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.
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
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
Division Budget

Welcome to the budget webpage 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 FY 20/21 budget

Division Budget Presentations & Materials

- Division Budget Town Hall Presentation - September 17, 2020 (pdf) (PDF) (642 KB)

Other Resources

- Strategic Resource Planning Committee (/strategic-resource-planning/index.htm)
- CSU CI Budget and Planning Office (/budget/index.htm)
# Divisional Budget Planning Timeline - FY 2020-21

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>Sep 4, 2020</td>
<td>President Beck’s Budget Memo <em>(SRPC website - Campus Budget Plan)</em></td>
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<tr>
<td>Sep 11, 2020</td>
<td>Budget Town Hall #1</td>
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<tr>
<td>Oct 8, 2020</td>
<td>Budget Town Hall #2 <em>(followed by SRPC Meeting)</em></td>
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<td>Oct 12, 2020</td>
<td><strong>Divisional Budget Web Pages Go Live</strong></td>
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<td>Oct - Nov</td>
<td>Division/Unit Staff Meetings</td>
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<td>Nov 12, 2020</td>
<td>SRPC Meeting – Present Proposed Budget Reduction Plans</td>
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<td>Nov 19, 2020</td>
<td>SRPC Meeting – Develop Final Recommendation for Budget Reductions</td>
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<tr>
<td>Dec 4, 2020</td>
<td>Budget Town Hall #3 – Divisional Budget Reduction Plans</td>
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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
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<thead>
<tr>
<th>DATE</th>
<th>ACTIVITY</th>
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<tbody>
<tr>
<td>Oct 8</td>
<td>Budget Town Hall</td>
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<tr>
<td>Oct 8</td>
<td>SRPC Meeting #2 - Preliminary Planning on Reductions; Communications Plan</td>
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<tr>
<td>Oct 22</td>
<td>SRPC Meeting #3 - Enrollment Modeling; Continue Discussion on Reduction Planning</td>
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<tr>
<td>Nov 12</td>
<td>SRPC Meeting #4 - Continue Discussion on Reduction Planning; Divisional Reduction Plans Presented</td>
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<td>Nov 19</td>
<td>SRPC #5 - Reduction Planning Finalized for Recommendation to President</td>
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<tr>
<td>Dec 4</td>
<td>SPRC #6 - Budget Town Hall on Reductions; Introduce budget planning for 2021/22</td>
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<td>Date范围</td>
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<tr>
<td>Mid-Jan 2021</td>
<td>Governor’s January Budget</td>
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<td>Jan - Feb</td>
<td>Budget Assumptions and Modeling</td>
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<td>Early Feb</td>
<td>SRPC Meeting - Spring #1</td>
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<tr>
<td>Feb</td>
<td>FY 2021-22 Budget Planning Strategy</td>
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<tr>
<td>Late Feb/Early March</td>
<td>SRPC Meeting - Spring #2</td>
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<td>Late Feb</td>
<td>Budget Town Hall</td>
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<td>Feb - March</td>
<td>Divisional Meetings - Budget Updates</td>
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<tr>
<td>April</td>
<td>Divisional Budget Changes submitted to Budget &amp; Planning</td>
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<tr>
<td>April</td>
<td>SRPC Meeting - Spring #3</td>
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<tr>
<td>May</td>
<td>SRPC Meeting - Spring #4</td>
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<tr>
<td>May</td>
<td>Budget Town Hall – Divisional Budget Plans</td>
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Preliminary Planning for 2020/21
Permanent Reductions
Current Division Budgets

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

- **2020/21 Division Operating Budgets**

  - Business & Fin. Affairs, $33,743,282, 30%
  - Academic Affairs, $62,126,424, 56%
  - University Advancement, $5,032,024, 5%
  - Student Affairs, $7,794,116, 7%
  - Office of the President, $1,946,639, 2%
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.
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

Division Percent of Budget (blue bars); Percent of Gap Funding (green bars)

- **Business & Fin. Affairs**: Budget 30%, Gap Funding 50%
- **University Advancement**: Budget 5%, Gap Funding 10%
- **Student Affairs**: Budget 7%, Gap Funding 20%
- **Office of the President**: Budget 2%, Gap Funding 10%
- **Academic Affairs**: Budget 10%, Gap Funding 56%
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