



# Strategic Resource Planning Committee

Virtual  
Thursday, October 8, 2020  
2:00 – 3:00 PM

# Welcome

## Updates:

- September Town Hall Q&A posted on Sept 18
- Town Hall Divisional Presentations - Oct 8
  - Update on changes that have occurred in their divisions in response to the COVID-19 pandemic.

# Topics

1. Welcome (Provost Say)
  - Approval of September 3rd SRPC meeting minutes
  - Updates
    - September Town Hall Q&A posted on Sept 18
  - Meeting Objective: Share Communication Plan and present/discuss preliminary planning for 2020/21 permanent reductions
  - SRPC membership expansion
2. Communications (VP Ipach)
  - Central and Divisional
  - Divisions Reports (each division is prepared to provide updates on their communications)
3. Preliminary Planning for 2020/21 Permanent Reductions
  - Context
  - Reductions Goal
  - Central and Divisional
4. Next Meetings/Timeline

# SRPC Membership

## **Cabinet:**

Elizabeth Say, Interim Provost (co-chair)  
Ysabel Trinidad, Vice President for Business and Financial Affairs (co-chair)  
Richard Yao, Vice President for Student Affairs  
Nichole Ipach, Vice President for University Advancement  
Genevieve Evans Taylor, Chief of Staff

## **Faculty Representation:**

Gregory Wood, Professor – Physics and Academic Senate Chair  
Annie White - Assistant Professor - Early Childhood Studies and Senate Budget Representative  
Alona Kryshchenko, Assist Prof – Mathematics and Faculty-at-Large

## **Staff Representation:**

Annie Block-Weiss - Staff Council Chair  
Leticia Romero, Systems Analyst and Staff-at-Large

## **Committee Support:**

Barbara Rex, AVP of Budget, Planning, & Analysis  
Lisa Woods, Manager, Budget & Information Systems  
Teresa Montoya, Administrative Support Coordinator

## **Student Representation:**

Isaiah Ball - Student Government Chief of Staff and Student-at-Large  
Sergio Mercado - The CI View and Student-at-Large

# 2020/21 Budget Guidelines - Amended

*(Reviewed and discussed at May 7, 2020 SRPC meeting)*

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

- Align available resource allocation to **support sustainable operations** in relation to our Strategic Initiatives and GI 2025 goals that support student success;
- Incorporate on-going **accountability** (reallocations or other actions to demonstrate how areas have adequately assessed capacity) into the resource allocation process;
- Engage in **planning** to respond to potential fluctuation in enrollment and changes to state appropriations and tuition;
- Ensure **transparency**;
- Protect resources for **strategic investment** during times of economic uncertainty; and
- Use challenging time as an opportunity for **innovation**.

# Campus Communications

# Objective

Implement an integrated **Budget Communication Plan** at the **campus and division levels** to ensure **transparency** and **engender campus engagement** with addressing a **permanent budget reductions** due to the COVID-19 economic crisis.

# Create/Update Divisional Budget Web Pages

## CENTRAL BUDGET OFFICE

### **Budget & Planning (webpage)**

<https://www.csuci.edu/budget/budget-updates.htm>

*In the Red Navigation box on the right:*

**Links to Divisional Budget Pages**

## DIVISION BUDGET OFFICE

**Academic Affairs** <https://www.csuci.edu/apb/index.htm>

<https://www.csuci.edu/apb/budget-planning.htm>

### **Business & Financial Affairs**

<https://www.csuci.edu/vpbfa/division-budget.htm>

### **Office of the President**

Under Construction

**Student Affairs** <https://www.csuci.edu/studentaffairs/vpsa-office/fiscal-operations.htm>

### **University Advancement**

Under Construction



# Division Budget Page Contents

- Overview of Division Budget Planning Process
- Relevant Meeting Dates, Agendas, & Materials (as appropriate)
- Division Budget Presentations & Materials (include links to materials)
- Link to Budget & Planning and SRPC website

# SAMPLE - Division Budget Page

## Division Budget

Welcome to the budget web page for the Division of Business and Financial Affairs. This page contains information about the planning and development of the Division's budget for the upcoming fiscal year, including information about budget meetings, development timeline, and other resources you can use to learn more about our planning.

## Division Budget Meetings & Timeline

Note that due to the extraordinary circumstances brought on by the COVID-19 pandemic, budget planning for Fiscal Year 2020-21 continues this fall. Budget planning for Fiscal Year 2021-22 will take place in spring 2021.

- **September 17, 2020:** Division Budget Town Hall
- **October 8, 2020:** Campus Budget Town Hall (divisional updates to be provided)
- **October 2020 (dates will vary):** Unit staff meetings to discuss budget strategy with leadership
- **November 2020:** Division FY 20/21 budget finalized
- **December 2020 (date TBD):** Division meeting to include discussion of FY20/21 budget

## Division Budget Presentations & Materials

- [Division Budget Town Hall Presentation - September 17, 2020 \(/vpbfa/documents/division-meetings/bfa-budget-update-09-17-2020.pdf\)](#) (PDF (<https://get.adobe.com/reader/>), 646KB)

## Other Resources

- [Strategic Resource Planning Committee \(/strategic-resource-planning/index.htm\)](#)
- [CSUCI Budget and Planning Office \(/budget/index.htm\)](#)

# Divisional Budget Planning Timeline - FY 2020-21

Sep 4, 2020	President Beck's Budget Memo ( <i>SRPC website - Campus Budget Plan</i> )
Sep 11, 2020	Budget Town Hall #1
Oct 8, 2020	Budget Town Hall #2 ( <i>followed by SRPC Meeting</i> )
<b>Oct 12, 2020</b>	<b>Divisional Budget Web Pages Go Live</b>
Oct - Nov	Division/Unit Staff Meetings
Nov 12, 2020	SRPC Meeting – Present Proposed Budget Reduction Plans
Nov 19, 2020	SRPC Meeting – Develop Final Recommendation for Budget Reductions
Dec 4, 2020	Budget Town Hall #3 – Divisional Budget Reduction Plans

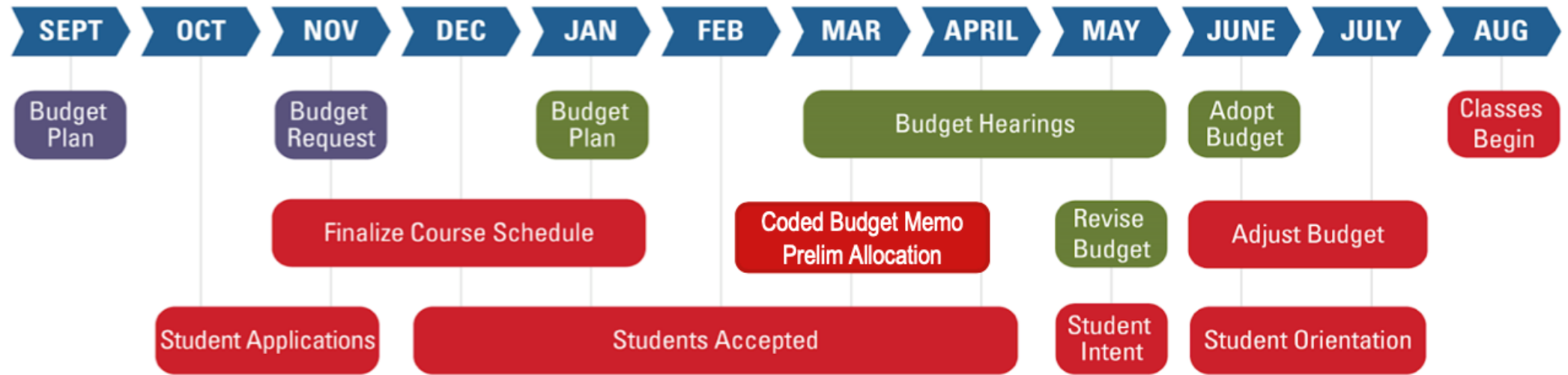
# Communications and Activities by Divisions

- Office of the President
  - OTP meetings (September 15 & 29), website to be launched
- Academic Affairs
  - Website to be launched; planning for DAA meetings underway (FY 21-22)
- Student Affairs
  - Website to be launched; all previous and upcoming DSA and area-specific meetings are listed
- University Advancement
  - Divisional Meeting (9/28); website to be launch (9/12), Executive Leadership and unit meetings
- Business and Financial Affairs
  - BFA Town Hall (9/17); website launched; unit meetings in progress

# Schedule of SRPC 2020/21 Planning Discussions

DATE	ACTIVITY
Oct 8	Budget Town Hall
Oct 8	SRPC Meeting #2 - <u>Preliminary Planning on Reductions</u> ; Communications Plan
Oct 22	SRPC Meeting #3 - Enrollment Modeling; <u>Continue Discussion on Reduction Planning</u>
Nov 12	SRPC Meeting #4 - <u>Continue Discussion on Reduction Planning</u> ; Divisional Reduction Plans Presented
Nov 19	SRPC #5 - <u>Reduction Planning Finalized</u> for Recommendation to President
Dec 4	SPRC #6 - Budget Town Hall on Reductions; Introduce budget planning for 2021/22

# BUDGET TIMELINE



■ STATE  
■ TRUSTEES  
■ CHANCELLOR/SYSTEM/CAMPUSES

*Formulate Planning Assumptions and Directives*

*Launch Budget Call*

*Divisional Budget Development*

*Budget Proposal Review, Comment, Recommendations*

*Budget Approval*

*President's Memo on Adjusted Budget*

**2020-21 Budget Planning**  
*Identify Permanent Budget Reductions*

**2021-22 Budget Planning**

**FY 2021-22 Budget Approval**

**President's Memo on Adjusted Budget**

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# Preliminary **FY 2021-22** Campus Budget Planning Timeline

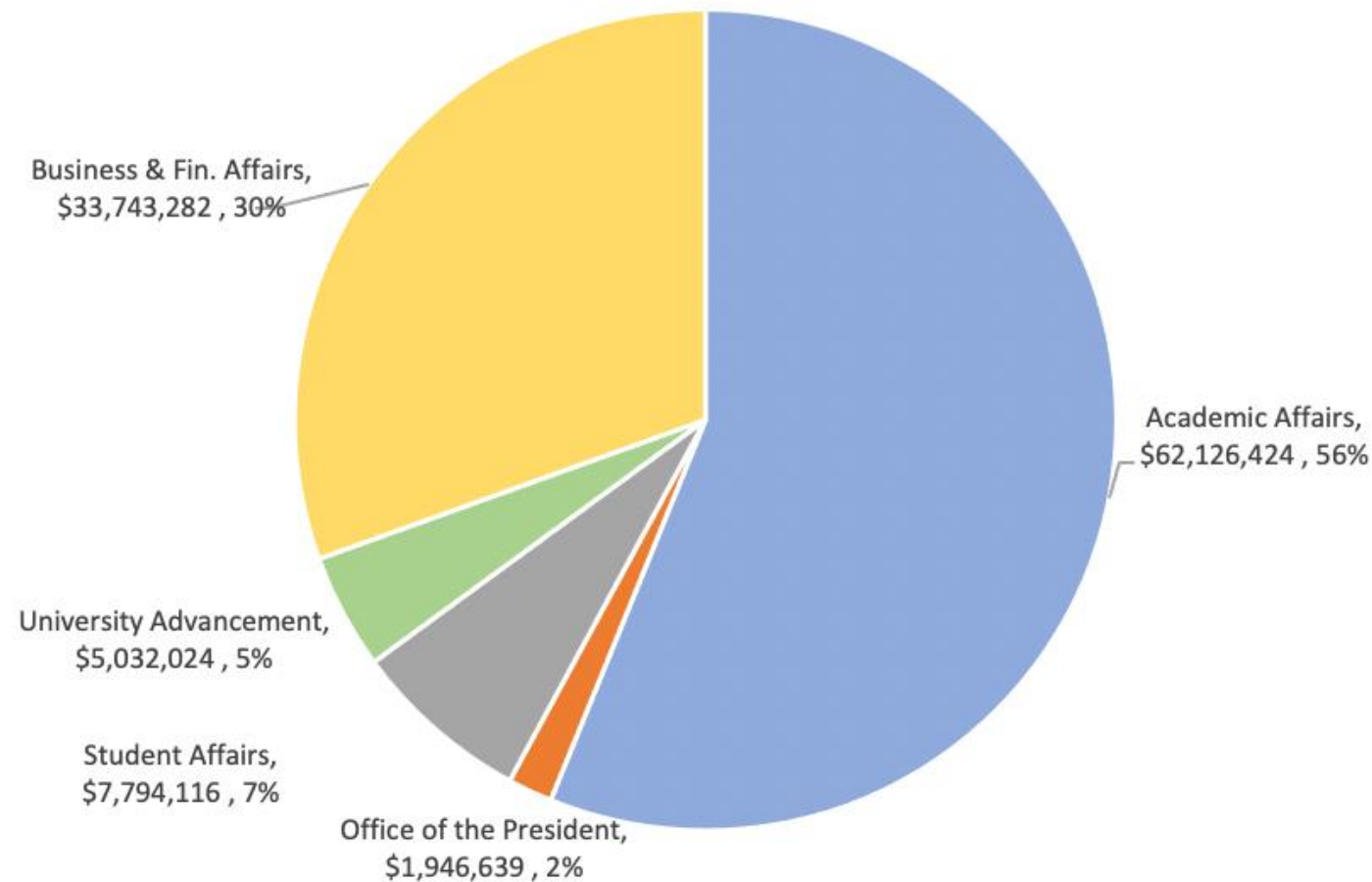
Mid-Jan 2021	Governor's January Budget
Jan - Feb	Budget Assumptions and Modeling
<b>Early Feb</b>	<b>SRPC Meeting - Spring #1</b>
Feb	FY 2021-22 Budget Planning Strategy
<b>Late Feb/Early March</b>	<b>SRPC Meeting - Spring #2</b>
Late Feb	Budget Town Hall
Feb - March	Divisional Meetings - Budget Updates
April	Divisional Budget Changes submitted to Budget & Planning
<b>April</b>	<b>SRPC Meeting - Spring #3</b>
<b>May</b>	<b>SRPC Meeting - Spring #4</b>
May	Budget Town Hall – Divisional Budget Plans

# **Preliminary Planning for 2020/21 Permanent Reductions**



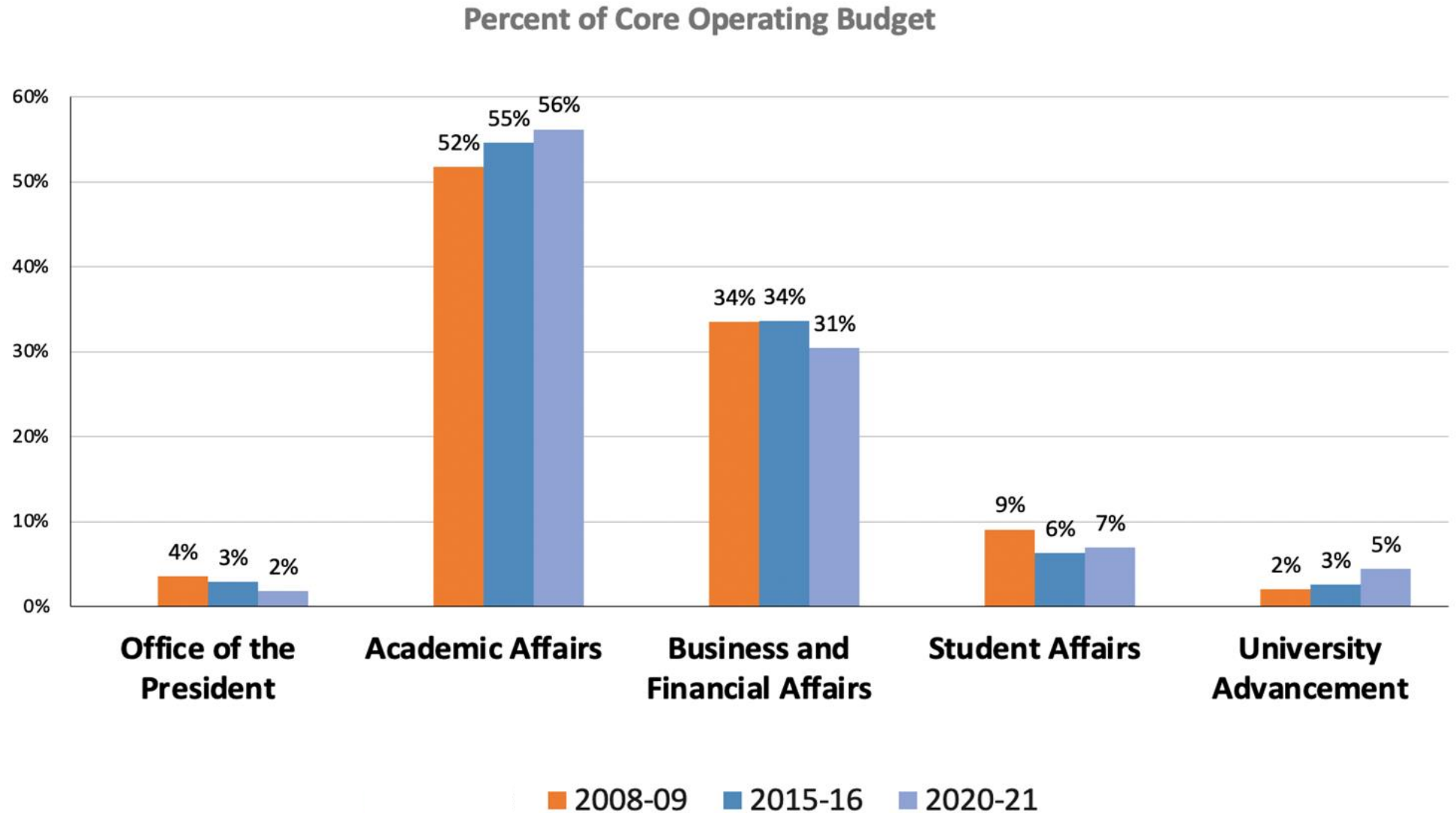
# Current Division Budgets

2020/21 Division Operating Budgets



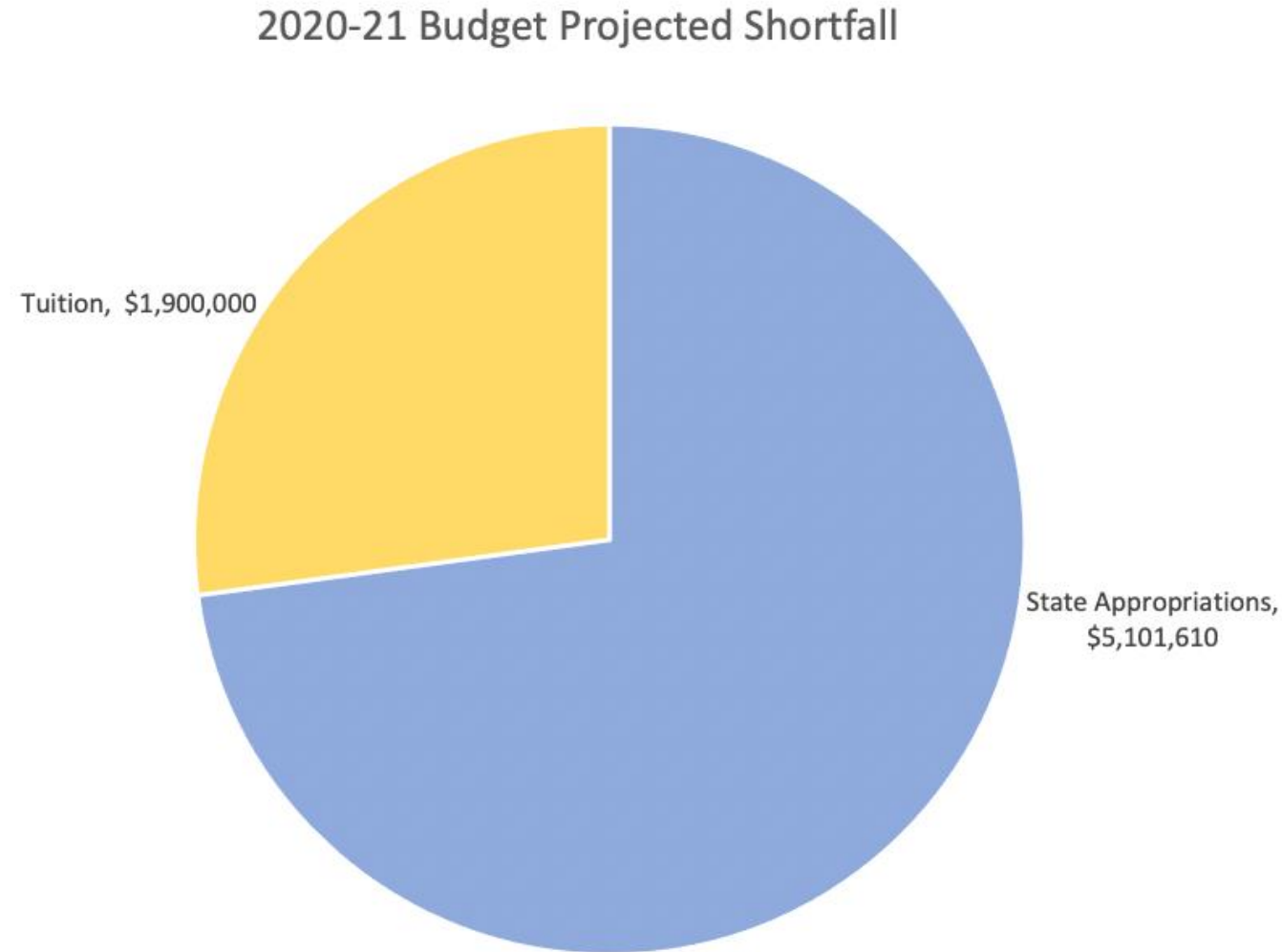
- Division General Fund core operating budgets by percent and dollar totals

# Division Budgets Change



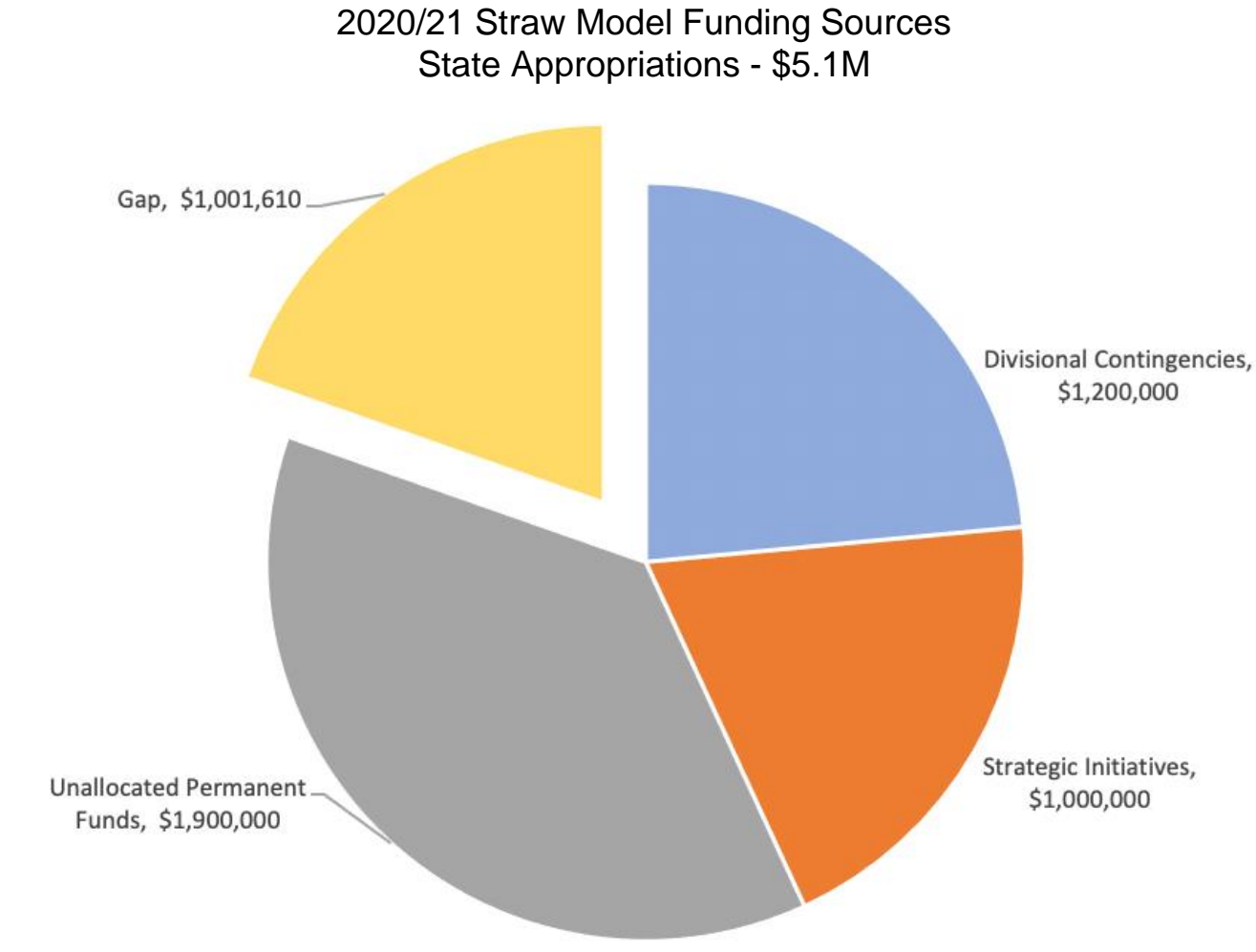
*Note: During the periods noted, organizational reporting units were realigned - notably, Info Technology to BFA, Career Services and Conf/Events to University Advancement; Academic Advising to Student Affairs, as examples.*

# 2020/21 Budget Projected Shortfall



- Campus to address permanent State Appropriations (blue) shortfall

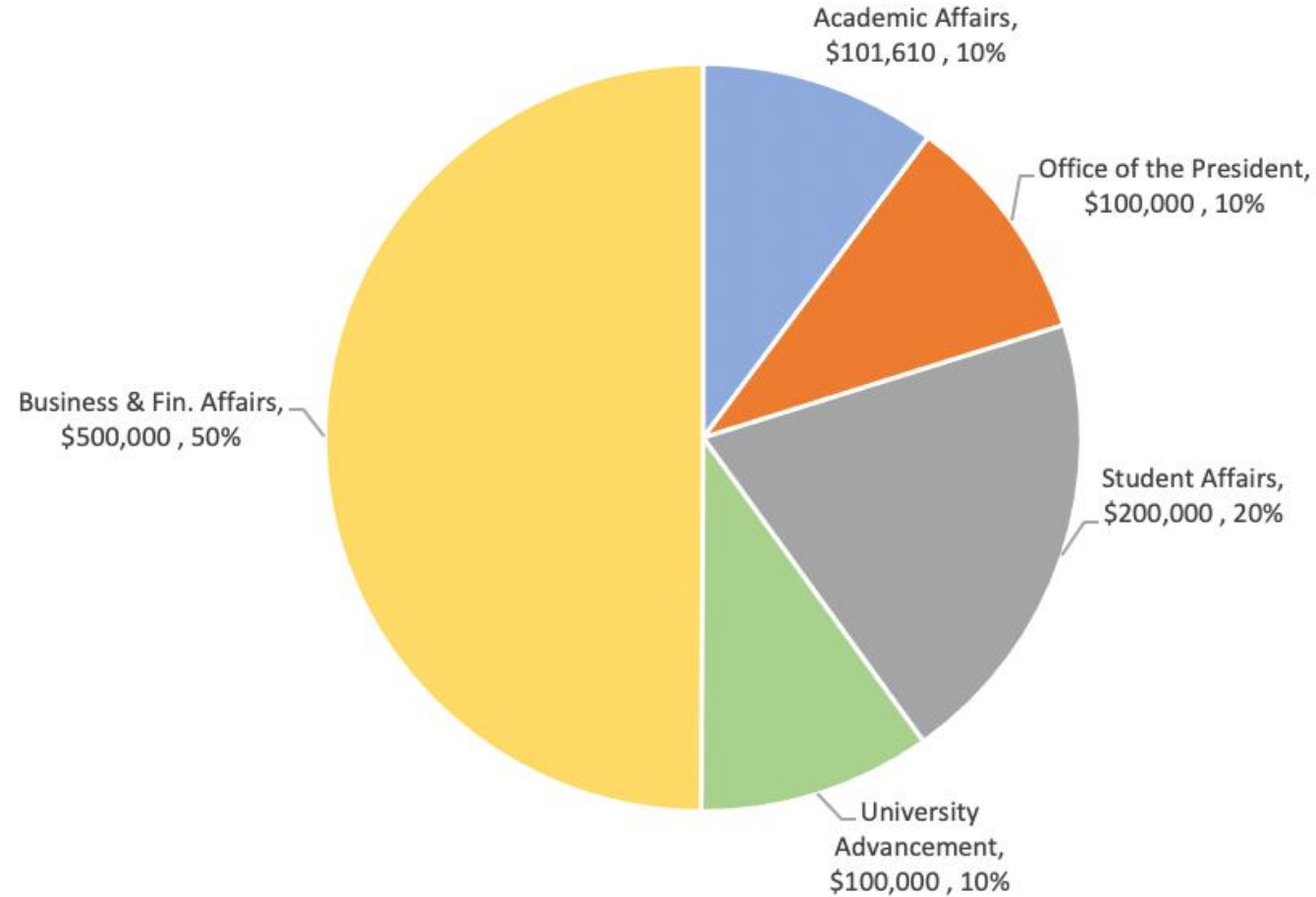
# Preliminary Proposal



- Resources identified centrally total \$4.1 million; gap of \$1 million to be addressed from divisional resources

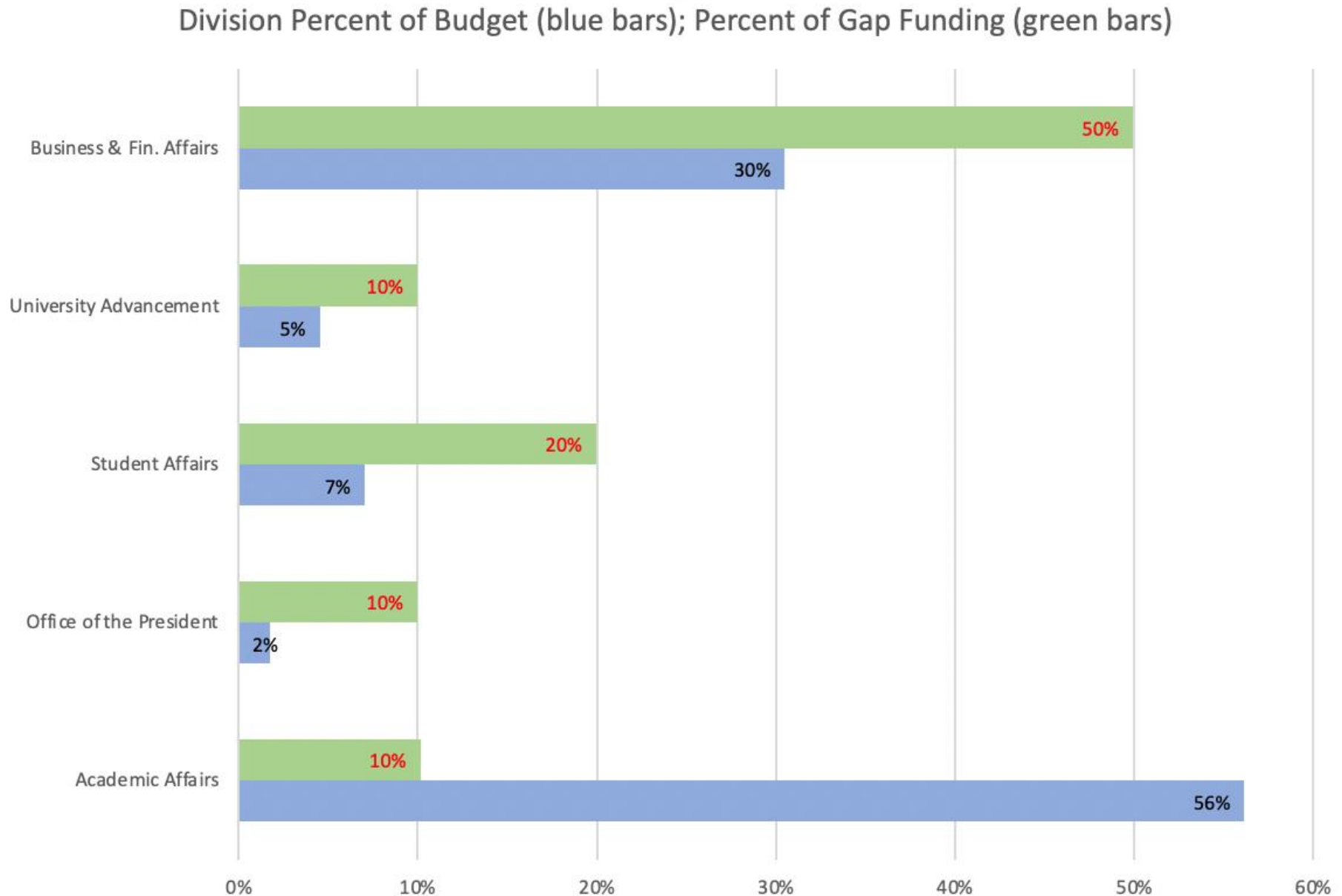
# Preliminary Plan for Gap Closure by Division

\$1.0 M - Straw Model for Gap Closure



- Proposed options for closing the gap by divisions

# Comparison of Divisional Budgets to Gap



# Next Meetings

Oct 22

SRPC Meeting #3 - Enrollment Modeling; Continue Discussion on Reduction Planning

Nov 12

SRPC Meeting #4 - Continue Discussion on Reduction Planning; Divisional Reduction Plans Presented

Nov 19

SRPC #5 - Reduction Planning Finalized for Recommendation to President

# 2020/21 Budget Reduction Planning

## Supporting Our University Strategic Initiatives

**Educational Excellence**  
**Student Success**  
**Inclusive Excellence**  
**Capacity and Sustainability**

**Thank You and Stay Well**