MEMORANDUM

Date: May 10, 2024

To: Sylvia Alva, President, CSU Fullerton

From: Jidong Huang, Chair, Planning, Resource, and Budget Committee (PRBC)

Subject: PRBC Recommendations for FY 2023-2024

INTRODUCTION

I am pleased to submit for your consideration the recommendations from the Planning, Resource, and Budget Committee (PRBC) on budget priorities, process and planning improvement considerations, and ideas for strategic allocation of university resources for FY 2024 - 2025.

The recommendations presented below reflect the committee's collective discussions with a diverse group of campus constituents representing all divisions and many different roles. Recognizing the new 2024-29 university strategic plan was built upon an inclusive campus-wide development effort, there was also an effort within the committee to align our recommendations with the new university strategic plan.

I hope you find the committee's recommendations helpful as you work with the members of your cabinet on the finalization of the budget for the next academic year. Our recommendations are focused on critical operational needs and align well with the new university strategic plan. It was the unanimous opinion of the committee that recommended priorities should be thoroughly considered even if there are budget challenges in the next fiscal year.

STATEWIDE FISCAL YEAR 2024-25 BUDGET OUTLOOK

The state faces a shortfall in FY 2024-25. While the state's revenue outlook continues to evolve, weaker than expected revenues suggest that the state's budget problem will be greater by the time the Governor presents his May Revised Budget proposal.

In response to the state's fiscal challenges, the governor's initial January budget proposal calls for no new enhancements to CSU's budget, either base or one-time. Instead, the governor proposes to increase the CSU's ongoing base budget by $240.2 million, which is consistent with the terms of the multi-year compact agreement. However, the governor also proposes deferring funding this increase for one year, to fiscal year 2025-26. The proposal also assumes that the CSU continues to grow resident undergraduate enrollment by 1%. The governor's budget would, eventually, deliver to the CSU the same level of funding described by the compact. But by delaying funding to the following year, the state imposes additional risk to the CSU should the state's budget condition continue to degrade and the state becomes unable to fulfill its promise to fund the budget increase. In addition, the governor's proposal assumes that the CSU will temporarily self-fund the FY 2024-25 increase with internal, one-time resources.

Given this backdrop, the CSU has confirmed its commitment to funding the $240.2 million as a one-time increase until the ongoing General Fund is received in 2025-26. This unusual approach recognizes the tremendous uncertainty around the state's budget planning process for the coming

year and is an attempt to exercise the utmost fiscal prudence. CSU Fullerton's anticipated share of the increase is $18 million to cover mandatory cost increases and funded enrollment growth.

The CSU has long promoted the strategic importance of maintaining prudent fiscal reserves. The current state of the budget has made it necessary for the CSU to draw upon internal resources to weather the near-term uncertainty of the state's budget.

It becomes incumbent upon CSUF to continue to maintain a strong financial position as a hedge against budgetary risk and ensure undisrupted university operations.

BUDGET PRIORITIES

Over the academic year, the committee had thorough discussions with inputs from various stakeholders to determine our recommendations on the campus-wide budget priorities. Recognizing there are constantly more needs than the limited resources the university has, there was an effort in the committee to focus on actionable budget items that demonstrate pressing needs.

As a result, the committee decided to recommend budget priorities through two tiers: Tier 1 highest priority, and Tier 2 high priority items. We have noted where these recommendations bolster the elements of the University Strategic Plan (henceforth, "USP").

Highest Priority Recommendations

1. *Improve Admissions & Enrollment Management*

   A. Address urgent staffing needs at admission, registrar, and graduate studies office (USP Goal 1, Objective 1)

Admissions is a critical operational process for the University and we rank all of its operational components as the highest priority. These operational components include but are not limited to the University Registrar, Scheduling Office, and the Office of Admissions itself.

The Division of Student Affairs also noted that $2.3 Million was cut from the Division in 2020 while only $1.2 Million of that has since been restored, with a number of areas still operating with a structural deficit, including Admissions.

Though the Committee recognizes the importance of restoring funding in many areas, we view admissions as being singularly critical among these to the academic operations and primary function and missions of the University. We, therefore, strongly recommend that in this fiscal year, funding admissions (including all related units and activities) take priority over other Student Affairs functions.

The Office of Admissions and Student Affairs leadership noted that the introduction of new software (OnBase) is expected to drastically increase productivity of that unit. Without more thorough data, performance measures, or projections, it is difficult for the committee to evaluate the extent to which new staff and software will improve the performance. Nevertheless, it is clear that many units involved in the admissions process are understaffed and we support an increase in their resources in general.

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Additionally, the Division of Academic Affairs presented the case that active enrollment management can significantly improve the performance of other academic units and promote student success. We also strongly recommend investment in whatever systems, people, and processes will facilitate the effective implementation and use of enrollment management.

All told, we recommend thoughtful investment in enrollment management with a careful focus on accountability, and a review of the appropriate division to house various operations.

B. Implementation of the academic planner (USP Goal 1, Objective 3)

Furthermore, we feel positive about the university's initiative in implementing an academic planner that integrates seamlessly with the Titan Degree Audit (TDA) to monitor student progress from orientation to graduation. We encourage the campus planner program to be piloted at some departments to get user inputs and seek initial improvements before it is rolled out campus wide. *It is imperative that new software not have negative enrollment impacts on individual departments or colleges*, and there should be safeguards and fallbacks in place to help affected entities who are negatively impacted by predictable or unforeseen outcomes of new software.

2. ***Provide Support to Recruit, Develop and Retain High-quality and Diverse Faculty and Staff*** (USP Goal 3)

A. Faculty

Despite the importance of faculty to student success, both inside and outside of the classroom, many faculty see a campus-wide newfound emphasis on a narrow view of student success that has often bypassed faculty, and instead diverted attention and funds towards initiatives over which faculty, department chairs, and deans have no discretion. Instead there has been a profusion of hires in both upper administration, and non-instructional "student support staff." Without commenting on the value of these other investment areas, faculty support is at a critical low and should be addressed with urgency.

Specific ways in which CSUF support for faculty has eroded include:
- larger class sizes
- less instructional support in the form of ISA/GA (we note "supplemental instructors" contribute nothing to faculty workload and in many ways add to it)
- less RCSA support in the form of intramural grants
- increasing administrative burdens, including adding more training requirements and software, many of which seem arbitrary, and a lack of openness to streamlining these processes
- huge increases in enrollment, especially in some departments, without increases in FTF positions
- eliminating striving for excellence and achievement as a key part of the Strategic Plan

Faculty dissatisfaction is evident in:
- COACHE survey results, with "workload" and "lack of support for research/creative work" emerging as particular pain points
- unprecedented faculty support for the January 2024 strike
- high turnover, including untenured faculty choosing to leave during the probationary period

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- reduced presence of faculty on campus, with many choosing to work from home as much as possible
- low participation in commencement ceremonies and a reduced role for those who attend

These ongoing issues can be addressed with these specific recommendations (USP Goal 3). While all may not be possible to implement in a single academic year, we offer this list in the belief that it will be possible for campus policymakers to adopt several of these concrete actions as circumstances allow. At least some progress should be made on more than a few of these areas.

- Allocate more unrestricted funds to deans for them to support college-specific needs; this could be through a return to pre-2008 funding formulas based on stable SFR (student-faculty ratios). This will allow deans to better support college-specific instructional, RCSA, and equipment needs. Addressing SFR imbalances between colleges is an important component of this.
- Modify the criteria by which deans are evaluated, to soften hard measures such as "graduation rate," and include measures of faculty thriving, such as faculty turnover, faculty success in receiving campuswide recognitions and external funding; and instruments such as the COACHE survey. This should relax the pressure on deans to meet top-down benchmarks, and encourage them to be responsive to bottom-up initiatives and needs.
- Return supervision of college-IT support personnel, online instructional designers, and grant specialists to college control, with deans making decisions regarding hiring and allocation of funds.
- Explore shifting to a 9 WTU + 9 WTU teaching load campuswide (several colleges already follow this formula, and the Faculty Affairs Committee is working on a similar recommendation).
- Allocate more funds to support faculty research and creative activities (e.g., Jr/Sr). Remove the requirement that they can only be awarded in alternate years, and increase the dollar amount of awards which has not increased in 14 or more years. Fund more awards and at higher dollar amounts.
- Allocate more funds to support faculty innovation in teaching: the FEID funding rate this year was 50%, with many promising projects denied funding. For example, while all courses that are converting from face to face to asynchronous formats require additional faculty effort, only some are compensated. This creates an imbalance in faculty support and student experience.
- Allocate more funds to support faculty recruitment. The current amount of $5,000 per hire does not begin to cover the costs associated with publicizing open positions and bringing diverse and excellent candidates to campus.
- Allocate funds earned from enrolling Extended Education students to the department offering the classes in which those students are enrolled.
- Related to this, relax the new requirements for summer courses to meet minimum enrollment averages. This has stifled the development and continuation of summer programs that have historically had a positive impact on students.
- Increase sabbatical funding rates. If more sabbaticals are directed to faculty at the tenure stage, this should not come at the expense of sabbaticals for mid-career or senior faculty.
- Provide more funding to support graduate student recruitment, including fellowships and tuition waivers.
- Add a material award associated with campuswide high honors including the Carol Barnes, Don Shields, and Outstanding Professor awards. Currently these high honors are accompanied by only a round of applause and a piece of paper, which is insufficient. We recommend $8,000 to the faculty member, and $8,000 to their department.

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- Promote a more robust and visible pipeline of faculty into campus leadership positions. This would be in alignment with the new USP Vision Statement ("CSUF will serve as a … university that cultivates leaders who drive innovation …"); USP Value "Shared Governance"; and Objective 3.3 ("Support faculty and staff growth through strengthened professional development."). This could include more formalized mentorship opportunities between campus administrators and interested faculty, and success would be reflected in an increased presence of campus deans, vice presidents and presidents who have risen through the CSUF faculty ranks.

B. Staff

Many, and in our view most, CSUF Divisions have been plagued by high rates of staff turnover and difficulty in filling existing positions, which imperils the smooth functioning and mission of the university. In many cases, we lose staff and candidates not only to private industry, but also to sister institutions, particularly CSU Long Beach. This is largely driven by salary: remarkably, salaries at CSULB are higher than CSUF for almost all staff positions, despite the high costs of living in Orange County.

To address this, we propose 4 main remedies:
- Conduct a thorough analysis of staffing needs (internal) and staff salaries (compared to peer institutions), and map where our greatest deficiencies are in both these metrics.
- Develop a targeted plan for remedying these deficiencies.
- Impose a moratorium on creating new administrative (MPP) positions, and look for existing MPP positions that can be eliminated or consolidated. This will free up salary funds to better compensate staff.
- Explore the possibility of creating fully remote staff positions, to facilitate hires from lower cost-of-living areas.

C. Library

The current staffing in the Library is inadequate to meet the needs of students and faculty. Recent PPR recommendations show there is a need for a larger library budget to meet teaching and research needs that match the FTEs and population of the current campus, particularly one aspiring to achieve Research-2 status. Budget cuts not restored since 2008 and rising costs of academic resources make staffing decisions come at the expense of maintaining database subscriptions, which in turn, hurt student and faculty research.

3. ***Address deferred maintenance and increase facilities support*** (USP Goal 4, Objective 1)

Deferred maintenance (DM) continues to be a high priority need across the campus. The current DM needs far exceed the university's available resources. For 2024, the campus-wide DM estimate stands at $410M. Looking ahead, the campus-wide DM backlog estimate is projected to be $773M, factoring in both recurring and non-recurring expenses through 2033.

The state and/or the Chancellor's office has not provided consistent funding for addressing this issue. In most cases, one-time funds were used to address the deferred maintenance issues. To compound the issue, the longer a deferred maintenance issue exists or is not addressed, the more expensive and complex it will become. Therefore, PRBC continues to recommend the provision of sufficient funds from the university budget to cover deferred maintenance needs

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across the campus. Specifically, there are pressing project needs that require immediate attention:

- HVAC-Related Projects totaling $57M (25 Elevator Refurbishments: $25M of which $10M is necessary to replace 10 elevators with the highest incidence of entrapments)
- Campus-wide ADA Upgrades totaling $25M
- 12 Roofing Projects; total of $17M of which $10M is required to address the replacement of 6 roofs prone to leaking during heavy rainfall
- Campus-wide Facilities Related Emergency Response totaling $10M
- Replacement of 150 antiquated fume hoods in Dan Black Hall and McCarthy Hall totaling $10M
- Replacement of a failing sewer system in Education Classrooms totaling $9M

We recommend the university to create a comprehensive schedule or multi-year plan for addressing deferred maintenance, especially those urgent facilities project needs identified here. We also recommend the university continue to explore grant/award opportunities and resources at the federal and state level to help address this issue.

High Priority Recommendations

4. ***Strengthen student advising support at the college and/or department level*** (USP Goal 1, Objective 3).

Advisors help students navigate through their academic journey by providing students very needed guidance on appropriate courses to take, and develop an academic plan that aligns with a student's interests and academic goals. Having adequate advising support at the college and department level is essential for ensuring student success.

The PRBC noted that some colleges primarily rely on the use of professional academic advisors, while some other colleges rely more on the faculty advisors to serve student advising needs.

We also noted adequate student advising support is an ongoing issue in multiple colleges and nobody understands the curricula more than faculty who are key in ensuring student retention and graduation. We recommend each college to conduct a need analysis to determine if student advising support at their respective college and departments is sufficient or not. Accordingly, we encourage campus-level planning and support for either providing more assigned time to faculty advisors or hiring additional professional advisors in the colleges that have demonstrated ongoing need for additional student advising support.

5. ***Provide Support for IT Critical Needs*** (USP Goal 1, Objective 1; USP Goal 5, Objective 3)

In last year's memo, PRBC recommended a strategic approach for establishing online programming that incorporates student demand and pedagogical appropriateness given that online programming provides students higher accessibility and flexibility while having the potential of being cost effective. To support this recommendation, it's important for IT to have additional support, i.e., three additional instructional designers for supporting the increasing need of online course design and implementation across campus. Within this rubric, we note that in some colleges instructional designers are under-utilized, and we therefore recommend that these colleges are allowed to redirect their resources in areas of need identified by faculty.

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Another critical need at IT is the support for addressing information security. As a reliable IT infrastructure is the backbone for the many daily operations at the university, it is important for the university to have appropriate IT resources for protecting sensitive data and preventing potential data breaches and/or cyber intrusions. The Information Security unit at IT has been recently re-organized but continues to be short on baseline staff (i.e., two information security analysts).

PROCESS AND PLANNING IMPROVEMENTS

Beyond resource allocation issues, the PRBC notes that the day-to-day operations of the university present a number of challenges that add obstacles to those working on the substance of the university mission. Attention to the nuts-and-bolts of daily operation is, in the view of the PRBC, an unexciting but crucial area that must be addressed for the campus to be able to attain its central goals. This is listed separately from the two priority tiers, but a strong feeling from the PRBC is that these issues are *central* to addressing the core challenges the campus faces.

1. ***Innovate and Improve Campus Operations*** (USP Goal 5, Objective 3).

The PRBC observes that, at present, there are meaningful challenges in how technology is impacting campus operations.

    A. Software

In particular, it is evident to the committee that the Concur software, and its centrality in p-card and travel processing, is a substantial bottleneck that is creating frustration and consuming undue amounts of staff time. We acknowledge with appreciation that the Administration and Finance division has recognized that there were problems with the rollout and implementation of the system. We are concerned that the difficulties are significant enough that meaningful solutions must involve more than better training. We note the efforts of a task force led by Marie Johnson, and a separate PRBC group led by Jon Bruschke, where each developed a list of problems from an end-user perspective. The PRBC group shared their findings with and then yielded to the Johnson group. Yet, it is unclear whether all items on the list are being addressed and we are skeptical that a list of problems to be fixed is an adequate response. It is unclear if Administration and Finance is now maintaining a centralized list of problems and has a concrete plan to address them.

As recently as the late spring there remains considerable staff frustration. With due respect, we strongly recommend a thorough re-examination of the viability of Concur and feel it essential that by the fall of 2024 streamlined processes are in place, be they new software or considerable simplification of the Concur processes.

We emphasize that the Concur software is taking a real and immediate toll on the ability of the campus to process its necessary business, and our ability to succeed in our core mission is lower in the Spring of 2024 compared to the Spring of 2023 due to the ongoing issues with Concur. We note that end result measures (such as the number of travel requests that are processed in a certain number of days) do not capture the additional staff workload that is evident to the PRBC. Minor changes to the software may not be sufficient to return to the campus operations to their previous state of efficiency.

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B. Cumulative Difficulty

Compared to the Spring of 2023, users in the spring of 2024 had to navigate a large number of new systems, namely (1) CONCUR for travel, procurement, and p-card reconciliation, (2) CHRS for personnel issues, and (3) new CSFPF processing with ServiceNow. In addition, all Instructionally Related Activities funds are now administered by Administration and Finance rather than ASI, and there do not appear to be a set of written guidelines that govern the unique needs of those programs. Finally, there are plans to roll out new scheduling software. Almost all of the work of the ASCs, therefore, has been turned over to a new system or new software within a very short period of time. This has produced substantive pressures on staff that go beyond what can be addressed by training alone. We encourage careful consideration of the collective impact of changing so many systems so quickly, and a redoubling of efforts to address staffing shortages.

Put bluntly, changing over five software systems in one year's time has had significant and concrete negative impacts on the staff, and immediate and concrete actions (beyond training) are necessary to address them.

The concerns are two fold. First, it is not evident to end users that even if the new systems were fully implemented, and all necessary users were trained, and all bugs had been removed, that the new system offers any tangible improvement over the previous ones. Second, even if modest improvements are obtained, making so many changes to so many systems in such a short period of time is creating undue stress on staff.

An ongoing concern with the Adobe Experience Management (AEM) software is the inability of users in the cue to identify what level a given request is at. If, for example, a student has submitted a withdrawal request but it has not been processed, a department chair has no ability to find out whether the bottleneck is at the instructor level, the Dean level, or somewhere else in the chain. Tracking the forms down requires special requests of higher-level information technology people. The result is that an inordinate amount of time is invested just to track down the form. This is a known issue that has been the subject of committee inquiry for several years; it is simply not a function the software maintains. Confronting and overcoming issues just like this – where there is a clear problem inherent to the software that is derailing staff time – is the sort of halcyon issue that *must* be addressed for strategic plan Goal 5 to have credibility.

A related issue is that the systems do not appear to be meaningfully integrated, and OBIEE updates are slow enough that at the academic department level budgeting appears to be a largely offline practice. We strongly endorse cross-division collaborations and resource sharing (USP Goal 5, Objective 2).

2. *Identify and Implement Best Practices in Budgeting Processes to Improve Efficiency and Transparency* (USP Goal 5, Objective 1).

Budgeting reports that give more detail on administrative salaries and expenses are especially important to campus morale. Disaggregating "salary" costs to relevant unit levels, for instance, would greatly inform strategic budget decisions. Campus budget reporting at present, for example, identified a total Academic Affairs budget but does not identify its growth or decline relative to other divisions or the number of students, does not identify how lecturer employment and assignment plan a role in the budget, and does not show growth in administrative salaries compared to staff or faculty. Even changes over time are difficult to track.

It is obvious to the PRBC that lecturer employment is central to the management of the Academic Affairs budget, but is largely invisible in current reporting. We recommend Administration and Finance work carefully with the PRBC to develop budget reports that allow the PRBC to meaningfully engage in priority setting including areas for savings instead of simply identifying areas of need. We are not critical of Administration and Finance here; we simply wish to work with them to make the work of the PRBC more meaningful.

3. ***Improve Campus Resilience Towards Inflation and Financial Stability*** (USP Goal 4, Objective 2).

Though financial stability and independence have been identified as a high priority objective, units responsible for implementing them have not been assigned. The committee, therefore, recommends that this first organizational step be taken immediately. This could be accomplished, in part, by a task force appointed by the Academic Senate or cross-divisional working group.

There are some concrete steps in one area that some units may be able to undertake now as well. As noted elsewhere in this document, deferred maintenance is chronically underfunded and a high priority item. Other institutions, like local governments, typically employ grants administrators and related staff to secure federal and state grants to construction, improvement, and maintenance of infrastructure, facilities, and equipment. The Division of Administration and Finance should consider hiring a grants administrator with proven experience securing state and federal grants for these kinds of projects.

Related to the above, the Division of Administration and Finance should form a working group with University Advancement to secure donor funding for naming existing facilities and spaces that would enable repair and maintenance of existing facilities. A key concern is that the success of current Advancement efforts does not appear to be directing appropriate resources at areas of need.

The university should look to complement its resources with those of overlapping local governments. Local governments have a very different set of powers and financing mechanisms available to them than universities. Though "town-gown" relationships in some places can be fraught, we believe that there is great potential for a closer relationship between the University and our local governments (the City of Fullerton and Orange County) in order to take advantage of our complementary attributes. We, therefore, recommend that the University investigate whether a strategic partnership with the City of Fullerton and/or Orange County may provide opportunities for infrastructure projects that benefit both the University and the City.

4. ***Improve Job Stability for Part-time Faculty*** (USP Goal 3, Objective 3)

The committee highly recommends that the campus review the lecturer appointment processes to promote career advancement. A past PRBC report completed by Laleh Graylee discovered that hiring fewer lecturers with higher entitlements could save a seven-figures cost in benefits. This data was confirmed by 2023-4 Chair Bruschke, which underscores that lecturer stability advances the goal of faculty retention and enhances a sense of belonging among lecturing faculty. This cost savings would largely self-fund lecturer advancement, extend security for lecturers, and advance the social justice goals of the campus. Providing stable and continuous employment incentivizes high-quality teaching, capitalizes on instructor experience, advances the University

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goal of equity-minded practices that can address marginalization due to class and rank, and supports the retention goals of the USP Goal 3, Objectives 2 and 3. Developing a consistent policy with a tracking process, deadlines, and a value placed on lecturer career advancement would be efficient, improve the quality of the student experience, and better align campus practice with its values. Transparent budgeting processes would need to track the reallocation of benefits savings to the Division that generates the resources. Additional details are provided in the attached Lecturer Stability White Paper, maintained in the PRBC folder. While chair training is useful, it represents only a small portion of what needs to be done.

This recommendation has been made in previous years and, we believe, the time has come to put the proposal into action. There are important details to work out, including tracking of funds, and making sure that the cost savings are used (at least in part) to incentivize department decision-making.

5. ***Build an Infrastructure of Support for all Students*** (USP Goal 2, Objective 1).

The Division of Student Affairs noted that all of their subunits, including Title IX and DSS, were operating under structural deficits imposed by significant cuts in prior fiscal years. The campus has only a single confidential advocate for all sexual harassment and assault issues that might arise.

DSS is currently funded out of stateside money, however, it has a responsibility to serve all students, including those who are taking courses through Extension. We, therefore, recommend that Student Affairs engage in cost allocation of DSS by billing Extension for its proportionate share of students who use DSS, especially in summer and winter sessions. Other divisions and units may consider this cost allocation approach for students taking courses through Extension.

The deans from multiple colleges noted that support for graduate and international students was inconsistent and unequal to the support that undergraduate and domestic students routinely get. We, therefore, recommend that all student support services within all divisions be extended to all students equally. One specific item that can be remedied is the counting of graduate students. Graduate students are supposed to be counted at 1.25 FTES relative to undergraduate students, but this is not applied consistently throughout the institution.

CONCLUSION

Observing the university's overall financial health, and recent positive trends at both the campus and the system-wide level, the PRBC believes it is now a crucial time to establish budget priorities to address ongoing operational needs and improve processes and planning that align well with the new university strategic plan. While there is always a challenge in available resources, we feel positive strategic allocation of campus resources focusing on critical budget priorities would create meaningful progress towards our campus goals and contribute well to the success of our faculty, staff and students.