November 8, 2019

Dear Colleagues,

We are pleased to officially launch the budget planning cycle for the 2020-21 fiscal year (FY21) that will advance our University Strategic Initiatives and our progress towards meeting our Graduation Initiative 2025 (GI 2025) goals and facilitating an interdisciplinary, multicultural, international and community engaged education. The process outlined below provides background information and describes the drivers to advance our work in promoting access, student success, completion and eliminating the equity gap.

**University Strategic Initiatives**

To strengthen the goal of connecting resource allocation to strategic investments, we have embedded the Strategic Initiatives budget request process (one-time funds) into the FY21 budget process. The Strategic Initiatives are as follows:

1. Educational Excellence: Ensuring students graduate with the high-level knowledge, skills and experience necessary for engaged citizenship and career success.

2. Student Success: Ensuring all students progress to degree completion in a timely manner regardless of their background.

3. Inclusive Excellence: Fostering a campus culture that advances inclusive excellence.

4. Capacity and Sustainability: Taking action to sustain and advance a robust University in an era of declining state support.

**CI Budget Overview**

The context for the FY21 operating budget is primarily set by three factors: the submission of the 2020-21 Support Budget by the CSU Chancellor’s Office (CO) as presented and approved by the Board of Trustees (BoT), the actions to be taken by the State Legislature and the Governor, and the strategy and planning by the campus.

The following planning process applies to the operating fund as well as all other funds (auxiliary organizations/public entities, designated operating funds, auxiliary enterprise funds, other trust funds). As with prior years, this planning process is comprehensive and will include planning for reserve requirements and campus space needs.

The Strategic Initiatives and GI 2025 goals are top priorities for the University and divisional plans should reflect alignment with this direction. These submissions, as well as forms described later in this memo, are due to the Budget & Planning Office by January 31, 2020.

Budget discussions will commence with Cabinet and SRPC in early February 2020.
Goal

The goal of the budget resource planning process is to create a balanced and sustainable ongoing budget that supports the University’s Strategic Initiatives and GI 2025 goals. This involves strategic investments, assessing capacity, and reallocating existing resources to align with divisional and university priorities.

Guidelines

In developing the FY21 budget, the following parameters are provided:

- Align resource allocations to support sustainable operations in relation to our Strategic Initiatives and GI 2025 goals;
- Incorporate on-going accountability (reallocations or other actions to demonstrate how the Division has adequately assessed capacity) into the resource allocation process;
- Engage in planning to successfully support the targeted 2% new student FTE enrollment growth;
- Ensure transparency;
- Protect resources for strategic investment during times of economic uncertainty;
- Use challenging times as an opportunity for innovation.

Initiating the FY21 Process

The Chancellor’s Office presented to the Board of Trustees a preliminary framework for the 2020-21 CSU Operating Budget request to the governor and the Department of Finance at its September 24-25, 2019 meeting. The following priorities were outlined:

- Fully fund Graduation Initiative 2025
- Fulfill CSU’s portion of statewide degree gap - 480,000 by 2030
- Eliminate deferred maintenance and invest in new facilities
- Ensure employee salaries and benefits keep pace with inflation
- Continue to pursue a multi-year budget model to help inform all stakeholders of the financial investments necessary for future success

Using feedback provided by trustees at the September 2019 meeting, Chancellor’s Office staff will present an updated and detailed operating budget recommendation for the board’s approval in November 2019.

CSUCI Campus Planning

While the activities and actions to be finalized by the Chancellor’s Office occur, our campus will begin its budget development planning cycle. For your reference, historical and current documents, presentations, and reports can be found on the SRPC website located at http://www.csuci.edu/strategic-resource-planning/.
The planning schedule for the FY21 planning is included in Attachment 1. Budget submissions, for all funds, are due to Budget & Planning (B&P) by **January 31, 2020**. Submissions should focus on alignment with Strategic Initiatives and GI 2025 goals.

In support of the Institution’s commitment to all funds budgeting, an overview of budget requirements is provided in Attachment 2.

To support CI’s commitment to transparency and accountability, budget requests again include a set of questions for response by all areas. These supplemental questions in Attachment 3 are intended to inform the budget requests at the divisional and unit levels.

Historical information is summarized by division in Attachment 4. This attachment includes by division, historical salary by employee category and FTE information.

Finally, a reference listing of reporting units/departments that must submit budget information is provided in Attachment 5. All divisional budget submissions must be recorded in the Budget Request Workbook in Attachment 6. The Budget Request Workbook contains specific instructions for permanent funding requests, reallocations, Strategic Initiative Proposals, fee increases and use of reserves.

For questions pertaining to the preparation of materials, please email to Barbara Rex at Barbara.Rex@csuci.edu.

Sincerely,

Elizabeth Say, Ph.D.  
Interim Provost

Ysabel Trinidad  
VP for Business & Financial Affairs, CFO

cc: President Erika D. Beck, Ph.D.

**Attachments**

1 – FY21 Summarized Budget Development Planning Schedule
2 – All Funds Budgeting Requirements
3 – Supplemental Questions
4 – Divisional Data Summaries
5 – Divisional Report Units/Departments Listing
6 – Budget Request Workbook (Excel template)
FY21 Summarized Budget Development Planning Schedule

2019

October 11  
Student Fee Advisory Committee begin meetings for FY21; Cost Allocation plan discussions begin; Reserve allocation discussions begin

November 7  
Strategic Resource Planning Committee (SRPC) meeting; Launch of FY21 Planning and current year budget updates

November 8  
FY21 Budget Instructions distributed to Campus Budget Heads and posted; FY21 Divisional/Unit Budget Preparation officially begins

November 8 - January 31, 2020  
Divisions/Units prepare FY21 budget requests based on unit-divisional goals and objectives and linked to the University’s strategic plan goals

December 13  
Fee Increase Requests due to Budget & Planning; Will be vetted by Cabinet with final decisions to be made in mid-January; If approved, include in budget submission

2020

January  
Governor submits budget to Legislature

January 31  
FY21 Budget Request Workbook and FY21 Strategic Initiative Proposal Questionnaires due to Budget & Planning

January 31  
Budget & Planning begins initial review of FY21 budget submissions

February  
Cabinet budget discussions take place  
SRPC convenes to provide input on FY21 budget submissions

March  
Preliminary draft budget prepared based on divisional requests

March  
Campus Town Hall meetings take place to present proposals by divisions to the campus community

April  
Vice Presidents complete plans for their respective division and share final plans with SRPC/SI

May  
Final FY21 Budget recommendations to President

May  
Hyperion B&P open for input for all units for FY21 budget

May  
Governor’s May Budget Revise

June  
Hyperion closes for further input for all units

June 15  
State Legislature passes annual Budget Act

July  
President approves FY21 final budget
All Funds Budgeting

CSUCI has adopted an all funds approach to budget planning in order to provide an enterprise-wide view of fiscal resources. This comprehensive financial framework incorporates all operating funds into the official university budget. The all funds budget model ensures strategic resource allocation decisions are made with an understanding of all available funding sources and uses. Accordingly, the FY21 planning cycle presents an opportunity for all units to review existing budgets, evaluate future funding requirements and ensure budgets are established for all areas including those utilizing trust funds. This is a necessary step to solidify a comprehensive institutional view of all sources and uses of funds.

Commencing with the FY 21 planning cycle, departmental budgetary spend plans are required for the following areas. Plans must address how fund balances will be utilized in the coming year. Should fund balances exceed policy limits, a plan to bring balances in line with acceptable levels must be submitted.

- IRA/MST
- Extended University Campus Partners (TH920)
- Lottery
- All units with activity in Trust Fund TM905 (including but not limited to Channel Islands Boating Center and Channel Islands Cooperative Research Station)

The following self-support and partially subsidized units are required to submit a five-year revenue and expenditure forecast in addition to the FY 21 budget plan. Baseline assumptions including applicable fees/rates and escalation factors plus intended use of fund balances must accompany the forecast.

- Extended University
- Conferences and Events

As in previous years, multi-year proformas must be submitted for all units that currently hold debt obligations. This includes Housing, Parking, ASI and University Auxiliary Services. A 20-year forecast must be maintained and include sufficient reserve levels for debt coverage. Baseline assumptions including enrollment, fees/rates, compensation escalation, etc. must be documented. Reserves designations, major capital investment plans must be incorporated.

Please note that additional instructions concerning proforma requirements are provided in the Budget Request Workbook.

Below, additional context and instructions regarding all funds budgeting is provided.

**Auxiliary Enterprise Funds** are self-support units but not separate legal entities. The auxiliary enterprise funds include Housing, Parking and Extended University. These entities generate revenue by various means such as through the collection of tuition for an Extended University course, the collection of parking fees from faculty, staff and students, and finally housing fees for students who reside in campus-managed student housing. If bond debt has been issued to support facilities, each of these entities must
ensure that bond debt is covered first, and then operations with funding set aside for reserves. Funds cannot be transferred from state appropriations to cover the expenses for these units. Therefore, these enterprises must ensure that enough revenue is collected to cover operating expenses, reserve contributions, debt service payments, and any related cost recovery charges. Additionally, if bond debt has been issued, budgets should closely align with financial proformas prepared at the time debt was issued. B&P keeps the proformas updated with prior year’s actuals and workbooks are available through B&P at any time. If substantial variances exist, they must be reviewed with B&P and explained in detail to ensure that the campus will comply with the Debt Service Coverage Ratio requirements mandated by the Chancellor’s Office. **Budgets must be submitted to B&P by January 31, 2020.** Once reviewed B&P will forward to the VP for Business & Financial Affairs and the President for final approval.

**Designated Operating Funds** are also known as Category 2 Mandatory Student Fees. The Student Fee Advisory Committee (SFAC [http://www.csuci.edu/sfc/](http://www.csuci.edu/sfc/)) oversees all student fees. Each fee has an advisory committee which reviews individual requests, historical financial information and recommends a budget to the SFAC. Each advisory committee should prepare a detailed recommendation framed around the University Strategic Initiatives based upon the estimated headcount for FY21. **These funds should all follow the timelines included in this memo.** Budgets are to be submitted to B&P by January 31, 2020. Once reviewed, B&P will forward to the VP for Business & Financial Affairs and the President for final approval.

**Auxiliary Organizations/Public Entities** are separate legal entities. The Auxiliary Organizations are Associated Students, Inc., CI Foundation, and University Auxiliary Services. These organizations are not-for-profit and perform essential functions associated with CI but are not supported by state funding (general fund appropriations). The Site and Financing Authorities are considered Public Entities and treated similarly to an Auxiliary Organization. Both types are governed by separate Board of Directors. Preliminary budgets are to be submitted to the central Budget and Planning department (B&P) by January 31, 2020. The date of anticipated approval by the appropriate board must also be included which must occur no later than April 2020. After the budget has been reviewed and approved by each entity’s Board of Directors, the approved budget and board packet should be submitted to B&P. B&P will then forward the budget to the VP for Business and Financial Affairs and the President for final approval.

**Reserve Request Requirements** apply to all funds and specific requirements exist for setting aside reserves to cover items such as economic uncertainty, future debt service, future construction, maintenance and repairs, and working capital. Please refer to the Policy on University and Auxiliary Operating Reserves that was approved on 10/17/2016. [http://policy.csuci.edu/fa/04/fa-04-002.htm](http://policy.csuci.edu/fa/04/fa-04-002.htm). B&P will be working closely with all fund managers to ensure that appropriate reserves are set up and any reserve spending is properly accounted for. Once reviewed B&P will forward to the VP for Business & Financial Affairs and the President for final approval.

Any requests for **Increases to currently established fees** must follow this timeline and coincide with any budget requests. This includes but is not limited to: student housing rates; parking rates; dining rates; conference & event rates; increases to operating fund generated revenue (Category IV Fees). All fee increases must first complete a due diligence analysis and vetting process with appropriate stakeholders prior to submittal. This should be approached as a consultative process and in some cases may require up to a 12-month lead time if fee increases are driven by capital construction with debt financing.

Fee increase proposals must be submitted to B&P by the respective governing entity (such as Student Fee Advisory Committee or respective Vice President) by December 13, 2019 unless a later due date has been authorized by B&P. Upon receipt of the proposal for fee increase, B&P will forward it to the VP for
Business & Financial Affairs and the President for final approval. If approved, the budget workbook should be updated to reflect the budget associated with the fee changes, which is due on January 31, 2020.

**Maintenance and Space Requests** should reference the Minor Capital Outlay Policy that was approved on May 3, 2016. This will serve as a resource for next steps to ensure that additional space needs requests are included in all divisional/unit budget submissions. The policy can be found here: [http://policy.csuci.edu/fa/04/fa-04-001.htm](http://policy.csuci.edu/fa/04/fa-04-001.htm).
Attachment 3
Supplemental Questions for Permanent Requests (Budget Workbook)

1. **Strategic Planning and Reporting.** Please provide an overview of your Division’s progress towards the Strategic Initiatives (1-2 pages per direct reporting unit/department; for all funds), as appropriate, along with progress toward goals. A listing of divisional units/departments is attached to identify these units in Attachment 5.
   a. Explain how your Division’s measurable and anecdotal goals support the Strategic Initiatives of the University.
   b. Discuss any reallocation of resources in your division to address operating needs changes that have already been addressed by your division. Please list the savings or cost avoidance as a result of reallocated resources, if applicable.

2. **New Funding Requests.** Please provide a description of new growth funds requested in the attached Funding Request Workbook (Attachment 6). One workbook for each fund. Include a summary of any operational risks that CI must work to mitigate over time. Note that new funding for strategic investment is limited and should not include any one-time set aside funds for Strategic Initiatives Proposals but may include any reference to how requested funds might support the separately requested one-time funds. Your summary should provide a clear sense of how your unit intends to minimize risk, maximize service, and if necessary, repurpose existing funds to do so.
   a. Address how your request supports the University’s Strategic Initiatives and the Trustees’ Student Success and Completion initiatives.
   b. Discuss any major budget challenges for the division in FY21.

3. **Space.** Considering your unit strategic plans please provide a short summary (1--2 pages at most per direct reporting unit/department/fund) that relates these plans to your current space assignment. You may wish to consider the following questions in your response:
   a. Does your current space inventory meet current programmatic requirements? Or, does the type or quality of the space place any constraints on your ability to meet program requirements? Please provide specific quality or space type concerns (location, specific quality concern, etc.).
   b. Will your unit be able to accommodate your growth plans within existing inventory of space? If additional space will be necessary, please describe the amount, type, or quality of additional space you may need to meet programmatic objectives and growth plans.

4. **Organizational Chart.** Please include a one-page organizational chart for your division to include total FTE regular employees. Highlight any new positions that are included in this request.
## Attachment 4
### Divisional Data Summaries

### California State University Channel Islands
#### Historical Staffing

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<td>56.0</td>
<td>4,346,647</td>
<td>56.0</td>
</tr>
</tbody>
</table>
Attachment 5
Divisional Report Units

Office of the President
University Ombud

Academic Affairs

Provost:
 › Academic Planning and Budgeting
 › Faculty Affairs
 › Student Academic Success and Equity Initiatives (SASEI)
 › Mission Based Centers
 › Teaching and Learning Innovations and Faculty Development
 › Santa Rosa Island Research Station
 › Academic Programs and Planning
 › Academic Senate
 › Research and Sponsored Programs

Academic Programs:
 › School of Arts & Sciences
 › MVS School of Business
 › School of Education

Library
Enrollment Management

Auxiliary Enterprise:
 › Extended University

Designated Operating:
 › Materials, Services, Facilities and Technology Fee (MSFT)
 › Instructionally Related Activities Fee (IRA)

University Advancement

Advancement
Communication & Marketing
Conference & Events
Career Development Services
Commencement
Development

Auxiliary Organization: Foundation
Business & Financial Affairs
VP Business & Financial Affairs
Administrative Services
Business Transformation
Facilities Services
Financial Services
Budget and Planning
Information Technology Services
Public Safety
Auxiliary Enterprise: Parking
Auxiliary Organization: University Auxiliary Services
Public Entity: Site and Financing Authority

Students Affairs
VP Student Affairs
Campus Life
Retention, Outreach, and Inclusive Student Services
Auxiliary Enterprise: Housing & Residential Education
Auxiliary Organization: Associated Students, Inc.
Designated Operating:
  › Recreation & Athletics Fee
  › Health Services & Facilities Fee
  › Student Body Center Fee
Your Budget Request Workbook is your passport to FY21 budget requests. The information in the workbook and responses to supplemental questions (attachment 3) must correlate. Please note that instructions for completing the Budget Request Workbook can be found on the first tab. This includes guidance on the one-time Strategic Initiative Proposal process which now follows the same timeline as the annual campus planning process.