**SFAC 2008-09 Continuity Report**

**Summary**

At the start of the school year, SFAC believed we would be able to allocate permanent funding for the first time in several years. In prior years, the committee either had only temporary one-time funding available to allocate or no funding at all.  In the fall quarter, we had not yet become aware of the full impact of the economic crisis on state tax revenues and on the university budget. With this in mind, we decided to conduct reviews of all Registration Fee-funded units.  We planned to draft a questionnaire, distribute it to all relevant organizations reviewing Registration Fees and then use the information to move forward with a call letter for permanent funding in winter and spring quarter.

The outlook changed in winter and spring quarter as the state’s dire fiscal situation became clearer.  This climate affected SFAC’s work throughout the year as we shifted funding priorities to temporary one-time needs and covering the increase in UCRP contributions from April-June 2010 and OMP/utilities costs. Below is a more detailed summary of the major projects and ongoing recommendations for 2009-10 SFAC.

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**Unit Review Subcommittee**

Mid-Fall quarter the committee began initial discussions on a unit review questionnaire survey to help us assess need at a time of forecasted limited funds.  A sub-committee was created chaired by the Vice Chair, another graduate student, two undergraduate representatives, and administrative/staff representative.  The committee was tasked with created a questionnaire that would survey units on the following:

*Student Services*: In this section we asked for a brief one paragraph statement of unit’s mission.  We followed by asking for unit’s top 3-5 long-term student service goals related to existing projects or potential expansion of programs and services.  Finally, we asked about unit’s main services and products and how they deliver these services and products to students.  We also requested brochures and other documents that describe services.

*Population served by unit:* We asked for any information on population served by unit (head count) for the past three years (2005-06; 2006-07; 2007-08) for students (undergrad and grad respectively), staff, faculty, and other. We further asked for any additional information broken down by male/female, race/ethnicity, and any other demographics that they may have.  If none was collected, we asked for usage patterns in lieu of specific usage date.

*Budgeted FTE (Sub-01 and 02):* In this section we asked for C-Big Fund group, # of FTE, and brief description  of job duties/comments for each position.  In lieu of this some units provided a departmental flow chart.

*Student Staff:* Here we again asked for figures from C-BIG Fund Group, total annual student hours budgeted, and total annual student wages in budget, as well as brief description of job responsibilities and comments.

The final question for two sections above asked unit’s to please describe how unit was using funds from each fund category during the current budget year.  We further asked to discuss any significant changes in allocations/revenue for each fund group within the past five years.

*Fiscal Impacts:* Here we asked unit’s to please discuss how unit was dealing with recent decentralization of benefits and recharges from OMP/utility shortfalls as well as how unit will be affected by potential re-starting of pension contributions and additional reductions as well as additional financial challenges to maintain current level of services and programming.

*Planning and Assessment:* In this final section we asked for units to describe strategic planning process and student oversight and advisory in that process.  We continued by asking units to describe student assessment mechanisms currently in place (i.e. feedback forms, surveys, etc; The committee further asked for resources used in planning and budget process. The final two questions of our questionnaire were around technology and the used of it to deliver services more effectively and mechanisms for publicizing services to students.

After months of sub-committee meetings, we brought our draft to full committee. There it went through discussion and final revisions.  The final questionnaire was concise and praised for clarity of targeting information that would help committee come spring and deliberations for priority and need.  The final document was sent out to Vice Chancellors and Deans accompanied by a cover letter from the chair explaining why we were conducting such a survey and coincided with early Winter call-letter. It was in accord with previous efforts from previous committees (Services Assessment Team 2002-2003; Budget Impact Review Teams 2003-2005; and Comprehensive Unit Assessment 2005-2006.  Please see SFAC Advisor Marilyn Alkin for earlier versions).

At final discussion before final approval from SFAC, members shared that it was one of the best documents SFAC had created for this purpose.  The 2008-09 Unit Review Questionnaire proved to be very informative, resourceful, and helpful to committee members to better understand scope of services and of the units that provide them to assess need at a time of limited funding.

**Temporary funding deliberations and allocations**

At the end of winter quarter SFAC sent out a call letter for temporary funding proposals (refer to call letter). In the letter, we specifically stated that given the temporary nature of these funds, we would be unable to fund staff salaries or benefits.  However, given the changes to the benefits contribution, we assured units that we would consider funding such requests as a benefits shortfall in spring 2010 would be a one-time temporary use of funds. Other funding priorities included: the department cannot meet this need through other viable funding sources; funds will be used in 2009-10; and if SFAC can only fund a portion of the request, the unit will be able to cope with partial funding or match through another source.

We received 21 proposals for temporary funding requests.  Before deliberations, I reviewed each proposal and drafted a matrix with categories (e.g., OMP/utilities, UCRP contribution, programming/services, computers, supplies, etc). Next, the committee funded all requests for our first priority in funding, estimated UCRP contributions for April-June 2010 and OMP/utilities. We then reviewed each proposal and determined whether or not a request was one-time need or would need ongoing funding. If we had additional questions about particular requests, we contacted the director of the unit. During the course of deliberations, we also learned that undergraduates were voting on the PLEDGE referendum which would affect four registration fee-funded units. We probed these units about PLEDGE and how it would affect their requests for temporary funding.  PLEDGE was considered in funding requests for the affected units.

For the most part, if the request met our criteria, it was funded. There were exceptions when we felt that the requested item was unnecessary. The Marching Band proved difficult for the committee due to the nature in which the request was written. We decided not to fund the travel and meal expenses for games and for band camp due to our concerns that this is an ongoing need. We hoped that the additional revenue generated from the PLEDGE referendum will help alleviate the Marching Band’s fiscal situation. At the recommendation of the committee, the chair and vice-chair met with Associate Vice Chancellor Glyn Davies to discuss our problems with the request from Marching Band. We urged AVC Davies to meet with band director Gordon Henderson to suggest changes.

The request from Student Legal Services also proved difficult as they requested $11,336 to fund the legal secretary’s vacation time buyout when she retires. Although we recognized the great need to fund the legal secretary’s vacation time, we could not fund this.  We decided to defer this request to be reconsidered when the legal secretary decides to retire. I encourage future SFAC committees to stay apprised to SLgS situation.

Chancellor Block approved the committee’s funding recommendations.

For more details on temporary funding, refer to the call letter, recommendation letter (dated June 9) and attached document with detailed SFAC 2009-10 temporary funding recommendations.

**Project Review Group**

At the start of fall quarter, two SFAC members (a graduate and undergraduate) volunteered for the Project Review Group. Both members attended an initial meeting to become acquainted with the committee’s charge and the projects under consideration.  Unfortunately, due to a resignation and travel schedule, the original members were unable to fulfill their commitment.

Nevertheless, the chair and another member attended the PRG meeting.  During the meeting, the committee reviewed the 11 projects listed as top priorities, which included scheduled maintenance and necessary improvements to ensure student safety. The PRG unanimously approved the 11 projects.  SFAC recommended approval of the 11 projects to Chancellor Block.

**Course Materials Fee Requests**

The committee reviewed twenty applications to establish or increase course materials fees over the course of the academic year. This was an unusually large number considering that in the previous year the committee only saw 2 or 3 such applications. Three of the applications affected graduate or professional students. Seventeen of the applications affected undergraduate majors in life science, physical science and engineering. Although SFAC recommended establishing or increasing the fee, we were very concerned that these fees would unfairly place a burden on science and engineering majors. Unlike student user fees, course materials fees are mandatory.  Students must pay the fee in order to complete the class and ultimately graduate.  We found it unfair that the cost of education for a Biochemistry student could be much higher than for an English major.  Most of all, we are concerned that the additional fees could deter financially needy students from pursuing majors in science or engineering.

This issue should be studied more closely, especially if more science and engineering departments propose establishing or increasing course materials fees.

**Student Service Compensation Policy Subcommittee**

During spring quarter, the compensation policy subcommittee reviewed the SFAC Student Service Compensation Policy. During our review, we consulted with the chairpersons of the committees included in the policy. We were concerned about the increased workload for some of the committees, especially given that the compensation level had remained steady since 2004. The SFAC recommended that 2009-10 SFAC review the compensation issue more closely. We also recommended minor changes for clarity to the policy. These recommendations were approved by Chancellor Block. (Refer to *compensation policy letter* dated June 8, 2008 and Chancellor Block’s letter to SFAC dated June 26, 2009.)

Student User Fee Report

In spring 2008, SFAC recommended a change to the Student User Fee policy. We recommended establishing a waiver for a small number of services we deemed essential to student health and wellness. This recommendation was not adopted, but we hope that in the future this could be reconsidered especially as the University seeks to institutionalize services for nontraditional students through the reorganization of the former Center for Women and Men.

SFAC reviewed the Student User Fee Report drafted by the Office of Academic Planning and Budget. Although the report included all types of user fees, SFAC concentrated its focus on user fees from Registration Fee funded units (e.g., Student Legal Services, Career Center, Ashe Center, Ashe Optometry Services, and Counseling and Psychological Services). We found the report both thorough and helpful in understanding how user fees contribute to departmental revenue. We recognize the need for user fees to maintain high quality services for students. However, we are concerned with the assertion that the user fees do not present a deterrent to using a particular service. SFAC believes that imposing a fee on any service will deter some students. For instance, after establishing and increasing fees, Student Legal Services’ client numbers decreased.

SFAC should continue to ensure that user fees continue to be low, especially as student services across campus seek ways to make up lost 19900 funding.  User fees should not be a barrier to services.

**Temporary Ongoing Funding Subcommittee**

The temporary ongoing funding subcommittee devised a short set of questions for the few units receiving this type of funding. These units and programs are: Center for Student Programming/Fraternity and Sorority Relations (ASUCLA maintenance and utilities); Student Development Health Education (HIV/AIDS education); Early Childcare and Education (student subsidy); Graduate Division (new graduate student reception); and Graduate Student Resource Center (new graduate student orientation).

The subcommittee’s goal was to assess if the amount of funding – sometimes established many years ago – was enough to meet the unit’s needs.

In the recommendation letter to Chancellor Block (dated June 8), SFAC recommended reclassifying the funding for the following units from “temporary ongoing” to permanent:

$37,500           Graduate Division – new student receptions

$12,500           Graduate Student Resource Center – new graduate student orientation

$65,000           Student Development Health Education – HIV/AIDS Education

We felt that the change in classification – approved by Chancellor Block – would improve planning for these programs.  In addition to the reclassification, the committee recommended continuing “temporary ongoing” funding of approximately $50,000 per year for CSP/FSR space maintenance and $130,000 for Early Childcare and Education student subsidy.

**Additional Recommendations**

* Get information from Office of Academic Planning and Budget early on about the increasing costs for benefits (retirement and health care) and OMP/utilities. Make sure you get frequent updates. The committee sometimes felt that these costs were like Ms Pac Man eating through our funding. We worried that this would affect programming, especially in the largest organization receiving registration fees, Student Affairs.
* Make sure the committee is aware of the Student Mental Health funding priorities (e.g., Tier I and Tier II) and the current status funding for this area. In 2007 and 2008, the UC Regents earmarked a portion of the registration fee increase specifically for student mental health. In 2009, there was no earmark.
* Maintain good communication and a strong working relationship with the Vice Chancellor for Student Affairs, Janina Montero and CAO Monroe Gorden.
* Continue to advocate that SFAC keep office space in the Murphy Hall ADA/504 Compliance Office.
* Make sure to establish timelines for any large projects (e.g., funding or unit reviews)
* Ensure that PRG appointees *will* be able to make the meeting early in winter quarter.