

CALIFORNIA STATE UNIVERSITY, LONG BEACH
2002-03 RESOURCE PLANNING PROCESS
General Conclusions, Recommendations, and Guidelines

Campus Planning: Mid-Range Goals

CSULB Mid-Range Goals identify campus priorities -- consistent with the existing campus mission -- to be given special consideration for resources and attention within a three-year planning perspective. In addition to the Mid-Range Goals, each University division has and will continue to have more specific objectives and activities. Mid-Range Goals provide the framework for all-university budgeting by guiding each of the divisions in preparing proposals and guiding RPP in recommending allocations of funds.

Goals for 2002-2005 assign top priority to maintaining quality of instruction and services in the event of significant budgetary reduction. RPP discussed this priority and recommends to the President that funding for the 2002-03 schedule of classes be the top campus priority to ensure that students are able to make orderly progress toward degree. For purposes of planning the schedule of classes, RPP recommends that the Division of Academic Affairs assume funding for the already-determined campus enrollment target at the customary marginal cost rate.

While an extreme fiscal exigency conceivably could affect the absolute level of funding the campus is able to commit to this priority, the campus consensus to support the necessary schedule of classes is very strong.

In addition to this top priority, seven planning areas have been identified of all-university concern:

1. Quality of Programs and Services
2. Resource Management
3. Enrollment Management
4. Year Round Operation
5. Quality of the Physical Environment
6. Information Technology
7. Non-State Revenue

If the campus experiences a significant budget reduction in 2002-03 and/or 2003-04, progress toward our Mid-Range Goals will likely be delayed. However, not all goals require new funds and some are already the focus of existing activities. Therefore, progress toward these goals will be able to continue. Goals for each planning area are described in the Mid-Range Goals document available at the Strategic Planning web site www.csulb.edu/web/projects/planning/.

The University measures progress towards attainment of Mid-Range Goals. The report on progress toward prior years' goals and other campus planning information are also available at the Strategic Planning web site.

Enrollment

For the college year 2002-03 (which includes the summer term 2002), the campus enrollment target has been set at 26,440 FTES. This enrollment target represents a 5.2% increase over the funded target for 2001-02, but it remains below our actual enrollment in the current year.

The academic year target for 2002-03 is 24,835 FTES, an increase of 835 FTES. Because of the large number of continuing students and new transfer students, the campus will probably exceed that number by as much as 1,100 FTES, the same amount by which it exceeded its target this year. The campus has designated 460 FTES of the total enrollment increase for the summer 2002, which will bring the enrollment level equal to that generated in summer 2001, or 1,605 FTES.

The freshman class has been officially designated as an impacted category, enabling the campus to utilize higher admission standards, beginning with the applicants for fall 2002. The goal of the campus' impaction plan is to reduce the size of the freshman class from 4,517 enrolled in fall 2001 to approximately 3,300, roughly the size of the two previous freshman cohorts. Even that number will result in sustained, albeit slower, growth for years to come.

During the next year, the campus will extend its enrollment management efforts to upper division transfer students by further shortening the application period, requiring applicants to indicate their intended major, expanding the list of impacted majors, and requiring that students denied admission to impacted programs select an alternative major or enroll at another campus.

In all of these efforts to control enrollment to be commensurate to funding and capital, the University remains fully committed to preserving diversity.

Planning in a No-Growth Era

For most of its history, CSULB has been growing and enrollment funds have been allocated to support growth and innovation of new programs. Now, the University is planning to manage enrollment in order to stabilize its size. With the Fall 2002 freshman class, the campus is officially impacted and is implementing the first steps in the campus enrollment management plan. When enrollment stabilizes, the campus will have limited access to new enrollment growth funding. California's fiscal crisis greatly accelerates our entry into a period of limited new funding. Even when the crisis abates, the campus is likely to have few new resources because of our planned enrollment stability.

Thus, the campus is entering into a new period in its history. Despite the loss of new enrollment growth funding, our need to continue to plan effectively and to innovate creatively will not diminish. In order to do so, it will be necessary for the campus to modify how planning and implementation of new projects are carried out.

New programs and activities must come as replacements or modifications to existing ones. In this altered situation, it is imperative that throughout the campus we develop the capability to continue to make improvements within our existing funding. Setting priorities for use of scarce resources, always a challenge, becomes ever more important.

Year Round Operations (YRO)

The intent of state-supported year round operations (YRO) is to provide students with several benefits. These include the same fee structure as in the other terms, reducing enrollment bottlenecks during the academic year by offering high demand and general education courses in the summer, and the opportunity for students to accelerate their graduation if they choose. Our first state-supported summer term in 2001 was far more successful than originally planned, with an enrollment demand that exceeded our target of 1145 FTES by 40%. With the summer 2002 enrollment target set at a level equal to the enrollment generated in summer 2001, we will contain costs within the available budget and still serve the needs of our students.

Recognizing the intent of YRO, the increasing number of students who could potentially experience difficulty in getting courses required for graduation, and the limited funding available for the summer term, the Academic Senate recently developed a set of guidelines for scheduling summer term courses:

1. Courses that have the greatest demand during the fall and spring terms for which there is more demand than seats available, and courses that are essential for graduation or progress toward a degree for a significant population of students, have first priority in scheduling for summer term.
2. Schedules shall be made with a view toward student needs rather than faculty preferences. Courses should be scheduled so students will have the greatest possible access to the largest number of courses. For example, a department should not schedule all morning courses or all evening courses. Nor should it schedule all courses in just one of the three summer sessions. Likewise, efforts should be made to avoid overlapping of course times.
3. For faculty, summer term employment is not an entitlement. Under YRO, departments and colleges shall hire faculty members who are best qualified to teach the classes for which there is the greatest demand or need.
4. As in the fall and spring terms, departments are given budgets and enrollment targets for summer term. To meet these targets inasmuch as possible, there should be a cross-section of faculty in the summer term that is similar to the mix of faculty in the spring and fall terms.

5. Department chairs have authority and responsibility for scheduling courses in their departments for the summer term, just as they do for the fall and spring terms. Department chairs shall make recommendations to college deans regarding the assignment of courses. Final authority for those appointments rests with the deans

6. Colleges, departments, and faculty alike have the obligation to ensure that the quality of summer term offerings is commensurate with the fall and spring terms. The fact that the course time frames are compressed is not a justification for diminishing the quality of the educational experience.

7. Chairs shall have discretion when scheduling courses that would not be suitable in a compressed time frame. However, chairs should also keep in mind that it is possible to schedule courses during the summer term for more than six weeks duration. The appropriate department faculty shall be consulted about the duration of any class.

Enrollment Services – Application Processing

CSULB continues to be in high demand with the largest number of applications for admission in the history of the campus. Most applications are received in the first month of the application process in November. Beginning 2002-03, all freshman and transfer applicants will be required to file their applications by November 30. That will create additional workload pressures to provide timely and immediate responses.

In 2000-01, the RPP Task Force recommended adoption of a funding model to support the staffing and operating expense requirements necessary for timely processing of admission applications. That funding model was activated for the November 2000 filing period. Continuing to follow the same methodology, the 2002-03 RPP Task Force reaffirmed that the use of the funding model was a viable approach and recommends that the incremental revenue generated from the application fee be used to support an allocation of \$346,000 to the Department of Enrollment Services.

Enrollment Services will report to RPP annually on the anticipated growth of application volume and on the use of funds to support a timely admission process.

Common Management System (CMS)

The Common Management System (CMS) is a CSU system-wide initiative designed to replace current disparate and outdated administrative systems with a common, integrated one. Application areas include, but are not limited to, Human Resources, Finance, and Student Administration. Our campus embraced the project as an opportunity rather than a mandate since our administrative systems were virtually at the end of their useable life cycle. Thus, CSULB chose to be one of the eleven “first-wave” campuses.

CSULB began its implementation in 1999 with system-wide prototyping and design sessions for the PeopleSoft Human Resource and Finance software. The CSU version of the software was made available to the campus on September 1, 2000.

This central, system-wide approach to implementation did not allow for any local, campus-based collaboration at the design phases, which in turn made our own local “roll out” more difficult. Nonetheless, we had a successful implementation of both systems this past year. We are now stabilizing the operational aspects.

The approach for implementing the Student Administration (SA) Project is much different and allows for greater involvement of the campus community at each project phase. The overall planning and design phases are now completed and the CSU-version of the baseline software was delivered in February 2002. The timeline for implementing the SA Project will span 20 months. The first component scheduled for completion will be the Admissions module, which will be in place this November for the Fall 2003 admissions cycle. Other modules will be sequentially implemented through 2003.

In consultation with RPP, a financing plan was developed in 1998 that allows us to spread the implementation cost over time. An annual General Fund Support Budget of \$1,450,000 together with an initial investment of \$2 million from one-time savings from central operating budgets was established with a repayment schedule that extends into 2010. For next fiscal year, there are no changes in our overall cost estimates for the project and no reason to expect this will change in the foreseeable future.

A campus-wide CMS Steering Committee has been established to oversee the work of the CMS Project, and will provide annual status reports to the RPP Task Force.

Energy

The energy crisis is now behind us, but not without first having a substantial financial impact on the campus. While the electricity and natural gas supply deficits have subsided, consumer prices are higher than before, which reinforces the need to continue our aggressive conservation efforts. We believe we have made adequate fiscal provisions on this campus for energy costs in the upcoming year’s budget, but energy costs remain a concern for future years.

Baseline, Access, and Training Support (BATS) Funding

The University’s general fund budget includes a permanent, base budget allocation of \$651,000 for the Baseline, Access, and Training Support (BATS) Initiative. Each year the RPP Task Force reviews annual spending plans for this base budget.

Changes in technology are beginning to affect the quality of instruction and scholarly activities within academic programs across campus. Smart classrooms, learning management systems, new and refreshed computer labs for instruction and research are the signs that real improvements in the campus technology infrastructure may open the door to productivity gains in teaching with improved learning.

Technology planning is key to the effective and efficient use of resources as the campus enters a more mature technology environment. Faculty, students and staff have better access to instructional and administrative technologies than ever before and this can be a force in driving productive change. The college-based technology planning initiated in 2001-2002 is the foundation for resource decision-making that can better direct campus information technology resources.

The RPP Task Force was pleased to learn that a coordinated college-based technology planning process would play a significant role in prioritizing future resources. Consistent with the BATS multi-year technology plan, RPP concurs with the BATS Committee's recommended non-base expenditure plan for FY 2002-03:

\$413,240	Distributed to Colleges/Library for faculty and staff workstations
\$ 90,000	Academic Computer Services – Technology Help Desk
\$ 62,000	University Library – Information Commons Plan
\$ 60,000	Audio Visual Services for classroom presentation technology installation in university classrooms
\$ 15,760	Disabled Student Services for baseline technology
<u>\$ 10,000</u>	University Academic Programs – staff workstations
\$651,000	Total Expenditure Plan

The RPP Task Force commends the BATS Committee for its efforts to implement a more comprehensive, campus-wide coordination of replacing faculty and staff workstations based upon employee needs compared to the baseline standard. RPP looks forward to a status report from the BATS committee next spring.

Follow-up Items for the RPP Task Force

The Task Force recommends that several items be included on future agendas:

Budget, Enrollment and Common Management System (CMS)

The RPP Task Force will reconvene in Fall 2002 to receive updates on the budget, enrollment, and the CMS Initiative.

Reports on Use of Funding

The RPP Task Force recommends that in the Fall 2002, any division receiving budget augmentations from the President in 2002-03 report to the Financial Affairs Council (FAC) on their expenditure plans. Then in Spring 2003, the division will report on their utilization of these funds to FAC.