SECTION SEVEN: FINANCIAL RESOURCES

STANDARD 7: Be afforded sufficient funding from recurring accounts to ensure program success.

Briefly, describe how the Degree Program complies with the above standard.

The Construction Management (CM) program at California Polytechnic State University, San Luis Obispo, is supported by a combination of recurring institutional funding and non-recurring external resources that collectively ensure the program's ability to achieve its mission, goals, and objectives. The CM program demonstrates strong financial stability through consistent university support, strategic allocation of college resources, and significant contributions from industry partners. These funding streams enable the CM program to provide high-quality instruction, retain an appropriate number of faculty and staff, support student success initiatives, and continuously enhance facilities, technology, and experiential learning opportunities consistent with Cal Poly's "Learn by Doing" philosophy.

7. REQUIREMENTS

7.1. BUDGETED FUNDS

7.1.1. Indicate the amount and percentage of operating revenue and expenditures for the construction Educational Unit and units within the institution that are comparable in size and function to the construction Educational Unit.

Operating revenue for the CM department comes from five major types of resources:

- State Allocations
- IRA (Instructionally Related Activity) Funding
- University Campus Programs (UCPs)
- University Foundation Endowments
- Sponsored Programs under Cal Poly Partners

State funds are allocated by the state, and the budgets are strictly controlled. Recurring state allocations are administered by the College of Architecture and Environmental Design (CAED), and these funds support:

- Faculty and staff salaries
- Instructional activities
- Operational expenses associated with program administration

Instructionally Related Activity (IRA) is an "out-of-class experience" that provides enrichment to students and enhances their learning at Cal Poly. Funding for recognized IRAs is provided through student fees. All IRA programs are partially sponsored by an academic dean or department and are "integrally related" to a formal instructional program.

University Campus Programs (UCP) are university-supported programs that are administered through the Cal Poly Foundation rather than directly through state (general fund) accounts. UCPs include the funds that hold monies that can be used for bonafide University business purposes and may be subject to specific restrictions. The funding sources of UCPs are donations, which can come from private parties, institutions, foundations, etc. the CM Department Head is the fund director of all accounts owned by the CM department.

Sponsored Programs (CSP) under Cal Poly Partners are projects, programs, or activities funded by external sponsors (typically industry partners, corporations, or agencies) and administered through Cal Poly Partners to support university-related work. The monies in the sponsored programs must be spent in accordance with the proposal and award terms.

University Foundation Endowments include funds for scholarships and facility upgrades and student employees.

As enrollment in the CM program has grown significantly over the past decade, institutional funding has generally scaled to support instructional demand, including the strategic use of full-time lecturers and part-time faculty to maintain course availability and manageable class sizes

*Table 7.1.1 Construction Educational Unit and Comparable Units Operating Revenue and Expenditures for the Prior Fiscal Year**

TEMPLATE - In the table in the accompanying Excel file named **Document 102 – Tables (date), Tab Table 7.1.1,** enter the appropriate line items and dollar amounts, and copy the completed table here.

	Educational Unit		**Comparable Unit**	
Revenue Source	**Revenue Amount $**	**% of Total**	**Revenue Amount $**	**% of Total**
Institutional Funds				
Institutional Funds	$3,689,430.00	89.94%	$2,795,958.00	77.28%
Other (specify each; exclude non-recurring funds)	$374,766.00	9.14%	$800,870.00	22.14%
IRA	$38,000.00	0.93%	$20,990.00	0.58%
TOTAL REVENUE	**$4,102,196.00**	**100%**	**$3,617,818,00**	**100%**
Expenditure Type	**Expenditure Amount $**	**% of Total**	**Expenditure Amount $**	**% of Total**
Personnel Compensation				
Faculty	$2,252,466.88	61.90%	$1,775,552.37	64.51%
Staff	$114,444.00	3.14%	$98,900.91	3.59%
Other (Student Assistants/ISAs)	$84,409.69	2.32%	$50,959.32	1.85%
Benefits (Faculty and Staff)	$1,187,603.12	32.64%	$827,094.93	30.05%
Subtotal Salaries	**$3,638,923.69**	**100.00%**	**$2,752,507.53**	**100%**
Operating				
All operating Expenses	$50,506.31	100.00%	$43,450.89	100%
		0.00%		
Subtotal Operating	**$50,506.31**	**100%**	**$43,450.00**	**100%**
TOTAL EXPENDITURES	**$ 3,689,430.00**		**$2,795,958.42**	

7.1.2. Indicate what the projected resources shall be to ensure the capacity of the Degree Program to achieve its planned growth, future goals, and objectives.

Current financial resources are adequate to maintain the existing program. However, the CM Department has experienced a steady increase in enrollment in the last six years. This increase in enrollment has not been met with a similar percentage increase in resources. Increased demand due to increased enrollments has been used to justify budget increases each year.

A plan of action is being undertaken to increase funding received from the state, university, and the construction industry. A course of action has been taken to ensure that resources will be adequate to meet future goals and objectives for the CM Department. Current resources enable the degree program to achieve its mission, goals, and objectives, but program growth will only occur if additional resources support the increase of student enrollment.

7.2. NON-RECURRING FUNDS

7.2.1. Identify the source, amount, and use of nonrecurring funds (soft monies, annual gifts, donations, etc.) for the Degree Program.

The CM program receives substantial nonrecurring financial support through industry partnerships, alumni donations, corporate sponsorships, grants, and auxiliary accounts administered through Cal Poly Partners. These funds supplement recurring university allocations and play a critical role in supporting student success, program innovation, faculty development, and industry engagement activities.

The CM program maintains strong relationships with industry partners and alumni, which has resulted in continued financial support aligned with the program's mission and strategic priorities. These supplemental resources significantly enhance the student experience and allow the program to provide high-impact educational opportunities beyond what is possible through recurring state funds alone. Below is the list of non-recurring funds available in the CM department.

CM's University Campus Programs Fund Number	Fund Name	Balance
60092	CEA SURF	$31,056.78
60491	NAHB Competition	$7,507.84
60531	DBIA	$68.75
61591	CM Service Learning	$26,328.09
62020	Pankow Concrete Lab	$2,759.61
62630	CM-Professional Development	$2,706.26
62650	Real Property Dev'l Minor	$2,475.00
64501	National Housing Student Travel	$1,263.36
64601	ASC Competition	($70,727.38)
65025	CEA SMART & SURF Fund	$18,544.70
65167	Granite Heavy Civ Eng & Cnst Ed (CM)	$206,099.83
65168	Granite Heavy Civ Eng & Cnst Ed (CE)	$239,353.34

CM's University Campus Programs Fund Number	Fund Name	Balance
65205	Ken Brickwedel Memorial Fund	$4,417.68
65351	CM Parent Learn by Doing Fund	($615.48)
65355	CP Solar Powered Refrigeration	$64,975.34
65542	Pankow Classroom Fund	$25,070.98
65552	Whiting-Turner Prof CM Saf E/I	$6,659.00
65582	ASC Competitions- All regions	$0.00
65971	ABC Competition	$1,300.00
70026	RELUI	$1,800.00
70039	Women in Construction	$3,836.73
70076	CM Spaces + Places	$20,545.73
72400	Dept Discretionary	$88,125.72
CPR02	Donor Wall Faculty Research TBD	
69014	Building fund CPR95	$123,000.00

CM's Endowment Funds	Fund Name	Balance
P3019	Granite Beavers Heavy Civil Eng	$3,258,899.89
P3109	Ken Brickwedel Memorial Fund	$44,236.00
P3161	Whiting-Turner Laboratory Endowment	$87,219.00
P3163	De Mattei Construction Endowment	$42,740.00
P3275	Whiting-Turner Professorship End	$408,174.00
P3720	Charles Pankow Bldrs.	$98,732.00
P3730	CM Endowment	$195,694.00
P4060	Granite Construction	$66,484.00
P4280	Rudolph & Sletten	$15,479.00
P4330	DPR	$31,888.00
p4520	CEA	$78,630.00
p4610	Hathaway-Dinwiddle	$71,747.00
p4690	Hensel Phelps	$15,942.00
P4850	CM Grads	$16,473.00
P5220	Clark Construction Group	$15,882.00
P5930	National Housing Student Travel	$15,926.00
06061	Kris Cello Scholarship	$36,508.00
06620	Beavers Hvy Const. Scholarship	$519,011.00
P8062	William H Brown Scholarship En	$12,865.00
P8323	Alandt Family Scholarship En	$14,132.00
P8434	CMAC Scholarship End	$11,504.00
P8690	Blair Tulloch Scholarship	$2,709,544.17
P8571	Morley Builders Scholarship End	$112,656.00
PQ068	Vinnell Foundation Scholarship Quasi	$140,152.00

7.2.2. Detail how any nonrecurring funds have been used in the last three fiscal years.

There are two primary types of nonrecurring funds at California Polytechnic State University: University Campus Program (UCP) funds and endowment funds. UCP funds are university-approved auxiliary accounts administered through Cal Poly Foundation that support programs, activities, and services aligned with the educational mission of the university using non-state revenue sources such as donations, sponsorships, program income, and event revenue. In contrast, endowment funds are invested through Cal Poly Partners, and a portion of the annual investment earnings is distributed to support departmental activities while preserving the principal balance to provide long-term financial sustainability.

Endowment funds provide long-term financial support for strategic priorities that enhance student learning, faculty development, industry engagement, and program innovation. These funds support initiatives such as scholarships, instructional enhancement, faculty professional development, laboratory improvements, and student experiential learning opportunities. The CM Department maintains several endowed funds dedicated to advancing the department's mission and supporting student success.

UCP funds are used to supplement general operating expenses and enhance the student educational experience beyond what is possible through recurring state funding. Examples include support for student employees, educational supplies, instructional technology, travel, marketing, recruitment, conferences, faculty development, and general office operations. A significant portion of nonrecurring funds has been allocated to support student experiential learning, particularly through participation in national and regional competition teams such as ASC, DBIA, MCAA, NECA, and others. These funds support student travel, registration fees, materials, and logistics, resulting in consistently high levels of participation and national recognition. These investments directly support the CM program's "Learn by Doing" philosophy by providing hands-on, team-based learning experiences beyond the classroom.

When this Section is complete, upload it to the appropriate sub-folder within your institution's folder on the ACCE internet-accessible file space:

Semester - Institution - Self-Study Documents / Section 7 - Financial Resources