

Date: 26 June 2013

To: Steve Rein, Chair, Academic Senate

From: Samuel Frame, Chair, Budget and Long Range Planning, Academic Senate

Subject: Budget and Long-Range Planning Committee Final Report

---

The Budget and Long-Range Planning Committee (BLRP) had two meetings during the Spring quarter. There were a total of four BLRP meetings during the academic year. This report reviews the charges given to BLRP by the Executive Committee and BLRP's efforts to address each charge. This report also includes the current procedures and guidelines, and all documented BLRP efforts to understand and define the responsibilities of BLRP. This includes a recent study of the academic senate BLRP-like committees at other California State University (CSU) campuses.

The executive committee charges for BLRP are listed below and BLRP's efforts to address each charge.

- *Revise guidelines/description/procedures, needs more clear/explicit charge. Due end of fall 2012.* BLRP's procedures and guidelines were revised twice during the academic year. The changes made include adding additional organizational structure to BLRP, specifying general meeting dates, and requiring that all BLRP deliverables be voted on prior to submission. BLRP did not change the responsibilities section. However, BLRP studied the responsibilities of committees at other CSU campuses and discussed the responsibilities section.
- *How to improve the way the budget information is made publicly available.* BLRP studied the way budget information is made available at other CSU campuses, and discussed how budget information is made available at Cal Poly.
- *Better understanding of the budget allocation (meet with Provost).* BLRP was not able to meet with the Provost, and had no discussions about the budget allocation process.
- *Look at strategic plan and suggest criteria for evaluating targeted growth options.* BLRP did not address this charge. During the 7 June 2013 meeting, there was some discussion about the role of BLRP and strategic planning.

One reason that all of the charges were not addressed is because no meetings with quorum were able to be scheduled during the Winter quarter. BLRP has added general meeting dates to allow for more meetings and to make scheduling easier.

### **Observations, Recommendations, and Requests**

BLRP currently has a better understanding of its responsibilities and ways that BLRP can contribute more to the university budget and long range planning. In part, this can be attributed to BLRP's study of other CSU campuses. Many campuses do not have comparable BLRP committees. The most effective committees are university committees, with the more effective academic senate committees better resembling university committees (by way of their composition). Effective committee characteristics include fewer faculty members with longer terms which are staggered, broad representation from administration, and consultation responsibilities on budget and long range planning issues during the decision making process.

There are some unfortunate observations to make about Cal Poly's BLRP. First, there is a large disconnect between the official responsibilities (as contained in the current procedures) and what BLRP actually does. It is clear that BLRP is and has not been consulted with on substantive

budget and long range planning issues during the planning and decision making process. With the exception of a few members, the representation from both faculty and administration changes regularly. Below are some suggestions that could make BLRP more effective.

- *Responsibilities*

- BLRP’s consultative role regarding budget and long range planning issues needs to be more specific and substantial. BLRP recommends that the Executive Committee, the Academic Senate Chair, and/or the Provost determine a realistic and useful role for BLRP regarding budget planning consultation.
- Regarding long range planning, BLRP could be the Academic Senate committee closely tied to strategic planning. BLRP member Hurley suggested the following addition to the *Responsibilities* section of the procedures regarding the strategic plan: “[t]he committee works with the administration to move forward the strategic plan of the University and monitors the progress of the implementation of the plan.”
- BLRP requests that the charges to revise the *Responsibility* section of the procedures and to *look at the strategic plan* be given to next year’s BLRP to further develop, implement, and execute.
- BLRP requests that strategic plan administrator meet with BLRP.

- *Budget information*

- Nearly every CSU makes budget information available online, such as Cal Poly’s Administration & Finance does. Additionally, the Provost and the Vice President for Administration & Finance send electronic updates about the budget. Access to the financial dashboards is currently available for faculty (who have participated in training courses). Several members of the committee are satisfied with the way budget information is made publicly available.
- In order to improve the way budget information is made publicly available, BLRP needs to have a better understanding of what faculty want to know about the budget (and the allocation process) which is not already available, and how could it be made easier to access and understand. BLRP should investigate how to best engage and elicit feedback from faculty via new media technologies.
- BLRP recommends that the Provost and Vice President for Administration & Finance include in their reports descriptions of the various processes used to allocate funds to each of the colleges. These funds should include but not be limited to general state, Cal Poly Plan, and the Student Success Fee funds. How funding is tied to long range planning and targeted growth should also be discussed.
- BLRP requests that the Provost and the new Vice President for Administration & Finance meet with BLRP to discuss the budget allocation process.
- BLRP requests that the charge to *improve the way budget information is made publicly available* be given to next year’s BLRP to further investigate.

- *Organization*

- BLRP requests that future members of BLRP be appointed for three year terms which are staggered and overlapping.

- BLRP recommends that the Executive Committee, the Academic Senate Chair, and/or the Provost determine if the current BLRP model is suitable for the purposes of the Academic Senate and administration. It may be that a different vehicle is needed for faculty consultation on budget and long range planning to be substantive and helpful, provided such a role exists.

## Contents

|          |  |           |
|----------|--|-----------|
| <b>1</b> | <b>Procedures and Guidelines (2013)</b>            | <b>4</b>  |
| <b>2</b> | <b>What Other CSUs Do (2013)</b>                   | <b>6</b>  |
| 2.1      | CSU Bakersfield . . . . .                          | 7         |
| 2.2      | CSU Chico . . . . .                                | 8         |
| 2.3      | CSU East Bay . . . . .                             | 10        |
| 2.4      | CSU Fresno . . . . .                               | 11        |
| 2.5      | CSU Long Beach . . . . .                           | 12        |
| 2.6      | CSU Northridge . . . . .                           | 13        |
| 2.7      | CSU Pomona . . . . .                               | 14        |
| 2.8      | CSU San Diego . . . . .                            | 15        |
| 2.9      | CSU San Jose . . . . .                             | 16        |
| 2.10     | CSU Sonoma . . . . .                               | 17        |
| <b>3</b> | <b>Academic Senate Retreat Focus Groups (2012)</b> | <b>18</b> |
| <b>4</b> | <b>Comments from former Provost Koob (2012)</b>    | <b>20</b> |
| <b>5</b> | <b>BLRP Voting Member Survey Summary (2011)</b>    | <b>22</b> |

# **1 Procedures and Guidelines (2013)**

## **Procedural Guidelines for the Academic Senate Budget and Long Range Planning Committee**

### **Responsibilities**

The Constitution of the Faculty states, "joint decision making and consultation between the administration and the General Faculty have been recognized by the legislature of the State of California as the long accepted manner of governing institutions of higher learning and are essential to the educational missions of such institutions. [T]he Academic Senate is empowered to exercise all legislative and advisory powers on behalf of the General Faculty. Advisory powers shall include, but not be limited to consultation on budget policy, administrative appointments, determination of campus administrative policy, University organization, and facilities use and planning."

The Budget and Long Range Planning Committee (hereafter BLRP) shall review and make recommendations concerning policy for the allocation of budgeted resources and long range planning decisions. BLRP shall have representation on bodies formed to review the mechanisms by which campuswide resource allocations are made. BLRP shall work cooperatively and in consultation with administrative departments, units, representatives, and staff members. Budget and long range planning tasks assigned to specific, standing committees of the Academic Senate fall within the purview of BLRP. BLRP shall continuously develop and maintain definitions of budget transparency and faculty consultation on budget and long range planning issues.

Business items may be given to BLRP by the Academic Senate, Executive Committee, and/or the Senate Chair. BLRP may send to the Executive Committee a recommendation in the form of a draft resolution in order that it be placed on the Academic Senate's agenda. BLRP's recommendations shall not be considered policy statements until formally approved by the Senate and/or Executive Committee.

### **Membership**

Shall include one voting General Faculty representatives from each college and PCS. Ex officio members shall be an ASI representative, Vice Provost/Vice President for Academic Affairs or designee, and Vice President for Administration & Finance or designee.

### **Organization**

BLRP shall organize the committee members into two working groups: Long-Range Planning and Budget. The Long-Range Planning working group will be responsible for completing the long-range planning charges given to BLRP by the Executive Committee and representing BLRP outside the committee as needed. The Budget working group will be responsible for completing the budget charges given to BLRP by the Executive Committee and representing BLRP outside the committee as needed. In general, the two units will meet and work as a team with the option to act as subcommittees on an as needed basis.

### **Responsibilities of the Chair**

The BLRP Chair (hereafter the Chair) is responsible for scheduling meetings, setting an agenda, and conducting all meetings. After each meeting, the Chair will provide meeting minutes, including votes taken by BLRP on business items. At the end of each quarter, the Chair will submit a report to the Senate Office including a summary of the BLRP's work and accomplishments. At the end of

each academic year, the Chair will conduct an annual review of BLRP's work and accomplishments, and provide an evaluation on how they fit within BLRP's responsibilities.

### **Meetings**

BLRP shall meet at least three times per quarter. Meetings shall be scheduled during normal work hours, during the third, sixth, and ninth Friday of each quarter. Notification of meetings shall be sent at least five working days before the meeting date. A quorum is required to conduct business. A simple majority of the voting members shall constitute a quorum for a meeting. A vote by the majority of the voting members attending a meeting constitutes the recommendation of BLRP. Voting shall take place by a show of hands unless one attending member requests a secret ballot. Electronic meetings may be conducted as described in AS-721-10.

### **Reporting**

All BLRP deliverables must be voted on and approved by the BLRP voting members before dissemination. Minority opinions may be submitted to the Academic Senate for consideration. All meeting minutes, reports, and minority opinions will be made available to the General Faculty by way of the Academic Senate.

Dated: Spring 2013

## 2 What Other CSUs Do (2013)

- Objectives of the investigation
  - (1) Help develop and define BRLP's role
  - (2) Address the charge to revise BRLP's procedures and guidelines
  - (3) Address the charge to improve the way budget information is made publicly available
- Considerations
  - What do their Academic Senate budget and long-range planning committees do? In the committee procedures, is there anything we could add to our own procedures?
  - Are there other committees not affiliated with the Academic Senate, and what do they do?
  - How does the institution make the information publicly available? Is there anything they are doing that we should be doing?
- CSUs Considered: Bakersfield, Chico, East Bay, Fresno, Long Beach, Northridge, Pomona, San Diego, San Jose, Sonoma

## **2.1 CSU Bakersfield**

### **Committee Name: Budget and Planning Committee**

- Affiliated with Academic Senate
- Meetings three to four times per quarter
- No guidelines or other information made available, just a list of dates and meeting minutes
- Meeting minutes: CSUB Master Plan, charged with approving minor capital outlays and received updates from their administration, updates from Athletics on the impact of joining the WAC, discussion of joint doctoral proposal at CSUB and other new degrees impact on tuition, tuition costs for the summer

### **How budget information is made available**

- Made available at the Budget Office website
- Budget forums where they provide information (November 2012 was last meeting/presentation)
- Also contains other information at the CSU level, the Board of Trustees, and legislative facts/impacts

## 2.2 CSU Chico

### **Committee Name: University Budget Committee**

- Not affiliated with the senate, University Planning Committee is not active
- Committee membership: 7 faculty, 2 students, 8 other (Dean, CFA President, Provost, VP Finance, VP Student Affairs, VP Advancement), 11 support (Human Resources, Assit VP for Faculty Affairs, another Dean, the Budget Director, Facilities Manager, Vice Provost for Operations, Admissions Office)
- The charge to the Committee is to meet regularly to review the relationship of academic programs and campus budget; to provide timely participation by faculty and students in budget processes; to propose broad strategies for adjusting the academic programs and budget to one another; and to review the effects of their implementation before adoption by the University.
- Functions
  - To monitor and make recommendations on budget decisions during the decision-making process in accordance with the calendar of the university budget processes.
  - To consult on an ad hoc basis with the Provost's office, the Fiscal Administration Committee, and university officers prior to budget decisions that will affect academic programs.
  - To recommend changes in budget formulation and allocation procedures necessary to achieve the short- and long-term goals of the academic programs.
  - To provide and to publish agendas and minutes of meetings on a regular basis and to provide analysis, evidentiary support, and recommendations on budget-related matters as needed to the campus community.
- Procedures
  - The first committee meeting of each academic year will be called by the Chair of the Academic Senate during September.
  - The orientation session will be conducted during September.
  - The Provost, Vice President for Business and Administration, and other relevant officers will provide to the committee timely budget information necessary to the group's performance.
  - Committee deliberations, recommendations, and findings will be reported directly to the appropriate Vice President and the President.
  - The Committee will report to the Academic Senate monthly and in special circumstances as may be deemed appropriate by the committee or the Senate.
- Budget information provided to the committee directly
  - At a minimum, the following materials will be regularly provided to the UBC
  - Annual Plans of Academic Programs - Provost
  - Provost Office Agendas - Provost



- Fiscal Administration Committee Agendas and Minutes - Vice President for Business and Administration
  - Deans' Task Force Reports - Provost
  - Chancellor's Office Budgetary Subcommittee Agendas and Reports - Appropriate Campus Administrator
  - Budget and Planning Options Originating in the Chancellor's Office - Appropriate Campus Administrator
- No minutes available

**How budget information is made available**

- Made available at the Budget Office website
- Historically, budget forums (no documentation after 2007-2008)

## 2.3 CSU East Bay

### **Committee Name: Committee on Budget and Resource Allocation (COBRA)**

- Affiliated with the Academic Senate
- Meets six time per semester
- Committee membership: nine tenured members from the faculty of the University, two appointees of the President of the University, one from Academic Affairs and one from Administration & Finance. Faculty members shall be elected for two-year, overlapping terms. Because it is expected that members of the committee will develop special expertise in budgetary and financial matters, there shall be no term limitation on membership in the committee. It is expected that in ordinary circumstances the Chair of the committee shall be an elected member of the committee and shall serve in that capacity for at least one year.
- The goal of the Committee on Budget and Resource allocation is to enable and ensure active faculty participation in the fiscal planning and budget development processes.
- Duties
  - To recommend to the Academic Senate budgetary principles and policies that help the University to achieve its long-term academic goals in the light of changing conditions.
  - To make recommendations to the Academic Senate on the development, improvement, and use of university-wide resources.
  - To consult with the appropriate administrators and committees of the administration regarding academic planning, current budget issues, allocation of resources, and campus development, and to report periodically the nature of the consultation to the Executive Committee of the Academic Senate.
  - To make recommendations concerning principles and policies to the Academic Senate governing the development, improvement, and use of the academic facilities of the University and the allocation of funds and human resources directly related to the instructional program.
  - To consult, when appropriate, with other Standing Committees.
- Establish ad hoc subcommittees as deemed necessary
- Meeting minutes: regular visits from administrative partners, but no indication the committee is used during the budget allocation process

### **How budget information is made available**

- Presentations to the Academic Senate
- Budget information is made available on the COBRA website
- Budget information made available on Budget Central website

## **2.4 CSU Fresno**

### **Committee Name: University Budget**

- Not affiliated with the academic senate
- Meet 15 times a semester
- Committee membership: smaller membership with faculty members serving for three years, little administration representation
- The University Budget Committee shall be the deliberative body of the faculty on budget and resource use as they affect the University and including but not limited to instructional budget, allocation of faculty positions, allocation of space, institutional support budget, the athletic budget, facilities planning and selfsupport programs.
- Meeting minutes: regular visits from administration partners, budget model development, discuss distribution of funding

### **How budget information is made available**

- Made available at the Office of Budget & Resource Planning website

## 2.5 CSU Long Beach

### **Committee Name: University Resources Council**

- Affiliated with senate, but better resembles a university committee
- Meet two times per semester
- Committee membership: Provost and Senior Vice President for Academic Affairs (or designee), Vice President for Student Services (or designee), Vice President for Administration and Finance (or designee), Vice President for University Relations and Development (or designee), Deans of the Colleges (or designees), Dean, Library Services (or designee), four tenured or tenure track faculty members from the College of Liberal Arts, and two from each of the other Colleges, one tenured or tenure-track librarian, one tenured or tenure track student services professional, one lecturer who shall serve for a period of one year, one member from the Academic Senate elected by the Academic Senate, one Department Chair, one full-time staff member, two student members
- The University Resources Council shall serve as the primary faculty advisory body to the Academic Senate and University Division heads on matters associated with the University budget. The University Resources Council is subordinate to the Academic Senate, and, as such, all policies and regulations recommended by the University Resources Council shall be presented to the Academic Senate for approval, except for those matters specifically delegated to the University Resources Council. The University Resources Council shall review University financial reports and make recommendations arising from these reports. The Council shall review, evaluate, set priorities where appropriate, and make recommendations on fiscal and business matters.
  - Instructional resources
  - Allocation of faculty positions
  - Allocation of space
  - Institutional support budget
  - Athletic budget
  - Self-support programs
- Provide summaries of funding uses, in addition to Budget Central office
- Meeting minutes: regular visits and updates from administration, discussion of implications of tax initiatives, enrollment updates, implications of various new programs

### **How budget information is made available**

- Reports developed by the committee
- Made available at the Budget Central website

## 2.6 CSU Northridge

### **Committee Name: Educational Resources Committee**

- Affiliated with Academic Senate
- Meet twice a semesters
- Committee membership: eight members elected by the Senate, two members appointed by the President of the University.
- This committee shall make general policy recommendations in order to guide the allocation of all University resources which impact educational program. In carrying out its charge, the committee may review and advise on current and proposed allocation of faculty positions; the allocation and the projected needs for space; support equipment and operating expense budgets; the allocation of resources for technology; the assignment and projected needs of support staff; the recommendations of other faculty governance committees which have significant educational resource implications; additionally, at the request of an appropriate University committee or an Associate Dean, independently evaluate proposals for new programs with regard to their impact on the available educational resources of the University
- Meeting minutes: hiring new positions, discussion of Northridge's Funding the Future of the CSU, equipment allocations, space utilization, budget allocations, capital projects, purchasing,

### **How budget information is made available**

- Campus Budget News website
- Budget Planning and Management website

## 2.7 CSU Pomona

### **Committee Name: Budget Committee**

- Affiliated with the Academic Senate
- Meetings scheduled 7-9 times per quarter
- One faculty member from each Academic Senate constituency (college/school), the staff representative to the Academic Senate, a student representative appointed by ASI. Faculty members shall serve three year staggered terms.
- Responsibilities
  - The Committee shall be the deliberative body of the faculty on general fund budget and resource use as they affect the University including, but not limited to, the instructional budget, the academic support budget, the student support budget, the institutional support budget, the allocation of facilities and positions, as well as the allocation of new funds and special funds such as lottery funds.
  - The Committee shall be consulted and assist in the formulation of the policies, priorities, and guidelines by which University resources are requested and allocated.
  - The Committee shall ensure that budget and financial reports are provided to the Academic Senate and made available to the campus community on an annual basis. The reports shall include, but are not limited to, salaries, release time, operating expenses, University Educational Trust, and lottery funds. The divisional reports shall also document all sources and uses of funds in addition to the annual increases and decreases.
  - The Committee shall bring reports and recommendations to the Academic Senate, as do all other standing committees.
  - The Committee chair shall make regular reports to the Executive Committee of the Academic Senate and to the faculty as a whole.
- Meeting minutes: no minutes available

### **How budget information is made available**

- Administrative Affairs Division Budget Information website

## **2.8 CSU San Diego**

### **Committee Name: Academic Resources and Planning**

- Affiliated with the academic senate
- Schedule of meetings unclear, none listed past 2007
- Nine faculty members, one staff, Provost or designee, Associate Vice President for Academic Resources, Vice President for Business and Financial Affairs, and Vice President for Student Affairs or designee, two students
- Makes recommendations to the Senate and, within policy guidelines established by the Senate, to appropriate administrative officers concerning the allocation of University resources. The Committee shall act as the deliberative body of the Senate on all issues pertaining to, but not limited to, University budgets, allocation of facilities and positions, and allocation of special funds, e.g., Instructional Related Activities and lottery program funds. The Committee's role shall be to review and recommend budget allocations, to review patterns of previous expenditures and propose changes as they may affect instructional programs, and to make general policy recommendations regarding present and future resource decisions.
- Meeting minutes: none available after 2007

### **How budget information is made available**

- Budget Central website, includes a general discussion of budget process

## **2.9 CSU San Jose**

### **Committee Name: Budget Advisory Committee**

- Affiliated with Academic Senate, but not active. Responsibilities are now that of the Executive Committee (by way of a Academic Senate Resolution).

### **How budget information is made available**

- University Budget Office website.

### **Considerations for BLRP**

- Procedures: none
- Making budget information available: none
- BLRP Role: deactivate committee and move responsibilities to the executive committee



## **2.10 CSU Sonoma**

### **Committee Name: Academic Senate Budget Subcommittee**

- Affiliated with the Academic Senate
- No meetings indicated
- Six faculty members, two administrative representatives
- To inform and educate the Senate and its committees on an ongoing basis regarding the University's budget process and current budget allocations; to review the University's budget, budget process, and budget allocations, and to make recommendations to the Senate and its committees on academic and instructional priorities making claim on the University's budget.
- Meeting minutes: not available

### **How budget information is made available**

- Not identified

### 3 Academic Senate Retreat Focus Groups (2012)

At the Academic Senate retreat, the break-out groups were asked to provide input/feedback on the following question specific to BLRP.

“The Academic Senate Budget and Long Range Planning Committee (BLRP) is the main body that exercises the Academic Senate’s ”advisory powers” over the budget. What does the BLRP need to know regarding the budget and long term planning in order to help the university move forward successfully with a plan to support and maintain excellence as a comprehensive polytechnic university?”

The answers from each break-out group are contained below.

- Table 2: A better alignment between the allocation resources and goals - appropriate reward system
- Table 3: Need more time for meaningful deliberation and ideas here. This is only a good beginning. Need to brainstorm. High-powered talent inside and outside this room, we CAN come up with more options than what we have heard so far
- Table 4
  - Budget implications of co-curricular activities not being exploited
  - Fully understand mode and level model approach
  - How much does learn by doing cost the university?
  - Quantifying the value of small classes and learn by doing, in comparison to more traditional approaches
  - Informing the faculty on the cost of instruction
- Table 5
  - Senate needs to be an equal partner in helping shape a shared vision of enrollment goals, financial multi-year commitments to fund the growth, and facilities.
  - Fundraising is a critical component to helping smooth out the ups and downs of state funds and this requires a shared compelling vision for where we want to go.
  - Senate and administration also need to have a way to respond creatively and quickly when external conditions change.
  - Better systems need to be in place to help all constituents on the campus to understand and embrace shared enrollment/funding/facilities plans, and what changes may be necessary along the years.
  - Senate needs history and context to help address annual issues and be a good partner in helping achieve common goals, OR to make necessary changes. Some of this will require the senate to help new academic leadership and committee chairs to have sufficient history, and current information, with which to act.

- Table 6

- What types of funds can be used for what? Restrictions, other sources, limitations.
- Who makes the decisions and what formulas are used?
- What are all the resources and costs that go into education our students?
- How can departments / colleges get additional funds for changes in curriculum, technological needs, etc?

- Table 7

- Quality of labs, equipment.
- Getting back to educational basics - reduce the noise - committees, etc.
- Evaluate classes - what is most effective way to teach each course - tenured faculty, grad student assistants, small lecture, large lecture, add discussion sessions, etc.

## 4 Comments from former Provost Koob (2012)

### Taken from the 2012 Academic Senate Retreat minutes:

I will talk about long term budget implications, enrollment management, and budget and long range planning. There is a major shift happening in the state of California and the view of public education. California became famous, across the world, for its master plan in education which said that education is a public good, in the best interest of the people of California, the economy of California, etc., to make sure that a large number of people is educated. The premise was that everyone should have access to a free public education. Access was key. California built one of the most successful corporate developments in the state. Even today, California is spending less on state government than ever in the history of the state, we are still wealthy. What has changed is our perception of what education is and whose responsibility it is. This began to change in the late 80s when we could no longer fund it. There was a formula for each activity (labs, lecture, etc) in every campus and how to fund. The budget got rewritten in the 90s by the legislatures due to the large amount of students. It was never a funding reduction; it was an adjustment of expectation. The way funding flowed to campus started to change by replacing the complex formula with something call marginal cost increase. This had high implications on a polytechnic campus. We have high exposure to expensive programs. The reason we were able to retain the difference was because of the Cal Poly plan and college based fees. Marginal cost allows for XXX of dollars for each freshman without looking at the cost of education or program as the students progress. California has been high in access with little regard for graduation. After that, Cal Poly adapted, and worked well until a few years ago. All budget tracking was lost and everyone was blaming each other for lack of funding. Last time we proposed the last round of college fees students agreed and passed. That would have helped all the budget cuts. Three years ago we were \$1000 below for each student, since then we have lost \$60+ millions. This is more than a lot of CSU campuses ever got. The public doesnt see the problem. The public sees student fees going up. The students feel like they are paying more and getting less. In order to justify raising fees and due to Californias commitment to access, 1/3 of that fee increase goes to financial aid. I understand the argument for education being a public good but dont understand why a group of students should have the obligation to educate another group of students. We have taken the responsibility for access from the tax payer. We have disinvested as a whole.

Second problem - due to furlough the expectation was to reduce the system enrollment by 10% and that is how targets were set. Suddenly, within six months, we were told to raise the target (3 times) to get more money from the state. The targets went up, the money was promised but it never happened. One factor is an increase in workload and the reduction in marginal cost support for students. Since we didnt raise our target all the way, our budget was cut. Bottom line, we are not getting the dollars to supports the students we are asked to educate. We made a proposal to find student who can subsidize others so we target out of state students. Never imagine how successful that was. It will offset the reductions. Long term we have lots of choices. How do we maintain our commitment to a high quality education in a polytechnic university? Cal Poly plan is a good example. How do we account for lower marginal cost increase per students? I dont see a way to do that today. President Armstrong has proposed to look at international students based on the diversity they bring to the campus. We are left with an increase work load and we have to find another way to maintain the quality of what we do by providing the same quality of education to our students. Some things we could do is raise all class size, other CSUs are doing that but Im not proposing that. Another possibility, the one that allowed us to be successful, is to make sure

students move more rapidly thru the curriculum. Another possibility is to instead of thinking of students as liability, to think of them as a resource. For example have them teach labs, lecture class, etc. we underutilize our students on this campus. Our students are smart and motivated, lets involve them. Im inviting everyone to debate this: What do we do that doesnt jack up the work load of faculty? What would help students improve? Those kinds of things will only happen if routine tasks are done by others. I do believe there are choices that we still have that will allow us to accommodate this long term structural change.

The average incoming class at Cal Poly when we were at 17,350 students was around 4,000. This year our target is 16,000 but our incoming class is over 4,000. How do we handle this? We move students thru faster and that allowed us to provide service to more students in the state of California. The number of California students has remained the same even though our target has been reduced. We are also bringing out of state students. When our target was 16,000, our models seem to be consistent with the number of students coming in, which is usually less. Our show rate went up by 3% at the same time; we are going to increase the size of the transfer class this year because we need a group of people to move through. We are trying to make sure we have an even flow of students, planned out department by department, and that requires good information. The budget committee can help in determining how to put all this together. When admission is opened to international and out of state students enrollment cant be targeted by major like state students. All we can do is set an academic threshold for academic qualifications. Certain major attract more students than others. It doesnt impact us immediately by it does when they do migrate into majors. If we are going to have multiple sources of income, we have to reward appropriately the efforts that feed that income. We need to figure out what reward structure will look like. Want to invite Academic Senate budget to sit in consultation to determine how much money will follow each students. Need to have funds from discretionary sources follow students. Second task is the interaction between the budget and curriculum. Strongly believe that not accepting responsibility for understanding the economic impact of curricular decisions, that diminishes the value of consultation on the curriculum. How many courses we need to educate all of our students? We need to become intentional about what we do. We need to understand the mix of curriculum we have and how it impacts the demand of our resources.

## 5 BLRP Voting Member Survey Summary (2011)

- Do you usually read the budget update from Provost Koob and VP Kelley?
  - No: 0
  - Yes: 4
- Do you usually understand the budget update from Provost Koob and VP Kelley?
  - No: 0
  - Yes: 3
  - Sometimes: 1
- Does your role as a BLRP member help to increase your understanding of the budget update from Provost Koob and VP Kelley?
  - No: 1
  - Yes: 3
- Could you explain budget issues and decisions to other faculty, in more detail and with more specificity than what is published in budget update from Provost Koob and VP Kelley?
  - No: 1
  - Yes: 1
  - Sort of: 1
  - To a certain extent: 1

### Comments:

- Sort of. They have the original data, but sometimes they don't explain the intricacies in those emails.
- Yes, in some cases I could provide some more information. However, I do not feel confident that I could answer many questions that faculty may ask. This is because I feel like I only understand some components of the budget. I don't understand the big picture. Also I don't understand how many of the components fit together. I don't understand/know how decisions are made, who makes those decisions. I don't understand the full implications of decisions that are made. (For example, I probably wouldn't be able to recognize all of the consequences (including the unintended consequences) of decisions that are made.)

- Do you feel as though the administration engages BLRP to give further information about the budget that faculty need/want to know?

- No: 1
- Yes: 2
- Sort of: 1

Comments:

- I think the information that is given is sometimes limited.
- Superficially, yes, but we haven't yet defined what the overall structure of advise and consent looks like, so whatever engagement occurs is without much context, and therefore isn't that valuable.
- Sort of. I think Provost Koob and Kimi Ikeda have been helpful, but nobody has prepared any sort of overall summary of the campus budget. So it is hard to get the big picture, even with their assistance. I don't know for sure, but it surprises me that VP Kelley has not tried to get to know us at all.
- Making the dashboard available was helpful. The folks from administration that have attended the BLRP meeting have answered questions they have been asked and, I believe, have tried to be helpful (especially Kimi). There have only been a few topics where I felt we didn't get adequate answers.

- Are there strengths and skills you bring to BLRP which are not being utilized? If so, which?

- No: 2
- Yes: 2

Comments:

- I think have the ability to communicate well with many different constituencies on campus including faculty, staff, students, and administration.
- I have been too busy to provide much assistance, so the answer is yes, but it is my fault and not the committees.

- Are you willing to learn more about budget issues on behalf of the faculty? If so, which?

- No: 0
- Yes: 4

Comments:

- I would like to know how decisions are made with regards to divvying up resources to each College and departments (who is involved in these decisions).
- Yes, but it's hard to say which without a larger perspective, which I don't have.
- I would like to help the campus prepare a complete summary of all major \$\$ sources and sinks. The Energy Information Administration prepares graphs (see attached) which I think we should use as a framework. I would happily help develop these, but only if the entire campus (state side and affiliates) supports the effort. Right now, there is very little support for such an effort.
- Any of them