fiscal year, as will be discussed further below.

Baseline funding liability of roughly \$3.2M for the 1% salary increase associated with current contracts will continue into next fiscal year. This needs to be addressed in 17-18 whether permanently or on a one-time basis depending on the availability of baseline funds.

#### Recommendations

In an environment of financial uncertainty, CSUF has accomplished much with the limited resources available. The question that the committee poses is: what *could* we accomplish if CSUF was funded at a level comparable to a similarly sized CSU campus? The University has successfully managed the challenges it has faced and delivered outcomes better than similarly sized public comprehensive universities. The committee's recommendation prioritizes categories aimed at what the campus must do to achieve strategic goals, recognizing that structural inequalities exist and often prohibit the campus leadership pursuing aspirational university goals that transcend the CSU goals and aligned to Cal State Fullerton's mission of granting access and a comprehensive, liberal education where learning is preminent.

Of the twenty-three CSU Campuses, CSU Fullerton receives the lowest level of funding, and that has

been a detriment to our mission, our faculty, our programs, and ultimately our students. While we have been able to make progress by careful and strategic use of one-time savings, CSUF leaders must continue to advocate for additional state investment in the CSU, as well as for additional CSU investments in our University. At a minimum, this advocacy may slow the continued inequities that have negatively impacted our students and the provision of a stable funding base from which we can carry out the mission of the academy. The PRBC firmly believes that, if CSUF were funded on par with the other CSU campuses, there is no end to what this University could achieve as a model for closing the opportunity gap, ensuring success for all students, and providing the necessary support for faculty, staff and operations required to carry out the latter.

In addition to equitable funding, deferred maintenance of campus facilities continues to be a PRBC concern. The committee appreciates the significant investment made in classroom and other improvements, many of which address life and safety concerns across campus and provide for a more welcoming teaching and learning environment. However, current projects cover only university and larger division deferred-maintenance priorities. Additional deferred maintenance and facility improvement funds are needed at the college and department/program level to ensure proper and safe learning environments that do not hinder progress towards our University's strategic goals.

For consistency with previous budget cycles, the PRBC recommends that, after accounting for new mandatory costs, contractual costs, and continuing commitments, any decisions regarding the allocation of new funding, the reallocation of existing funding, and the strategic investment of campus reserves be classified under the following nine major budget categories prioritized in descending order:

- *Graduation Initiative 2025*
- Operationalizing the University's Strategic Plan
- Capital and Facilities Infrastructure Projects
- Faculty Hiring, Retention, and Tenure Track Density
- Reinvesting in Instructional & Support Infrastructure
- Mission Critical and Compliance Initiatives
- Strategically Addressing Structural Deficits
- *WASC Reaccreditation*
- Core Operations Critical to Advancing our Institutional Mission

The addition of Graduation Initiative 2025 and WASC Reaccreditation to the budget categories acknowledges their immediate importance and impact on planning and resource use. Additional detail on the PRBC's priorities, in descending order, is provided below.

#### **1. Graduation Initiative 2025**

The University's long-term plan to close the achievement gap and ensure the success of all students is the committee's highest priority. To achieve the goals of the initiative, the University will add additional course sections, identify and remedy bottleneck courses, invest in course redesigns, increase tenure density through hiring, continue our investment in High Impact Practices and strengthen academic advising and the first-year experience, amongst other efforts. This priority intersects with two other PRBC priorities: Faculty Hiring, Retention, and Tenure Track Density; and Operationalizing the University's Strategic Plan.

2. **Operationalizing the University's Strategic Plan**

The committee recommends addressing staffing needs across the campus by filling vacancies, increasing staffing to accommodate work resulting from increased enrollments and expanded requirements where necessary, providing opportunities for professional development, and providing in-range progressions. Since the scholarly output has increased the committee recommends investing in Research Grant Specialists and interdisciplinary research initiatives to sustain scholarship activities that ultimately address CSUF's Strategic Aim #4. In addition, the committee recommends continuing the University's investment in Faculty Support and Instructional Delivery Services, including Online Education and Training, the Faculty Development Center, Academic Technology Center, and leadership training for chairs.

3. **Capital and Facilities Infrastructure Projects**

CSUF's Library of The Future (LOFT) project and repairs to the library's south wing are high priorities for the committee. In addition, in the three years that the south wing has been closed, the north wing has seen increased traffic and use, which may necessitate repairs, new furniture and refurbishment sooner than expected. The committee also recommends addressing critical university and division deferred maintenance projects, with top priority for the McCarthy Hall remodel, the Langsdorf Hall remodel (to update and properly configure space for Strategic Enrollment Management with Admissions & Records), and capital and facility needs of the Irvine campus, including advisement, faculty offices, security cameras, signage and branding needs. Further, to ease the high need for space, relocation costs, and facility improvement funds should be made available to backfill the valuable space becoming available from the opening of Titan Hall.

4. **Faculty Hiring, Retention, and Tenure Track Density**

The priorities in this category intersect with those of GI 2025 and the third goal of the University's Strategic Plan. CSUF has continued to recruit and retain a diverse community of teacher-scholars who work diligently to advance our mission. To improve tenure density, the institution should continue to hire and consider all avenues available to appoint and support new tenure track faculty members. The PRBC recommends sustaining and extending gains in net tenure track hiring and pursuing competitive lab, studio, and other startup funding for new tenure track hires.

Funding for faculty promotions is a recurring commitment to be addressed. And, because hiring over the past decade has created a larger population of faculty members who have active research programs and are eligible for sabbaticals, the committee recommends budgeting for additional sabbaticals. The continuation of the support provided for Academic Senate service is also recommended.

Grappling with enrollment changes, over enrollment, funding for re-assigned or additional faculty efforts at current Chancellor's Office levels are often addressed with one-time monies. To actualize the University's goals, adequate funding for these priorities is needed.

5. **Reinvesting in Instructional & Support Infrastructure**

The growth of the campus has placed pressure on the instructional and support infrastructure. The committee prioritizes a continued commitment to classroom refurbishment and extending that commitment to renewing and upgrading computer labs and specialized/instructional lab

equipment. Not only does this funding ensure that our instructional spaces are in working order, but lab and non-lab equipment funding is critical to maintaining student learning experiences that are meaningful and valuable across all disciplines.

All of the University's programs are enriched by the varied software tools available to students and faculty. With any investment in computer labs, a commensurate investment in software is recommended. And in turn, many programs rely on foundational digital tools that require a financial commitment in both hardware and software to remain relevant in their respective fields. The same holds true for investments in digital platforms that support student and faculty success.

Inflation perpetually increases the costs the library must bear. The committee recommends continuing the commitment to acquiring materials to support the mission of the University and to provide funds to combat inflation.

Year-Round Operation (YRO) instruction is a vital lifeline for students seeking to move steadily and expediently towards their degree objective. The committee recommends continued funding for the Operating Expenses & Equipment (OE & E) costs arising from YRO instruction.

**6. Mission Critical and Compliance Initiatives**

Items that fall in this category can be considered mandatory spending. Priorities such as Title IX and the Clery Act have costs that the University cannot defer or ignore. In addition to these two priorities, the PRBC recommends addressing studio and lab safety compliance and disability support services.

Furthermore, the committee recommends prioritizing ADA section 508 compliance, particularly video captioning.

**7. Strategically Addressing Structural Deficits**

While support for strategic initiatives and student success efforts is necessary, it is equally important to address structural deficits and ongoing commitments funded as one-time in the past. Of particular urgency is enrollment management, prior year base-line enrollment increases that were one time funded, prior year base-line salary increases that were one time funded for faculty and staff, division staffing structural deficits, and minimum wage increases. Divisions have also not seen general increases in OE & E funding to keep pace with inflation and enrollment growth

**8. WASC Reaccreditation**

The reaccreditation process is a time for reflection and allows the University to provide input to and evidence of efforts and progress made in the areas outlined by WASC. Consistent with each reaccreditation review ramp up, funds are needed to support campus efforts associated with preparing our reaccreditation submission to WASC.

**9. Core Operations Critical to Advancing Institutional Mission**

The University's investment in student advising has paid dividends and the committee recommends continuing to invest in student advising. A component that is missing in the student advising tool kit is a graduate student Titan Degree Audit (TDA). The TDA is an

indispensable tool to keep students on track to graduation and to record advising notes. This option will offer critical support for graduate students.

Student advising and support, curriculum and faculty development is affected by the many software programs that we use, such as EAB, Intelliresponse, College Scheduler, Curriculog, Acalog, and Interfolio. These software programs are funded on one-time monies and represent additional commitments against available OE & E. The committee recommends baseline funding for these critical tools.

The committee recommends changing special academic programs, such as the Doctorate in Education, Doctorate of Nursing Practice, and KDN from partial baseline and one-time funding to full baseline funding.

CSUF's graduate and professional programs continue to grow, attracting talented graduate students from around the world. However, competition is fierce. An aspiration of the committee is to sustain excellence and growth through graduate, teaching associate tuition waivers.

Finally, the PRBC recommends that your administration maintain the principles that have guided previous budget allocations: the budget must be balanced; the budget must be aligned with the University's strategic priorities and institutional mission; and the University reserves should be at a sufficient level to address contingencies.

### Conclusions

In closing, the PRBC would like to again emphasize that its recommended budget priorities were carefully chosen to align with the University's core mission. Faced with the shifting landscape of challenges in the way we are funded by the state and by the Chancellor's Office, CSUF's Academic Master Plan along with its Strategic Plan serve as map and compass to maintain and assert the vitality of our institution through the effective use of limited resources.

Cc: Anil Puri, Interim Provost and Vice President for Academic Affairs  
Emily Bonney, Academic Senate Chair  
Danielle Garcia, Deputy Chief of Staff  
Dave Mickey, 2017-18 PRBC Chair