- Agenda – VP Dalton
- Welcome – President Qayoumi
- Overview of Cal State East Bay’s DRAFT Enrollment and Budget Plan – VP Dalton and AVP’s Hébert, Ormsby, Perry, and Smith
- Summary of Implications for PEMSA – VP Dalton
- Discussion, Questions, Suggestions – PEMSA staff
- Concluding Remarks – President Qayoumi
Cal State East Bay and CSU Budget History, 2007-present

- July 2007 – three-year enrollment growth plan to clear CSUEB structural base budget deficit of $4.2m
- Fall 2008 – CSU budget reductions eliminated potential of enrollment growth funding for next several years
- Summer 2009 – further CSU budget reductions led to furloughs
- 2010-11 – end of furloughs; mandated reduction in enrollment targets
Schedule for 2010-11 Budget and Enrollment Plan

- December 2009 – draft division plans to President
- January 2010
  - Preview of Academic Affairs draft plan by ExCom
  - Synthesis of division drafts for University review following UPABC on January 21
- January 28-February 5, 2010 – division and college budget and enrollment forums
- February 15, 2010 – final plan due to Chancellor’s Office

For full DRAFT plan, see Strategic Planning website:
Cal State East Bay Budget Strategy

Multiyear approach

Strategic analysis based on
- Seven mandates from town hall meetings, February 2007
- Academic Plan, February 2008
- Strategic Planning Summary and Priorities for Implementation, April 2008
Implications of Strategic Approach

- Reductions based on protecting core functions with operating budget, starting with instruction
- Reductions based on analysis of long-term commitments and directions, not “quick fixes”
- Recovery, when it comes, based on same priorities
- Substitution of alternative revenue sources where appropriate and feasible
Strategic Principles, November 2008

- Enrollment momentum
- No “across the board” actions or percentages
- Savings in one unit not transferred as costs to another
- Do things differently to reduce costs while protecting service and/or quality
- Change scope or “level of service” of activities; explicitly reduce, extend, postpone, or stretch out procurements and projects
Cal State East Bay Enrollment Targets

- California Residents
  - 2008-09
    Exceeded CA Resident Target by 640 FTES
    (150 covered by one-time funds)
  - 2009-10
    Managing toward 11,764 CA Resident Target
  - 2010-11
    Reduce to new 10,647 CA Resident Target
    (Reduction of 9.5 percent)

- Non-Residents, Domestic and International
  (revenues assumed in budget allocation to Cal State East Bay)
Enrollment Management Approach for 2009-10

- Earlier, firm deadlines
- Fewer special admits
- Reduced Unclassified Post-Baccalaureate students (goal: to zero)
- Proposal for “high unit” seniors
- Limited Winter/Spring applications
- SIR fee to better forecast show rate (for 2010-11)
Enrollment Management Additions for Reduced 2010-11 Target

- Reduce summer under state support
- Limit admission
  - Undergraduate majors ("impacted")
  - Selected graduate programs
- Emphasize progress to degree
  - Remedial and upper division writing courses
  - Earlier declaration of major
  - "High unit" seniors
  - Maximum units per student during registration
  - Satisfactory academic progress
- Use Self-Support per EO 802
Cal State East Bay – University Base Budget

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Base Budget</th>
<th>Change</th>
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</thead>
<tbody>
<tr>
<td>2007/08</td>
<td>$142.2 million</td>
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<tr>
<td>2008/09</td>
<td>$155.0</td>
<td>9.0%</td>
</tr>
<tr>
<td>2009/10</td>
<td>$137.6</td>
<td>-11.2%</td>
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<tr>
<td>2009/10*</td>
<td>$137.8</td>
<td>0.2%</td>
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<tr>
<td>2010/11**</td>
<td>$134.7</td>
<td>-2.3%</td>
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<tr>
<td>Net change 08/09 to 10/11</td>
<td>$ -20.3</td>
<td>-14.3%</td>
</tr>
</tbody>
</table>

* Includes reorganization of Student Affairs units and furloughs
** Includes mandated 9.5% reduction in enrollment target
### Planning, Enrollment Management, and Student Affairs – Base Budget Summary

<table>
<thead>
<tr>
<th></th>
<th>2007/08 (July 1)</th>
<th>2008/09 (July 1)</th>
<th>2009/10 (July 1)</th>
<th>2009/10 ** (July 1, adj)</th>
<th>2010/11 *** (July 1)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PEMSA Base Budget (Operating Budget)</strong>*</td>
<td></td>
<td></td>
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<tr>
<td>Initial Base for PEM</td>
<td>$6,969,380</td>
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<td>Adjustments</td>
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<td>$33,708</td>
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<td>Next Base for PEM</td>
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<td>$7,003,088</td>
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<td>Reductions</td>
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<td>-$1,165,528</td>
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<tr>
<td>Final Base for PEM</td>
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<td>$5,837,560</td>
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<tr>
<td>Student Affairs and Other Adjustments (Net)</td>
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<td>$652,226</td>
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<tr>
<td>New Base for PEMSA **</td>
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<td></td>
<td><strong>$6,489,786</strong></td>
<td><strong>$6,489,786</strong></td>
</tr>
</tbody>
</table>

- **12-Month Salaries (Dec. 2009 Payroll)**
  - $6,088,588
- **Furlough Savings (estimate) ******
  - -$557,516
- **Salary Balance**
  - $5,531,072
- **OE&E (estimate) *******
  - $1,200,000

- **FTE Management and Staff Positions**
  - At "Full Strength" (PEM plus SA)
    - 122.5
    - 131.5
  - Dec. 2009 Payroll
    - 118.0
Planning, Enrollment Management, and Student Affairs – Base Budget Summary: Explanatory Notes

* ASI and trust funds are not part of the Cal State East Bay (or PEMSA) operating budget.
** Adjusted allocation for 2009-10 reflects subsequent staff reassignments and proportionate OE&E to PEMSA.
*** Base budget for 2010-11 includes a mandated enrollment reduction of 9.5 percent.
**** Estimated furlough savings based on salaries for all currently filled positions on December 2009 payroll.
The largest components of OE&E for PEMSA include contracts (e.g., specialized administrative software licenses), publications and other media, events, office equipment and supplies (including photocopying) to support staff, and recruitment travel.

Direct comparisons are difficult with the reorganization that joined PEM and some Student Affairs functions. However, one indication of the reduction in OE&E can be shown by comparing the prior PEM OE&E expenditure of about $1.2 million in 2007-08 with the approximate allocation of $800,000 for the PEM portion of PEMSA in 2010-11. This is a reduction of about one-third. Put another way, OE&E has dropped from over 17 percent of the PEM budget to less than 15 percent of the PEMSA budget.
PEMSA Budget Reduction Principles

- Focus on PEMSA’s mission, vision, and values
- Meet student access and success needs (PEMSA’s key strategic mandate)
- Support enrollment reduction plan
- Consider longer-term implications
- Implement online service delivery
- Sustain critical mass for core PEMSA functions
- Realign activities among functional areas and across annual and quarterly cycles
PEMSA Operational Implications

- Scale back publications and events
- Implement online orientation
- Substitute self-service, online services
- Limit individualized data analysis
- Enforce deadlines
- Apply more restrictive admission criteria
- Encourage more efficient scheduling
- Reduce OE&E in general
PEMSA Staffing Implications

During 2009-10
- Restrict overtime
- Reduce temporary staff
- Reduce student assistants
- Keep vacant positions open

For 2010-11
- Reduce staffing levels further
Discussion
Questions
Suggestions

Linda.Dalton@csueastbay.edu or http://www20.csueastbay.edu/pemsa/forms/comments.html

For full DRAFT plan, see Strategic Planning website: http://www20.csueastbay.edu/about/strategic-planning/budget-and-enrollment-plan-for-2010-2011.html
Questions and Suggestions Before Forum

- How will staff reductions affect a department’s ability to get their work done?
- Look at return-on-investment (or return-on-event) for specific outreach and recruitment efforts and locations
- Substitute work study for regular student assistants
- Analyze work flow and provide cross-training
- More black-and-white, less color copying and printing
Questions and Suggestions Before Forum (cont.)

- Allow remaining staff to volunteer to be moved or transferred to any more urgent position of similar level – that is, revisit which staff positions are most needed on campus.
- Could be an opportunity for staff to do something different, esp. those with additional skills, education and experience not being used in their current job.
- Consider waiving probation for these changes which would occur as internal recruitments.
Comments at Forum

- Continue furlough plan?
- Appreciate principles and process, including these:
  - Not across the board
  - Quality
  - Long-term implications
  - Employee expertise in position and how to make adjustments
- University – reward quality and contributions
- Automation of reporting functions
- Cross training
- Self-service online for other university functions
Bottom line – what else are we doing / do we need to do? – in dollars other than salaries
Managers should ask staff for their ideas on how they can get their work done better
Appreciation for good work – not just monetary
Would like opportunity to reduce hours
Quarter system means we do everything 4 times a year – consider conversion to semester
Comments at Forum (slide 3)

- Look seriously at registration processes and procedures – 12X/year – registration, drops for non-payment, etc. – automate, change
- Teach students to take more responsibility for themselves and following deadlines, meeting requirements, etc. – otherwise self-service won’t save time and money
- Hard for prospective students to be clear on what documents have been received
- How to reduce fixed expenses – e.g., utilities
- Reliance on self-service – can we do it?
Comments at Forum (slide 4)

- Effects of ITS reduction on self-service
- Self-service – find a way to help students use it effectively, so they don’t fail; need to be more student-friendly
- Students just don’t check their MyCSUEB – how to urge them to do so
- Who implements the cross-training and how soon?
Comments at Forum (slide 5)

- ASI touched, too – 9.5% enrollment reduction means less revenue; looking at shifting more toward direct student service
- ASI sensitive about Rec Wellness Center – previously approved by students, paid by student fees, and already underway
More Comments

- Volume and length of telephone calls affected by the following:
  - How can we teach students to use self-service – online tutorial?
  - Older students more resistant to self-service
  - Increasing calls from parents, esp. of freshmen, who aren’t familiar that FERPA protects student information
More Comments (slide 2)

- Could ASI help with self-service training?
- Past accommodate of students now making it harder to ask them to be self-sufficient
- Consider using admit term as default for catalog to reduce confusion by student, various advisers, which would streamline processing
- How many additional positions will PEMSA lose if we can’t find other ways to reduce or cover costs?
More Comments (slide 3)

- Self-service resources:
  - ADOBE Captivate at UCSB
  - CSU Fresno financial aid tutorials
- Students who don’t monitor their Horizon email cause staff frustration because they don’t take care of their administrative business through Student Center
  - Consider requiring electronic tutorial before matriculation
  - Consider Facebook or Youtube video tutorial