

State of California
Memorandum

CAL POLY

San Luis Obispo

To: College of Science and Mathematics
College Based Fee Committee

Date: June 3, 2009

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From: Philip S. Bailey, Dean
College of Science and Mathematics

Subject: Distribution of College-Based Fee Revenues for 2009-10
College of Science and Mathematics

This memo conveys the final decisions for distribution of College Based Fee revenues for 2009-10. I want to extend my appreciation to the College Committee as well as the students and members of the faculty and staff who composed the department College-Based Fee Committees. Thanks also to the College of Science and Mathematics Student Council for monitoring the process. The College-Based Fee has encouraged a partnership and engagement among our students, faculty, and staff in advancing our college, departments, and programs and securing our future. Again, thanks to all involved.

The original proposal for the College-Based Fee, overwhelmingly approved by College of Science and Mathematics students in March, 2002, stated the following priority needs for support:

- Instrumentation and Equipment.
- Faculty Recruitment and Development
- Student Research
- Access to Classes

Since this time, almost 11 million dollars has been distributed to our six departments for these general purposes. This has made a huge difference in every thing we do and is particularly visible in the quality of our student-faculty research programs and the equipment we have in our laboratories. This year, two other units join the College of Science and Mathematics: the School of Education and the Liberal Studies Department. Simultaneously, the State of California's horrendous budget problems dramatically influences the distribution of College Based Fees and the 2009-10 calendar year.

Distribution of fee revenues is based on need, nature and quality of proposal, and student headcount by department. The ultimate goal is for each department or school, over time and regardless of size, to achieve a clearly recognizable level of distinction because of the College-Based Fee.

Projected College-Based Fee Revenues for 2009-10

Cal Poly projects the following number of students enrolling in the College of Science and Mathematics during the 2009-10 calendar year. These numbers include the College of Education and the Liberal Studies Department, merging with the College in 2009-10.

Projected Headcount Enrollments: College of Science and Mathematics 2009-10

Summer 2009	Fall 2009	Winter 2010	Spring 2010
687	2628	2521	2392

- College-Based Fee for students taking greater than eight units in summer is \$262 per quarter; other summer students pay fees of \$131 per quarter. In the summer as few as one-third of students may be taking more than eight units.
- College-Based Fee for students taking greater than six units in fall, winter or spring is \$262 per quarter; others pay fees of \$131 per quarter. During the academic year we anticipate approximately 98% of College of Science and Mathematics students will be taking more than six units.
- A small number of students qualify for fee waivers (less than 0.2%).
- Although Cal Poly students overwhelmingly voted during winter quarter 2009 for a CBF increase of \$300 per year for three years (\$900 total), the Chancellor's Office has asked that implementation be delayed. This voted increase is NOT included in these calculations.

Based on these estimates, we project the following College-Based Fee revenues for the College of Science and Mathematics to be somewhere between \$2.0 and \$2.1M. Conservatively:

2009-10 Projected Revenues: \$2,000,000

Approximately \$1.5M projected generation by the original six departments of the College of Science and Mathematics, \$325K by the Liberal Studies Department, and \$175K by the School of Education.

Summary of Proposals

Proposals from the departments are shown in the following table. All units were aware of the economic and budget turmoil projected for 2009-10 and that the probable need for College Based Fee would be for classes. This is particularly evident in the Biological Sciences Department that assumed most of their fee generation would be used for classes and thus proposed only a few alternative uses. The Liberal Studies Committee submitted a proposal focused on access to classes with a Liberal Studies prefix with some additional ideas but no specified amounts. The School of Education, anticipating serious budget issues, did not submit a proposal and probably is considering that their generated funds would go to classes as well. The other departments submitted more traditional proposals with some funds designated for classes (Kinesiology, Mathematics, and Physics) and others without proposals for direct access to classes but realizing funds would be so designated.(Chemistry and Statistics). All of the approaches were thoughtful.

<u>CSM CBF 2009-10 Proposals</u>	<u>Requested</u>
Biological Sciences Department:	\$100,000
Department of Chemistry and Biochemistry:	\$172,000
Kinesiology Department:	\$427,000
Liberal Studies Department	\$213,000
Mathematics Department:	\$160,000
Physics Department:	\$198,000
Statistics Department:	\$ 21,000
School of Education	\$ 0
Total:	\$1,291,000

In addition, I submitted a proposal to establish a student committee to serve as advisory to the dean on budget and related matters and as the *College* College Based Fee Committee.

Final Decisions and Allocations of College Based Fee Funds

The allocations below are subject to change depending on changes in the California economy and budget of the California State University. If further deterioration is experienced, whatever is left of the following funds (that are almost exclusively focused on student research) might be redirected for access to classes. If a miraculous recovery occurred, I will be glad to start the process over and distribute College Based Fee in proportions more consistent with the original purposes.

CSM CBF 2009-10 Allocations

These allocations are for the purposes described. Almost all are related to student research.

ALLOCATIONS OTHER THAN FOR ACCESS TO CLASSES

Biological Sciences Department:

\$ 70,000

Support of student research including related items such as grader support, and plant and animal collection assistants. The 20K requested for startup is being covered centrally out of the state allocated budget.

Department of Chemistry and Biochemistry:

\$ 63,000

For summer research stipends or research related research support.

Kinesiology Department:

\$140,000

\$40,000 for on-going research projects (WHAM, FLASH, Focus Groups, Pink and Dude Chefs) and \$100,000 for COPE. Startup money for new faculty members and office support for COPE is covered centrally.

Liberal Studies Department:

\$ 30,000

The bulk of the proposal was for LS classes and will be covered as completely as possible with the Lecturer funds generated from the state budget and CBF as indicated in the College budget spreadsheet. \$30,000 is allocated to begin bringing more opportunities for science related senior projects and student research in teaching and learning.

Mathematics Department:

\$ 45,000

Summer research and student travel.

Physics Department:

\$ 48,000

Student research and travel. Startup for new faculty members will be covered centrally.

Statistics Department:

\$ 6,000

Student research and travel. We will fund the team teaching of the capstone course from central funds if at all possible.

School of Education

\$ 5,000

No proposal was submitted in consideration that the funds would have to be used for access to classes.

Center for Science and Mathematics Instrumentation

\$ 0

November 12, 2008 Addendum to the 2008-09 CBF decisions: The 2008-09 College Based Fee Committee agreed to commit \$400K per year during 2007-12 to be used in ways to support construction/equipping of the Center for Science and Mathematics, if necessary. This will not be necessary this year and is not currently anticipated to be necessary in the future.

Sub-Total:

\$ 407,000

Approximate Funds for Access to Classes:

\$1,593,000

This CBF resource will be combined with regular state money available for Lecturers to fund classes and laboratories. Department chairs have presented their Lecturer projections and the total funds will be distributed to accommodate the priority needs of students in obtaining needed classes and progressing to degrees.

Total

\$2,000,000

Formation of College Student Advisory Committee to the Dean on Budget and Related Matters including College Based Fee.

The College Based Fee Committee in its meeting on May 12, 2009 gave preliminary approval to the limited use of College Based Fees for student research during 2009-10 and for the formation of a student advisory committee to the dean of on budget and related matters including College Based Fees. This committee is approved and will be constituted this coming fall quarter and likewise in subsequent years.

Membership:

Normally up to two students from each school or department and two from student council. Representation considerations include size of department, complexity, and graduate and undergraduate programs.

Responsibilities include:

- Committee formation early each fall quarter.
- Meeting with the dean and designees to become expert CSU, University, and College budget, resources and enrollment matters.
- Acting as a student advisory committee to the dean on budget, resources, and other College and University matters.
- Making recommendations to the dean on plans and allocations of College Based Fee based on department and school proposals.
- Monitoring the College Based Fee expenditures and advising on major proposed changes to approved plans.
- Other related issues of interest to the College of Science and Mathematics and Cal Poly.

Considerations in Expenditure of Fee Revenues

- 1. Departmental Autonomy:** The departments will receive a dollar allocation and are authorized to spend it consistent with the intent of their proposals. They can re-prioritize or change aspects of the proposal with appropriate internal consultation.
- 2. Appropriate Consultation:** Each department should determine the extent of consultation required in implementation of the proposal. I would assume that minor deviations will be allowed the department chair without consultation, but major deviations, such as substitution of an expensive piece of equipment for another or a major change in priorities, will be subject to consultation with the department College-Based Fee committee. Complete departure from a proposed program should be discussed with the dean who may consult with the College Student Advisory Committee.
- 3. Immediate but Phased Expenditures:** It is important that students recognize benefits of the College Based Fee as soon as possible each year.
- 4. Expenditures to Benefit College of Science and Mathematics Majors:** The College-Based Fee is paid by and should primarily benefit students majoring in the College of Science and Mathematics. Because of the nature of the College, this is not completely possible but it is important that the departmental expenditures be directed for maximum benefit to our majors.
- 5. Efficiency and Value in All Expenditures:** In both our college-based fee revenues and our state budget, we should strive to achieve value and efficiency in our expenditures.

2009-10 College- Based Fee Procedures and Timetables

- **Summer 2009**
 - Tuesday, June 2: 2009-10 College-Based Fee allocations finalized, if possible.
- **Fall 2009:**
 - Early in fall quarter, formation of the College Student Advisory Committee. Before the end of fall quarter, training and education of the Committee on budget, resources, enrollment and other related matters pertaining to the CSU, Cal Poly, and the College of Science and Mathematics.
 - Begin forming department and school College Based Fee Committees.
- **Winter 2010:**
 - Department and school committees consult with students, faculty, and staff about needs and priorities for use of College Based Fee revenues in 2010-11. Proposal development.
- **Spring 2010:**
 - Monday, May 3: Department and School CBF proposals due to the dean's office as well as names of student representatives who will present the proposals.
 - Tuesday, May 11: College CBF Committee meets. Departments and schools present proposals. Dean consults with College Committee, department/school presenters and faculty advisors.
 - Tuesday, May 18 (Probable): Dean presents proposal for distribution of CBF revenues to the College CBF Committee.
 - Tuesday, June 1: 2010-11 CBF allocations finalized.

Addendum Concerning the 2009-10 Budget

California is facing an exceedingly challenging budget situation for 2009-10. The California State University and Cal Poly are likely to be heavily impacted. As a consequence, it is likely that difficult actions will have to occur during the summer and fall in response to anticipated budget cuts.

Estimated (but unofficial) budget cuts to Cal Poly could be as high as \$24M. This could translate to negative bottom lines for the College of Science and Mathematics' budget draft of June 2, 2009 of up to \$4.7M. To put this in perspective, the CSM 2009-10 budget projects \$5.3M for full-time and part-time Lecturers (temporary faculty members). Losing the Lecturers translates into canceling hundreds of lecture and lab sections.

This proposal for College Based Fee expenditures could be drastically modified in the coming weeks as a result of the deteriorating economic situation in California and possible additional budget cuts.