



**2022/23 ANNUAL  
BUDGET REPORT**

# FOREWORD

## Purpose and Scope of this Document

This document is a presentation of San José State University's (SJSU's) planned budget for the fiscal year 2022/23 to serve as a reference for the campus community and other interested parties. The university budgets are addressed in varying detail, but the main focus of this document is SJSU's Operating Budget. The Operating Budget has two main funding sources: General Fund support from the State of California that is distributed by the California State University (CSU) Chancellor's Office to the campus, and student tuition and fees collected by the campus.

Budget presentations in this document are primarily focused on the current fiscal year from an overall University perspective. Financial and budget information relating to specific Divisions, Colleges, Schools, Service Groups, Departments, and/or Programs may be obtained by contacting the appropriate Vice President's office for assistance.

## Distribution of this Document

This document is available online at  
<https://www.sjsu.edu/fabs/services/transparency/annual-reports>

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# University Resource Summaries

Budget Calendar

Highlights and Facts: 2022/23 Operating Budget

Operating Budget Comparison: 2021/22 vs. 2022/23

2022/23 Operating Budget Resources

2022/23 Operating Budget Sources and Uses

2022/23 Expenditure Budget by University Division

Comparison of CSU Campus Expenditures

# BUDGET CALENDAR

The university engages in financial planning and budget development throughout the fiscal year, across varying planning horizons. For the annual Operating Budget, the planning cycles and decisions of three primary bodies influence the timeline and amounts: the State of California, the California State University and the Board of Trustees, and the university campus. Below is a general description of the planning cycles and a graphical display of the calendar.

## *State of California*

Each year by January 10, the Governor of the State of California submits the Governor’s Budget and Budget Bill to the Legislature for consideration. The budget reflects the goals and objectives of the Administration for the forthcoming fiscal year, which begins in July. Over the following months, Legislative Budget Subcommittees hold budget hearings, the Legislative Analyst Office (LAO) prepares an analysis of the Budget Bill, and other considerations and funding needs are discussed and examined. In May, the proposed Governor’s Budget is updated as the “May Revision” to reflect changes in revenues, expenditures, and reserve estimates based on the latest economic forecast. The final approved State Budget Bill is adopted by the Constitutional deadline of June 15 of each year. Detailed information on the California Budget is available on the State Budget website.<sup>1</sup> A more detailed State allocation timeline can be found from the Department of Finance timetable webpage.<sup>2</sup>

## *California State University*

The California State University Office of the Chancellor prepares an annual Operating Budget request to the State for review and approval by the Board of Trustees, which has historically been scheduled for discussion at the November Board meeting. The annual CSU Operating Budget request is published online with supporting documentation and may be viewed from the CSU Budget website.<sup>3</sup> When the Governor’s Budget is published in early January, the CSU issues a preliminary campus budget allocation in a coded memo with the campus-level estimated allocations. After the State enacts the Budget, final budget allocations are provided to campuses in late summer. Subsequent budget allocations are issued for other one-time funding or for specific programs.

## *University*

Though the university budgets on a fiscal year (July 1 – June 30) and is dependent on the State and CSU budget cycles, budget development at San José State University is an ongoing, multi-year process that is aligned with the strategic planning of our campus. University goals, and the processes involved in reaching those goals, influence the distribution of campus resources. Throughout the year, the President’s Cabinet is kept informed of the State and CSU budget progress and the potential impacts on the campus Operating Budget. In light of the final budget allocation from the CSU and other local fiscal impacts, such as cost increases and priorities, the annual Operating Budget is updated and discussed with the President’s Cabinet. Funding commitments

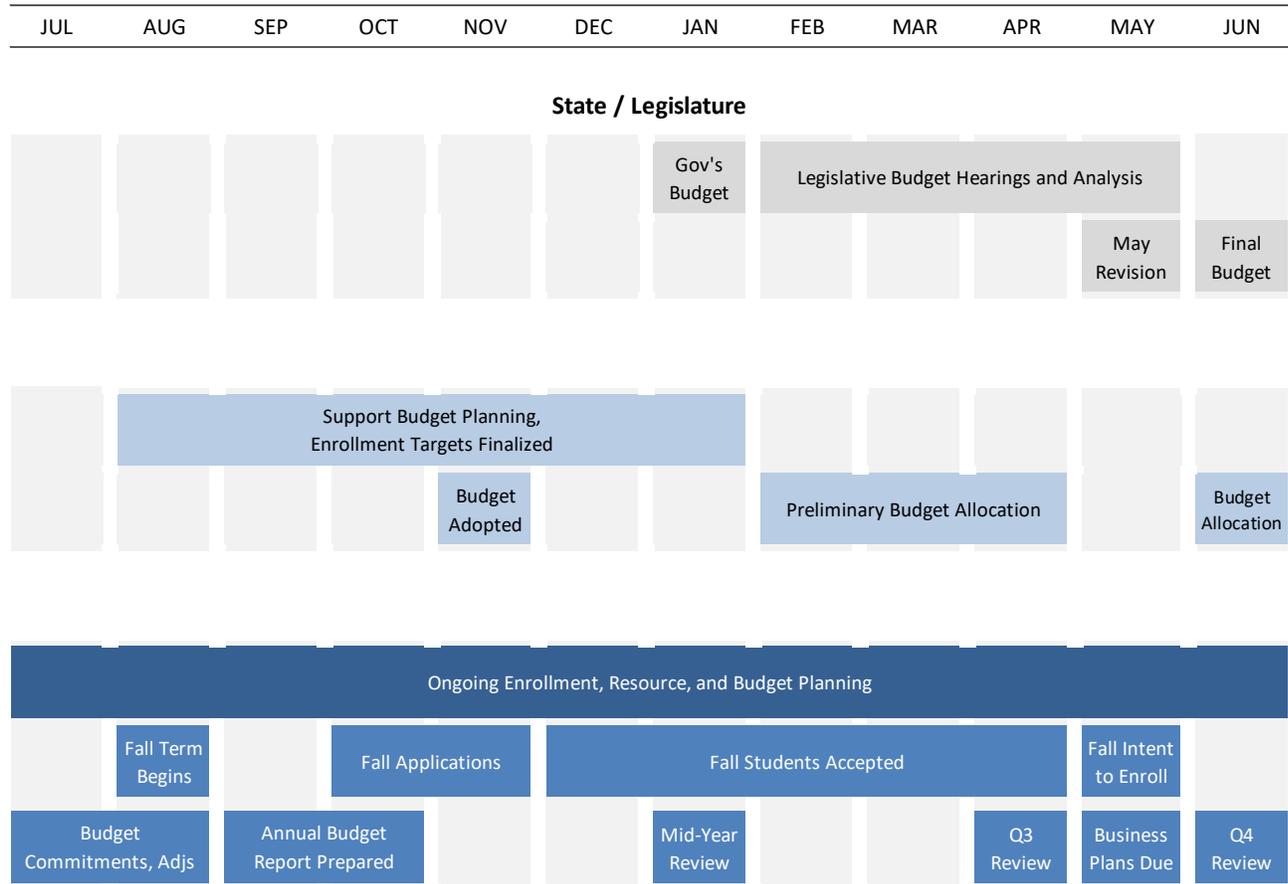
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<sup>1</sup> <https://www.ebudget.ca.gov/>

<sup>2</sup> <https://dof.ca.gov/budget/budget-calendars/>

<sup>3</sup> <https://www.calstate.edu/csu-system/about-the-csu/budget>

and adjustments are then distributed to Divisions. The resulting Operating Budget and report on other ancillary and self-support fund budgets is presented in the document that follows.



## HIGHLIGHTS AND FACTS: 2022/23 OPERATING BUDGET

Over the last several years, higher education and San José State University have managed through a number of significant operational and budgetary challenges. At the start of 2020/21 as the outbreak of COVID-19 threatened in-person instruction and campus life, the State also suffered through significant revenue declines and faced potential furloughs. The campus planned its way out of a significant budget gap of \$92 million, relying on federal support established by the CARES Act, campus reserves, and moderated spending plans. The campus successfully executed on a plan that avoided layoffs and prevented severe budget cuts, and allowed for continued progress towards campus priorities including ongoing tenured and tenure-track hiring and research. As 2021/22 approached, the State was able to restore the funding cuts that it had implemented in the prior year, and funding from federal grants continued to support pandemic-related response needs and direct revenue losses and supplement the use of campus reserves.

Entering into the planning cycle for 2022/23, as the economy was rebounding, the Governor's Budget released in January reflected a notable ongoing investment in higher education and the CSU – an ongoing increase of 5% or \$211 million towards CSU operating costs, a 2.5% increase in funded enrollment (equivalent to 9,434 full-time resident students), and \$12 million for foster youth support. The budget outlined a multi-year compact and pathway to grow CSU base funding each year from 2022/23 through 2026/27, with a plan to increase the state General Fund appropriation by at least five percent each year in return for the CSU to meet student-centric goals including expanding enrollment, student success and equity, affordability, and supporting workforce preparedness. The May Revision maintained the ongoing level of General Fund support for the CSU that was outlined in January, and expanded to include one-time revenues of \$174 million towards facilities and campus-specific programs. Reports of increased tax receipts and record revenues fueled by investment returns led many analysts and many within the CSU to anticipate a further expansion of funding in the 2022/23 final budget.

### *Base Funding*

At the end of June, Governor Newsom and the Legislature finalized the State of California's \$300 billion spending plan for 2022/23. The 2022/23 California State Budget allocated \$365 million in ongoing General Funds to the California State University. The incremental funding included:

- \$211 million of unallocated operating funds (compensation and mandatory costs included);
- \$81 million for resident enrollment growth of 9,434 full-time equivalent students;
- \$35 million for Graduation Initiative 2025;
- \$10 million for student basic needs; and
- \$28 million to support foster youth, Project Rebound and other programs.

A summary of the base funding allocated to San José can be reviewed in the following adjustment tables.

### One-Time Funding

The CSU also received \$1.1 billion in one-time funding primarily for deferred maintenance, infrastructure, and housing projects at select campuses, and funding towards legislative priorities. San José was the recipient of several one-time state funding allocations:

- Wildfire Interdisciplinary Research Center: \$5,000,000;
- Moss Landing Marine Lab Dock: \$3,000,000; and
- Speed City Legacy Project: \$9,000,000.

### Budgeted Enrollment

Prior to the pandemic, the university enrollment plan for 2020/21 was 27,705 full-time equivalent students (FTES), which was then revised downwards to 26,500 FTES to address an anticipated decline in non-resident FTES, including a projected loss of 500 international students. For 2021/22, the SJSU enrollment plan totaled 27,840 FTES, 25,716 base-budgeted plus an additional 2,124 “surplus” budgeted FTES. While the campus had anticipated a rebound in enrollment for last year, actual student enrollment fell short. Total enrollment, as further discussed in a later section, fell slightly year-over-year to 27,276 FTES, 564 FTES below the overall budgeted level.

For 2022/23, the campus enrollment plan set course for 27,690 FTES (32,467 headcount students). As indicated above, the State provided funding to increase CSU enrollment by 9,434 FTES; the campus was allotted an increase of 575 FTES. As the campus had historically been over the funded target, the increase in funded FTES essentially moved 575 resident FTES from surplus-budgeted (funded with tuition fees only) to base-budgeted FTES (supported with General Fund and tuition fees). In light of the enrollment headwinds starting in 2021/22, the non-resident base budget for 2,400 FTES was not further adjusted upwards. The incremental 1,399 surplus FTES are reported as resident surplus, to prevent overstating the budget for non-resident tuition fees.

The budgeted enrollment plan for 2022/23 is summarized below.

	2021/22 Budget			2022/23 Budget			Change		
	Base	Surplus	Total	Base	Surplus	Total	Base	Surplus	Total
Resident FTES	23,316	2,094	25,410	23,891	1,399	25,290	575	(695)	(120)
Non-resident FTES	2,400	30	2,430	2,400	-	2,400	-	(30)	(30)
<b>Total FTES</b>	<b>25,716</b>	<b>2,124</b>	<b>27,840</b>	<b>26,291</b>	<b>1,399</b>	<b>27,690</b>	<b>575</b>	<b>(725)</b>	<b>(150)</b>

### Base Budget Deficit

Since 2018/19, the campus has undergone a transformational and strategic change in the approach to budgeting. The campus has made far-reaching investments in student success initiatives and expansion of courses, faculty hiring and start-up packages, research to the benefit the entire campus community, and has established and grown foundational and critical units on campus including the Divisions of Research and Innovation, Information Technology, College of Graduate Studies and funding key areas such as Title IX, Clery, Community/Government Relations.

These investments were made by leveraging ongoing surplus enrollment revenues, annual salary savings, reserves, and other one-time funding streams. Expansion in enrollment was anticipated to continue to grow, as was General Fund support, along with full funding for costs.

As slowing and declining enrollment trends are now emerging, the campus is evaluating the future levels of surplus enrollment and the pace of future growth in the state-side programs. And despite significant State commitments, the CSU was not able to completely fund the anticipated cost increases attributable to the successful collective bargaining unit negotiations from the General Fund support from the State. The CSU budget allocation to the campuses anticipated that all campuses would be required to self-fund a portion of the ongoing, base compensation costs of approximately 12%, which the Chancellor's Office estimated would total \$5.0 million in ongoing costs and an additional \$3.8 million in one-time costs for San José. These compensation related costs were in addition to the significant inflationary cost increases at the campus level, and ongoing commitments brought on by the pandemic, such as video conferencing licenses, for example.

At this time, the campus is taking a prudent review on relying on one-time revenues in support of ongoing activities and backfilling the current base deficit. Investments will continue to be made to ensure that the campus still moves towards the goals and vision of Transformation 2030 and that students are well supported in their academic journey and collegiate experience at San José. Over the course of the year ahead, Cabinet and Divisions will be reviewing potential new revenue streams, increasing enrollment strategies and the budget constraints of the campus, and then develop a plan for healthy growth along a more sustainable growth path. For the immediate year 2022/23, all Divisions were asked to return 5% of their operating expense (non-salary) budget back to the central university budget. Anticipated salary savings from position vacancies continue to be budgeted, as has been the case since 2018, with the non-faculty staff and management savings budget distributed in part down to the Division levels.

Following are tables outlining the 2022/23 Operating Budget changes from year-to-year as well as a listing of ongoing Operating Budget resources and funding commitments. The Operating Budget Sources and Uses table details the distribution of the funding across the campus in support of priorities and budgetary needs.

## OPERATING BUDGET COMPARISON: 2021/22 VS. 2022/23

	2021/22 Budget	2022/23 Budget	Adjustment	
<b>Base Operating Budget</b>				
General Fund Appropriation	\$193,186,000	\$221,068,000	\$27,882,000	16.1%
Revenues <sup>(a, b)</sup>	\$211,987,307	\$211,281,986	(\$705,321)	-0.3%
	<b>\$405,173,307</b>	<b>\$432,349,986</b>	<b>\$27,176,679</b>	<b>7.1%</b>
<b>Budgeted FTES</b>				
CSU Resident FTES Allocation	23,316	23,891	575	2.5%
Non-Resident FTES (campus target)	2,400	2,400	0	0.0%
	<b>25,716</b>	<b>26,291</b>	<b>575</b>	<b>2.3%</b>
<b>Detail of Budget Adjustments</b>				
Adjustments to the General Fund Appropriation				
Prior Year Retirement Adjustment		(\$304,000)		
Prior Year Compensation Adjustment		\$8,554,000		
Employer Paid Health Premiums		\$909,000		
Operations and Maint of New Facilities		\$176,000		
Compensation Adjustment		\$12,531,000		
Enrollment Growth		\$4,941,000		
Support for Foster Youth		\$712,000		
State University Grant Redistribution		\$363,000		
			<b>\$27,882,000</b>	
<b>Adjustments to Revenues</b>				
Adjustments to Revenues per Systemwide				
Tuition from Enrollment Growth		\$2,974,000		
Campus Budget Adjustments <sup>(c)</sup>				
Tuition Fee Adjustment		\$1,996,050		
Non-Resident Tuition Fee Adjustment		\$472,000		
Remove Ongoing Surplus Tuition from Base		(\$7,436,000)		
Cost Recovery Revenue Adjustment		\$1,288,629		
			<b>(\$705,321)</b>	
			<b>\$27,176,679</b>	

**Footnotes:**

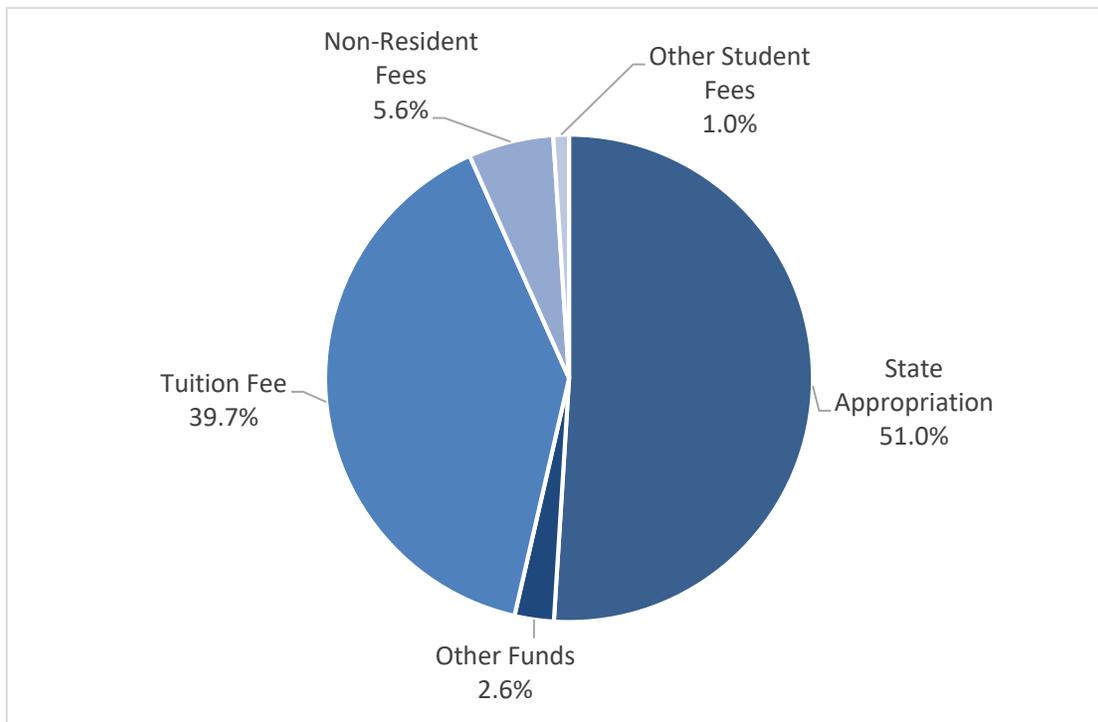
<sup>(a)</sup> In 2020/21 and 2021/22, the Operating Budget included surplus tuition fee revenues as a recurring resource. The 2022/23 report displays base-budgeted tuition only.

<sup>(b)</sup> See next page for a breakdown of Resources. Next page also includes Federal Work Study as a Resource.

<sup>(c)</sup> The Campus has historically reported Campus Budget Adjustments which represented the differences between campus-calculated fee revenues versus fee revenues calculated by the Chancellor's Office. The differences were primarily due to variations in student mix and student average unit load.

## 2022/23 OPERATING BUDGET RESOURCES

<b>State Appropriation</b>	<b>\$221,068,000</b>	<b>51.0%</b>
<b>Tuition Fees</b>		
Tuition Fees	\$170,210,000	
Campus Adjustment to Tuition Fees	<u>\$1,996,050</u>	
	<b>\$172,206,050</b>	<b>39.7%</b>
<b>Non-Resident Fees</b>		
Non-Resident Fees	\$24,008,000	
Campus Adjustment to Non-Resident Fees	<u>\$472,000</u>	
	<b>\$24,480,000</b>	<b>5.6%</b>
<b>Other Student Fees</b>		
Application Fee	\$2,867,000	
Diploma/Commencement Fee	\$336,000	
Transcript Fee	\$515,000	
Other Student Fees	<u>\$782,000</u>	
	<b>\$4,500,000</b>	<b>1.0%</b>
<b>Other Resources</b>		
Campus Work Study Program	\$1,170,000	
Cost Recovery from Other Funds	<u>\$10,095,936</u>	
	<b>\$11,265,936</b>	<b>2.6%</b>
<b>Total Operating Budget Resources</b>	<b><u>\$433,519,986</u></b>	<b>100.0%</b>



## 2022/23 OPERATING BUDGET SOURCES AND USES

	Ongoing	One-Time	Total
<b>Sources of Funds</b>			
General Fund Appropriation	\$27,882,000	\$2,804,000	\$30,686,000
Campus Tuition and Fee Adjustments	\$5,442,050	\$9,163,450	\$14,605,500
Cost Recovery Revenues	\$1,288,629		\$1,288,629
Higher Education Emergency Relief Fund (HEERF)		\$1,250,000	\$1,250,000
Campus Reserves and Prior Year Allocations	\$4,009,247	\$3,000,000	\$7,009,247
Revise Funding and Timing of Capital Projects		\$2,587,000	\$2,587,000
Funding Carried Forward		\$23,597,991	\$23,597,991
<b>Total Sources</b>	<b>\$38,621,926</b>	<b>\$42,402,441</b>	<b>\$81,024,366</b>
<b>Planned Uses of Funds</b>			
<b>Mandatory Costs/Existing Commitments</b>			
Employee Compensation	\$25,977,616	\$4,025,889	\$30,003,504
Health & Dental Premiums Adjustment	\$909,000		\$909,000
Retirement Adjustments	\$1,446,000		\$1,446,000
State University Grants Adjustment	\$363,000		\$363,000
Contractual Costs and Premiums	\$1,699,979		\$1,699,979
	<b>\$30,395,595</b>	<b>\$4,025,889</b>	<b>\$34,421,483</b>
<b>Approved Division Requests and Priorities</b>			
<u>Academic Affairs</u>			
Enrollment Support <sup>(a)</sup>	\$4,128,960	\$5,515,418	\$9,644,378
Research, Scholarly & Creative Activity (RSCA)			
Assigned Time		\$2,000,000	\$2,000,000
Faculty Recruitment & Startup		\$1,900,000	\$1,900,000
Student Assistants		\$4,000,000	\$4,000,000
Division Salary Savings, OE&E Reduction		(\$2,758,997)	(\$2,758,997)
	<b>\$4,128,960</b>	<b>\$10,656,421</b>	<b>\$14,785,381</b>
<u>Administration &amp; Finance</u>			
Maintenance & Operations of ISB	\$1,919,498		\$1,919,498
Release Annual Deferred Maintenance Funding		(\$2,000,000)	(\$2,000,000)
Division Salary Savings, OE&E Reduction		(\$3,024,027)	(\$3,024,027)
	<b>\$1,919,498</b>	<b>(\$5,024,027)</b>	<b>(\$3,104,529)</b>
<u>Information Technology</u>			
Division Salary Savings, OE&E Reduction		(\$1,298,040)	(\$1,298,040)
	<b>\$0</b>	<b>(\$1,298,040)</b>	<b>(\$1,298,040)</b>

	Ongoing	One-Time	Total
<u>Institutional Affairs</u>			
Title IX Positions <sup>(b)</sup>	\$74,000		\$74,000
Strategic Communications <sup>(b)</sup>	\$159,100		\$159,100
Employee Accommodations Resource Center		\$50,000	\$50,000
Division Salary Savings, OE&E Reduction		(\$1,269,894)	(\$1,269,894)
	<b>\$233,100</b>	<b>(\$1,219,894)</b>	<b>(\$986,794)</b>
<u>Intercollegiate Athletics</u>			
Compensation Commitment	\$148,000		\$148,000
Sports Medicine Chaperones <sup>(b)</sup>	\$147,000		\$147,000
Division Salary Savings, OE&E Reduction		(\$400,223)	(\$400,223)
	<b>\$295,000</b>	<b>(\$400,223)</b>	<b>(\$105,223)</b>
<u>Office of the President</u>			
Division Salary Savings, OE&E Reduction		(\$45,233)	(\$45,233)
	<b>\$0</b>	<b>(\$45,233)</b>	<b>(\$45,233)</b>
<u>Research and Innovation</u>			
Division Salary Savings, OE&E Reduction		(\$342,818)	(\$342,818)
	<b>\$0</b>	<b>(\$342,818)</b>	<b>(\$342,818)</b>
<u>Student Affairs</u>			
Foster Youth	\$712,000		\$712,000
Basic Needs		\$479,000	\$479,000
Division Salary Savings, OE&E Reduction		(\$1,099,013)	(\$1,099,013)
	<b>\$712,000</b>	<b>(\$620,013)</b>	<b>\$91,987</b>
<u>University-Wide &amp; Cross-Division Commitments</u>			
Tower Projects (5 years)		\$1,567,000	\$1,567,000
Maintenance & Operations of SAC (released)	\$176,000	(\$176,000)	\$0
Pending Allocations for GI2025/Basic Needs	\$752,290	\$687,000	\$1,439,290
Benefits Savings		(\$3,486,265)	(\$3,486,265)
Division Salary Savings, OE&E Reduction		(\$4,074,284)	(\$4,074,284)
	<b>\$928,290</b>	<b>(\$5,482,549)</b>	<b>(\$4,554,259)</b>
<b>Total Approved Division Requests and Priorities</b>	<b>\$8,216,848</b>	<b>(\$3,776,376)</b>	<b>\$4,440,472</b>
<b>Net Sources (Uses)</b>	<b>\$9,483</b>	<b>\$42,152,928</b>	<b>\$42,162,411</b>
		<b>Beginning Budget</b>	<b>(\$36,709,741)</b>
		<b>Ending Budget</b>	<b>\$5,452,670</b>

Footnotes:

<sup>(a)</sup> Includes funding for faculty.

<sup>(b)</sup> Annualize prior commitments.

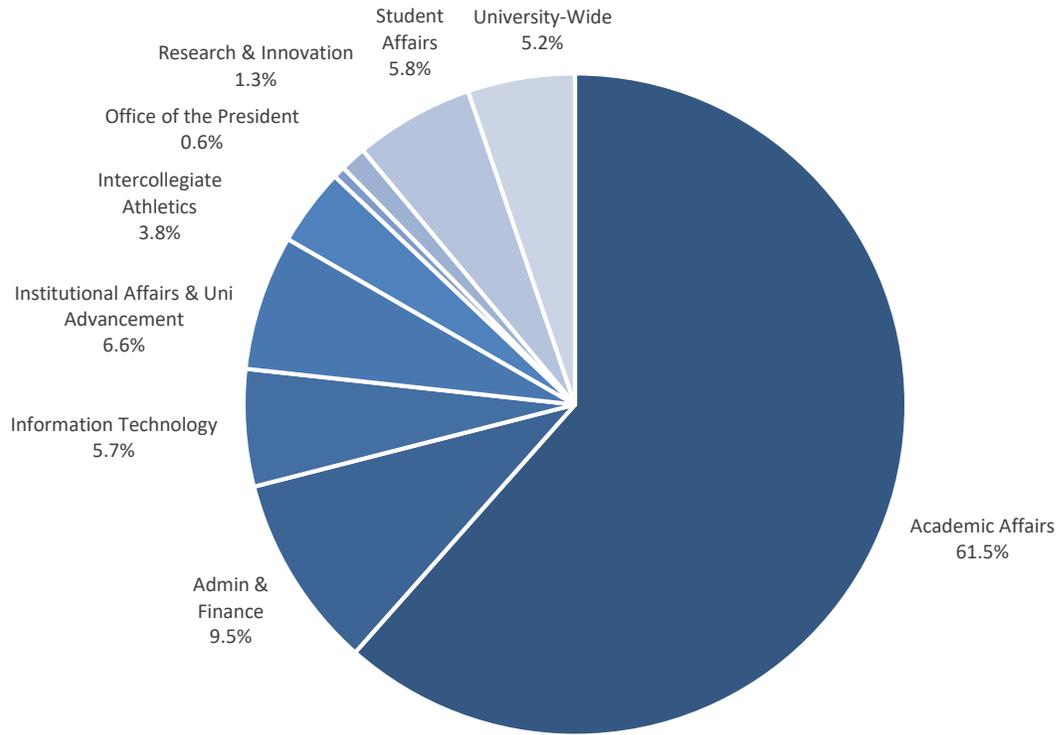
## 2022/23 EXPENDITURE BUDGET BY UNIVERSITY DIVISION

	Academic Affairs	Admin & Finance	Information Technology	Institutional Affairs & University Advancement	Intercollegiate Athletics	Office of the President	Research and Innovation	Student Affairs	University- Wide	Total University	% of Total
<b>Operating Fund <sup>(a)</sup></b>											
Salaries	\$172,377,429	\$21,735,752	\$12,413,125	\$16,204,814	\$11,219,710	\$1,341,494	\$2,143,041	\$13,553,947	\$2,425,463	\$253,414,775	33.5%
Projected Benefits <sup>(b)</sup>	\$82,741,166	\$10,433,161	\$5,958,300	\$7,778,311	\$5,385,461	\$643,917	\$1,028,660	\$6,505,895	\$776,668	\$121,251,538	16.0%
OE&E	\$15,866,703	\$9,550,211	\$6,790,765	\$5,074,134	\$0	\$582,146	\$2,369,667	\$5,615,774	\$19,821,980	\$65,671,380	8.7%
<b>Subtotal</b>	<b>\$270,985,298</b>	<b>\$41,719,124</b>	<b>\$25,162,190</b>	<b>\$29,057,259</b>	<b>\$16,605,171</b>	<b>\$2,567,557</b>	<b>\$5,541,367</b>	<b>\$25,675,615</b>	<b>\$23,024,111</b>	<b>\$440,337,693</b>	<b>58.2%</b>
Restricted Student Aid <sup>(c)</sup>	\$702,903	\$292,857	\$28,571	\$157,143	\$57,857	\$128,571	\$57,143	\$275,668	\$38,199,203	\$39,899,916	5.3%
<b>Total Operating Fund</b>	<b>\$271,688,201</b>	<b>\$42,011,981</b>	<b>\$25,190,761</b>	<b>\$29,214,402</b>	<b>\$16,663,028</b>	<b>\$2,696,128</b>	<b>\$5,598,510</b>	<b>\$25,951,283</b>	<b>\$61,223,314</b>	<b>\$480,237,609</b>	<b>63.5%</b>
Graduate Business Professional Fee	\$861,000								\$170,000	\$1,031,000	0.1%
Student Orientation Programs	\$8,000							\$1,882,273		\$1,890,273	0.2%
SSETF-Instructionally Related Activities <sup>(d)</sup>	\$1,500,998				\$9,354,859			\$500,000	\$189,793	\$11,545,650	1.5%
SSETF-Course Support <sup>(d)</sup>	\$3,354,375								\$145,898	\$3,500,273	0.5%
SSETF-Student Success <sup>(d)</sup>	\$6,172,541		\$350,000			\$65,189		\$2,503,527	\$2,225,128	\$11,316,385	1.5%
<b>Campus Revenue Funds</b>											
Professional and Continuing Education	\$35,828,268	\$4,647,024						\$1,478,599	\$1,395,328	\$43,349,220	5.7%
Housing Funds								\$50,141,485		\$50,141,485	6.6%
Lottery Funds	\$2,385,410							\$6,900	\$187,461	\$2,579,771	0.3%
Other Revenue Sources <sup>(e)</sup>	\$617,500				\$8,071,444			\$455,000		\$9,143,944	1.2%
Parking Funds		\$9,185,829								\$9,185,829	1.2%
Student Health Funds								\$18,205,566		\$18,205,566	2.4%
<b>Campus Auxiliaries</b>											
Associated Students								\$10,178,252		\$10,178,252	1.3%
Research Foundation							\$54,487,500			\$54,487,500	7.2%
Spartan Shops		\$3,345,669								\$3,345,669	0.4%
Student Union								\$16,017,282		\$16,017,282	2.1%
Tower Foundation				\$30,200,500						\$30,200,500	4.0%
<b>Total All Funds</b>	<b>\$322,416,293</b>	<b>\$59,190,503</b>	<b>\$25,540,761</b>	<b>\$59,414,902</b>	<b>\$34,089,331</b>	<b>\$2,761,317</b>	<b>\$60,086,010</b>	<b>\$127,320,167</b>	<b>\$65,536,922</b>	<b>\$756,356,208</b>	<b>100.0%</b>

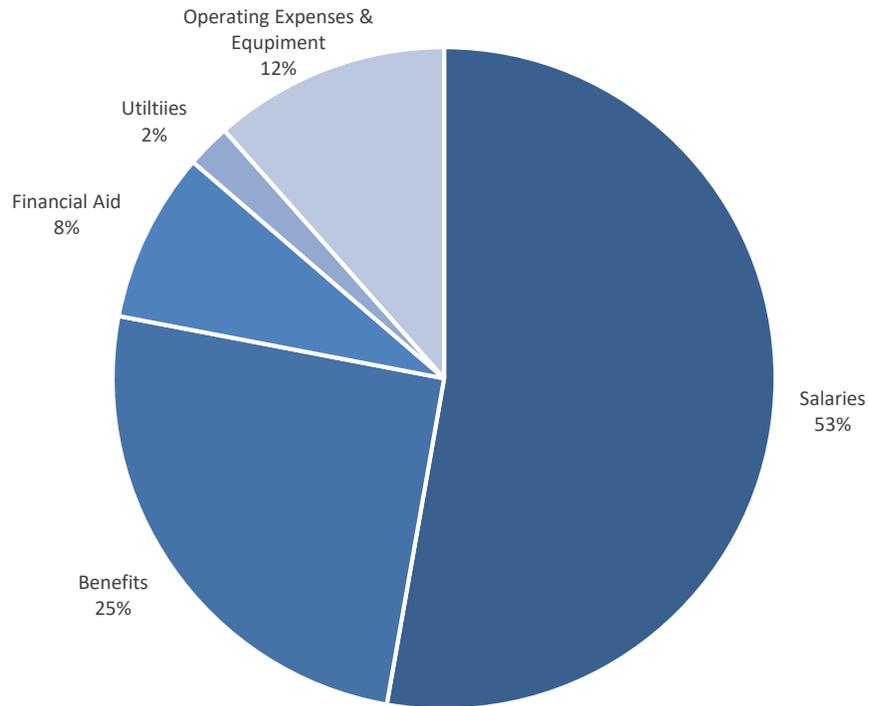
**Footnotes:**

- (a) Operating Fund expenditure budget includes base budgets plus one-time funding allocated in the current year as of September accounting close.
- (b) Benefit budgets for the Operating Fund are projected across all divisions at 48% of salaries.
- (c) Restricted Student Aid includes Federal Work Study and matching portions, Tuition Discount (SUG), Supplemental Educational Opportunity Grants (SEOG) and State Graduate Fellowship Grants.
- (d) Refer to the 2022/23 Student Success, Excellence Technology Fee financial display for greater detail.
- (e) Other Revenue Sources include miscellaneous revenues from ticket sales, fundraising (for Athletics), rental of University space, and other miscellaneous revenue-generating activities.
- (f) U-Wide includes reserves, utilities, MLK Facility, Hammer Theatre, risk management, hazardous waste, space rental, and university membership fees.

### 2022/23 Operating Fund Expenditure Budget by Division



### 2022/23 Operating Fund Expenditure Budget by Category



## COMPARISON OF CSU CAMPUS EXPENDITURES

### 2020/21 Expenditures by Category for San José and "Big 5" CSU Institutions

	San José		Northridge		San Diego		San Francisco		Long Beach		Fullerton	
	Actuals	%	Actuals	%	Actuals	%	Actuals	%	Actuals	%	Actuals	%
<i>(\$ millions)</i>												
Instruction	\$208.7	47%	\$197.0	43%	\$220.1	45%	\$189.5	50%	\$226.7	47%	\$214.3	48%
Research	\$1.0	0%	\$3.6	1%	\$5.3	1%	\$0.7	0%	\$3.2	1%	\$0.7	0%
Public Service	\$3.3	1%	\$1.0	0%	\$1.5	0%	\$1.6	0%	\$1.1	0%	\$1.8	0%
Academic Support	\$37.7	9%	\$45.2	10%	\$52.6	11%	\$40.2	10%	\$49.7	10%	\$35.5	8%
Student Services	\$60.9	14%	\$62.2	13%	\$68.5	14%	\$33.1	8%	\$54.8	11%	\$47.1	10%
Institutional Support	\$46.9	11%	\$40.3	9%	\$55.9	11%	\$42.6	11%	\$43.9	9%	\$62.6	14%
Operation & Maintenance	\$42.7	9%	\$41.3	9%	\$42.0	8%	\$35.3	9%	\$46.1	9%	\$31.8	7%
Student Financial Aid	\$42.1	9%	\$71.0	15%	\$50.9	10%	\$48.1	12%	\$62.0	13%	\$57.2	13%
Total Operating Expenses <sup>(a)</sup>	\$443.3	100%	\$461.5	100%	\$496.8	100%	\$391.1	100%	\$487.7	100%	\$451.1	100%
2020/21 College Year FTES <sup>(b)</sup>	28,599		33,093		32,943		23,179		33,837		34,563	
\$ Expended per FTES	\$15,501		\$13,945		\$15,081		\$16,873		\$14,413		\$13,051	

**Footnotes:**

<sup>(a)</sup> Expenditure data provided by the CSU Budget Office. The data reports all CSU Operating Fund activity by program and GAAP financial classifications.

<sup>(b)</sup> Full Time Equivalent Students (FTES) reported per CSU Enrollment Dashboards available from <https://www.calstate.edu/data-center/institutional-research-analyses>.

## Select Funds and Self-Support Operations

Capital Outlay and Deferred Maintenance

Student Success, Excellence and Technology Fee

Intercollegiate Athletics

Lottery Fund

College of Professional and Global Education (CPGE)

Professional and Continuing Education (PaCE)

Student Wellness Center

University Housing Services

University Parking Services

## CAPITAL OUTLAY AND DEFERRED MAINTENANCE

As the oldest campus in the California State University system, San José State University has continuously planned and evolved to meet the anticipated growth of its footprint and physical space. In support of the Transformation 2030 strategic vision of the campus, a Campus Master Plan is under development to assess and address space and functional needs of the campus and local community. Extensive feedback has been solicited to ensure that the Plan's framework reflects the vision and goals of SJSU's future and that the Plan can guide the strategy for future campus growth through 2040.

In conjunction with that longer range plan, the campus continues to invest in the maintenance of existing facilities and improvements as funding allows. Each year, all CSU campuses submit a plan to the Office of the Chancellor to request the inclusion of projects in the CSU's Multi-Year Plan for facilities renewal and capital improvements. The comprehensive CSU Multi-Year Plan includes both academic and self-support projects and is presented to the CSU Board of Trustees and later submitted to the State Legislature and Department of Finance for funding.<sup>4</sup> The campus has put forward a number of major capital projects for inclusion in the CSU Multi-Year Plan for 2022/2023 through 2026/2027, including major renovations of Engineering and Duncan Hall as academic projects, other deferred maintenance and infrastructure improvement projects, and Campus Village 3 for Student Housing.

### *Major Capital Improvements*

On Main Campus, the Interdisciplinary Science Building (ISB), the first new academic building in over three decades, is moving towards a March 2023 substantial completion. The building will deliver 165,000 GSF of modern and dynamic space for teaching, research, collaborative spaces, and offices. The construction of the Spartan Athletics Center (SAC) project at South Campus is also well under way. The 55,000 GSF, two-story facility on the east side of CEFCU Stadium is on schedule to open in summer 2023.

Planning efforts for the mixed-use housing project at the Alfred E. Alquist Building site in downtown San José continue to progress towards a January 2023 approval hearing before the CSU Board of Trustees. Envisioned as a public-private partnership, the Alquist project seeks to deliver 1,000 apartment units with space reserved for university graduate students, faculty, and staff with both subsidized and market rate units. Upon approval by the Board of Trustees, requests for proposals would be released for bidding by general contractors and development firms.

The campus is also preparing a proposal to access State Affordable Student Housing grant funding, made available under the Postsecondary Education Trailer Bill (SB 169) approved by the Governor in September 2021, for a Campus Village 3 and Dining Commons project.

### *Deferred Maintenance, Renewal, and Improvements*

The CSU and campus continue to commit significant resources towards reducing the backlog of deferred maintenance. The Budget Act of 2021 included one-time General Fund support for the CSU, of which \$898 million was allocated towards facilities & infrastructure projects. San José received \$18.7 million towards five

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<sup>4</sup> Plans may be viewed online from the Capital Planning, Design and Construction Resource Library at [www.calstate.edu/cpdc](http://www.calstate.edu/cpdc).

deferred maintenance and energy efficiency projects including critical fire alarm projects, roof and HVAC replacements, and a master key system. For 2022/23, San José was recently awarded an additional \$6.9 million for another set of deferred maintenance projects needed at Duncan Hall and Moss Landing. Note this amount was only 1% of the funds received by the Chancellor's Office.

Each year, the campus receives an annual dividend payout from the CSU's invested Total Return Portfolio (TRP), which is restricted under California Education Code to be used to support deferred maintenance and capital improvements. Last year's dividend amount was \$3.8 million, which will support an array of capital project needs both large and small on Main and South Campus.

## STUDENT SUCCESS, EXCELLENCE AND TECHNOLOGY FEE

Introduced in Fall 2012, the Student Success, Excellence and Technology Fee (SSETF) is a mandatory student fee paid by all matriculated and enrolled students. The fee was approved by Executive Order 1078 to support and expand on six articulated priorities of student success and subsumed other existing Miscellaneous Course Fees (field trip fees excluded) and Instructionally Related Activities (IRA) fees. The priorities are as follows:

- Student Success Services & Graduation Pathways: Expand support for comprehensive student success services and improved pathways to graduation.
- Academic Technology: Enhance support for effective student-related academic technology initiatives that complement, but do not duplicate, technology initiatives identified in CSU's annual support budget.
- 21st Century Teaching Spaces: Create 21<sup>st</sup> century classrooms, labs and learning spaces, including virtual spaces (e.g., lecture capture, e-portfolios, social media, etc.)
- Retention & Graduation: Expand support for all students and work to close the retention and graduation gap for Under-represented Minority students (URM).
- Course Support: Enhance support for instructional materials and methods used in the delivery of instruction.
- Instructionally Related Activities: Support for activities that fall under the definition of and statutes related to Instructionally Related Activities (IRA) in Title 5 and the California Education code, including Athletics.

The fee is subject to an annual inflationary adjustment based on the Commonfund Higher Education Price Index (HEPI). For 2022/23, the fee was increased from \$334.50 to \$343.50 per academic year term. As the fee is structured as a headcount-based fee, fee revenue is subject to the variability of enrollment levels.

### *Funding Call and the Campus Fee Advisory Committee (CFAC)*

In March 2022, a call for funding proposals for expending over two years, 2022/23 and 2023/24, was issued to campus Divisions. All proposals submitted were reviewed by the Campus Fee Advisory Committee (CFAC) in May 2022 and the committee provided an advisory recommendation regarding the proposals to the President. The President subsequently approved one-time commitments of \$4.3 million in June 2022. The following commitments were approved for funding:

	<b>2022/23</b>	<b>2023/24</b>	<b>Total</b>
<u>Academic Affairs</u>			
LCoB Enhanced Student Success Support	\$78,144	\$80,488	\$158,632
Extended Study Hours in the Library	\$419,011	\$439,773	\$858,784
Late Night Tutoring in the Library	\$106,560	\$115,200	\$221,760
Undergraduate Advising Support for 1 <sup>st</sup> and 2 <sup>nd</sup> Yr Students	\$772,560	\$795,737	\$1,568,297
	<b>\$1,376,275</b>	<b>\$1,431,198</b>	<b>\$2,807,473</b>
<u>Office of the President (ODEI)</u>			
Undergraduate Research Opportunity Program	\$72,000	\$0	\$72,000
	<b>\$72,000</b>	<b>\$0</b>	<b>\$72,000</b>
<u>Student Affairs</u>			
1 <sup>st</sup> Yr Transition Program for Historically Underserved	\$167,400	\$171,276	\$338,676
Native American/Indigenous Student Success Center	\$144,007	\$147,300	\$291,307
APID/A Student Success Center	\$252,312	\$258,846	\$511,158
ESports & Campus Connections	\$130,000	\$133,900	\$263,900
	<b>\$693,719</b>	<b>\$711,322</b>	<b>\$1,405,041</b>
 Grand Total	 <b>\$2,141,994</b>	 <b>\$2,142,520</b>	 <b>\$4,284,514</b>

**Student Success, Excellence & Technology Fee  
2022/23 Budget**

	SSETF - IRA	SSETF - Course Support	SSETF - Student Success	Total
<b>Revenues</b>				
Fees <sup>(a)</sup>	\$11,266,859	\$2,300,282	\$9,002,052	\$22,569,193
<b>Total Revenues</b>	<b>\$11,266,859</b>	<b>\$2,300,282</b>	<b>\$9,002,052</b>	<b>\$22,569,193</b>
<b>Division Expenses</b>				
Academic Affairs	\$1,500,998	\$3,354,375	\$6,172,541	\$11,027,914
Student Affairs			\$2,373,527	\$2,373,527
Student Union	\$500,000		\$130,000	\$630,000
Intercollegiate Athletics	\$9,354,859			\$9,354,859
Information Technology			\$350,000	\$350,000
Office of the President			\$65,189	\$65,189
University-Wide <sup>(b)</sup>	\$189,793	\$145,898	\$2,225,128	\$2,560,819
<b>Total Division Expenses</b>	<b>\$11,545,650</b>	<b>\$3,500,273</b>	<b>\$11,316,385</b>	<b>\$26,362,308</b>
<b>Net Revenue (Expense)</b>	<b>(\$278,791)</b>	<b>(\$1,199,991)</b>	<b>(\$2,314,333)</b>	<b>(\$3,793,115)</b>
<b>Prior Year Balance</b>	<b>(\$62,304)</b>	<b>\$1,199,991</b>	<b>\$5,979,624</b>	<b>\$7,117,311</b>
<b>Projected Ending Balance</b>	<b>(\$341,095)</b>	<b>(\$0)</b>	<b>\$3,665,291</b>	<b>\$3,324,198</b>

Footnotes:

<sup>(a)</sup> Fees includes both base and one-time projected revenues.

<sup>(b)</sup> University-Wide includes employee benefits pool. Budget is allocated over the course of the fiscal year to Divisions (excluding Athletics) to cover the actual benefit expenses incurred.

<sup>(c)</sup> Balance displayed is net of encumbrances at prior year-end.

<sup>(d)</sup> The SSETF-IRA fund currently displays a structural deficit due to the decline in budgeted enrollment, as well as prior year commitments and employee compensation adjustments for Divisions other than Athletics. Revenues from surplus enrollment and future year inflationary adjustments will be committed to resolving the deficit.

## INTERCOLLEGIATE ATHLETICS

The vision of San José State Athletics is captured in The Charge of the Spartans, to provide a cutting-edge experience for student-athletes and promote an environment that builds champions in the classroom, in competition, and in the community.

We uphold University values for excellence by:

- Establishing San Jose State University, Spartans Athletics, and the city of San Jose as a first-choice destination;
- Accelerating a transformative environment that encourages personal and professional growth, and the pursuit of knowledge, while advancing University and Athletics goals and objectives;
- Being innovative in consistently seeking once unimaginable accomplishments by utilizing a forward-thinking mindset and strategically building meaningful relationships with University students, faculty, staff, alumni, sponsors, donors and friends;
- Emanating positivity and giving maximum effort in growing the SJSU brand, its student-focused traditions, and unifying all constituents;
- Focusing on the foundational principles of fiscal responsibility and efficiency, health and welfare considerations, gender equity, social and racial justice, diversity and inclusion, collaboration, and good sporting conduct by all coaches, administrative staff and student-athletes.

This past year, Spartan Athletics won the Mountain West Championship in Women's Golf and the MPSF Championship in Women's Gymnastics. Women's Golf finished in the top eight nationally, losing in the NCAA Championship quarterfinals to the eventual NCAA Runner-Up. Each coach and their staffs were extended and received additional compensation. Both of these groups are doing impressive work with our student-athletes, graduation rates, and university image.

This past year brought noteworthy improvements to facilities, specifically for Soccer, Softball, Baseball, Volleyball, and Basketball. Construction began on the Spartan Athletics Center, which will provide a new home for Football and Men's and Women's Soccer. All of these improvements significantly and positively changed the recruiting, retention, and performance of these teams. Notably, Baseball made the Mountain West Championship for the first time in program history. Additionally, enhancements were made in Athletic Performance, which benefits all teams, and all student-athletes have access to heightened nutrition and non-travel meals on a regular basis.

The COVID-19 pandemic created challenges in game scheduling and game attendance, which translates to lower ticket revenue. The upcoming year's ticket revenue projections are back at pre-pandemic levels, and the department has a new subscription-based season ticket model. This new model is the first of its kind in collegiate athletics and is predicted to have a greater impact on overall attendance at home events.

Student-athlete well-being continues to be at the forefront of the 2022/23 budget. The division is hiring an Assistant Athletic Director for Diversity, Equity, and Inclusion, as well as a DEI Consultant. Mental health and student-athlete advisory committee offerings have been increased. The Beyond Sparta program was implemented this past year and expanded from 100 participants to serve 470 student-athletes. The program

integrates student-athletes into the campus community, using their athletic platform to elevate underserved populations through community service, and enriches their personal brand through professional development.

Even with all these changes (except in a very few instances), SJSU is typically at or below the funding midpoint of the conferences where we compete.

Two coaches and the staffs were changed in Women's Basketball and Women's Soccer. Each of these positions, staffs, and operations have been significantly upgraded.

During the past year, new deals for sponsorships, ticketing, apparel, and multi-media rights were negotiated, and Spartan Athletics now has several events on regional and national television, bringing the SJSU brand to new populations and markets. SJSU Athletics is the only collegiate sports property in the Bay Area that has a partnership with a regional sports network (NBC Sports Bay Area), and we are one of only two universities nationwide to televise our student-athlete awards show, The Sammy's.

In conclusion, managing a robust FBS level Division I program with 22 sponsored sports is a formidable yet impactful endeavor. Spartan Athletics will continue to engage in efforts to generate much needed additional revenue, while maintaining a strong commitment to fiscal responsibility.

**Intercollegiate Athletics  
2022/23 Budget**

	CSU Operating Fund	SSETF	Generated Revenues	Total
<b>Revenues/Allocations</b>				
Allocated Funds	\$16,400,171	\$9,354,859		\$25,755,030
Estimated benefits	Incl above			\$0
<b>Subtotal</b>	<b>\$16,400,171</b>	<b>\$9,354,859</b>	<b>\$0</b>	<b>\$25,755,030</b>
New Coaches MBB / FB	\$100,000			\$100,000
Wellbeing Attendant				
Chaperones	\$105,000			\$105,000
<b>Subtotal</b>	<b>\$205,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$205,000</b>
Work-Study Funds	\$57,857			\$57,857
MW Proceeds / Development from Tower			\$3,191,012	\$3,191,012
Ticket Sales			\$850,000	\$850,000
Game Guarantees			\$2,182,000	\$2,182,000
NCAA Distribution			\$1,688,502	\$1,688,502
Facilities/Marketing			\$159,930	\$159,930
<b>Total Revenues/Allocations</b>	<b>\$16,663,028</b>	<b>\$9,354,859</b>	<b>\$8,071,444</b>	<b>\$34,089,331</b>
<b>Expenses</b>				
<b>Salaries &amp; Benefits</b>				
Salaries	\$11,219,710	\$412,302		\$11,632,012
Benefits	\$5,385,461	\$197,905		\$5,583,366
Graduate Assistants			\$198,535	\$198,535
Work Study	\$57,857			\$57,857
<b>Subtotal</b>	<b>\$16,663,028</b>	<b>\$610,207</b>	<b>\$198,535</b>	<b>\$17,471,770</b>
<b>Operating Expenses &amp; Equipment</b>				
Grants in Aid			\$7,756,897	\$7,756,897
Team Travel		\$3,291,734		\$3,291,734
Operational Expense		\$5,452,918	\$116,012	\$5,568,930
<b>Subtotal</b>	<b>\$0</b>	<b>\$8,744,652</b>	<b>\$7,872,909</b>	<b>\$16,617,561</b>
<b>Total Expenses</b>	<b>\$16,663,028</b>	<b>\$9,354,859</b>	<b>\$8,071,444</b>	<b>\$34,089,331</b>
<b>Net Revenues of Expenses</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Prior Year Fund Balance</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Ending Fund Balance, All Funds</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

## LOTTERY FUND

San José State University will receive almost \$2.5 million in lottery revenues from the CSU in 2022/23. Actual revenues to SJSU are based on deposits received quarterly by the CSU from the California State Lottery, and they are adjusted due to fluctuations in lottery receipts. CSU lottery revenue projections are conservative and usually do not vary significantly from one fiscal year to the next, however for 2022/23, the campus received an increase of \$262,000 in Lottery funds which will support needs in the Library.

The primary programs supported by Lottery Funds are:

- Library, Library Acquisitions (books, periodicals, subscriptions, etc.). The campus has designated \$2.2 million for this program.
- The Teacher Recruitment Project (TRP) which provides funding of \$75,000 to support the recruitment of students into mathematics and science teaching careers. The goal is to attract participants from environments in which teaching has not been a common career goal, assisting these students in qualifying for entrance into the teaching profession. Participants include teacher aides from K-12 schools, secondary school students, community college students, and undergraduate students interested in teaching as a profession.

In addition to the estimated funding support in the Lottery Fund, the CSU also provides \$100,000 for the Early Assessment Program (EAP), which is a collaborative effort between California State University (CSU), the California Department of Education (CDE), and California State Board of Education (SBE). The goal of EAP is to improve mathematics, reading, and writing skills among college-bound high school students in the local schools through early testing for all grade 11 students. Those students who need extra work can take courses (developed jointly by high school and university teachers) during their senior year to help prepare for college. The program also provides funding support for teacher development, which enables CSU faculty to sponsor reading institutes and develop teaching materials to assist high school teachers to improve their skills.

Lastly, the CSU also provides funding support for the California Pre-Doctoral Program which is administered by the Chancellor's Office of Academic Services and Professional Development. This program is designed to increase the pool of university faculty by supporting the doctoral aspirations of individuals who are current upper-division or graduate students in the CSU, economically and educationally disadvantaged, interested in a university faculty career, U.S. citizens or permanent residents, and leaders of tomorrow. Students who are chosen for this award are designated Sally Casanova Scholars as a tribute to Dr. Sally Casanova, for whom the Pre-Doctoral scholarship is named. Funding is a pass-through and is disbursed by the campus Financial Aid office. Three SJSU students were selected as Sally Casanova California Pre-Doctoral Scholars for 2022/23, and each of them will receive a \$3,000 scholarship to support their Pre-Doctoral activities.

**Lottery Fund  
2022/23 Budget**

<b>Revenues</b>	
CSU Allocation	\$2,483,000
Interest	\$500
Early Assessment Program	<u>\$100,000</u>
<b>Total Revenues</b>	<b><u><u>\$2,583,500</u></u></b>
<b>Expenses</b>	
<b>Operational Costs</b>	
University Administrative Overhead	\$176,870
CSU Risk Pool Assessment	\$10,191
Interfund Pension Loan	<u>\$400</u>
	<b><u>\$187,461</u></b>
<b>Funded Activities/Programs</b>	
University Library Funding	\$2,162,000
Teacher Recruitment Project	\$75,000
Early Assessment Program	\$100,000
C.O. PY Initiatives (SJSU Spartan Student Impact, SJSU House Concept, STEM VISTA, AL\$)	<u>\$55,310</u>
	<b><u>\$2,392,310</u></b>
<b>Total Expenses</b>	<b><u><u>\$2,579,771</u></u></b>
<b>Net Revenue (Expense)</b>	<b>\$3,729</b>
<b>Prior Year Fund Balances</b>	
Undesignated	\$456,487
Early Assessment Program	\$12,124
Pre-Doctoral Program	<u>\$17,049</u>
<b>Projected Ending Fund Balance</b>	<b><u><u>\$489,389</u></u></b>

## College of Professional and Global Education (CPGE)

The mission of the College of Professional and Global Education (CPGE) is to provide access to relevant educational programs which allow individuals to gain knowledge and skills in a dynamic, innovative environment. We aspire to be a globally recognized college that shapes the future workforce, by preparing students for professions that exist today and those that have yet to be created.

### *Highlights of the 2022/23 Budget*

The Professional and Continuing Education (PaCE) revenues for 2022/23 are projected at \$43.4 million, including non-credit revenues, and are exclusive of PaCE revenue from San José Online and Early Start Program. Following the current revenue distribution model, approximately \$34.2 million will be allocated for shared costs to campus partners (i.e., Divisions of Academic Affairs, Student Affairs, and Administration and Finance).

During the last few years, CPGE had a couple of significant organizational changes which increased the scope of our operations from offering and managing self-support programs to now offering regular, state-side programs, similar to the other academic colleges across campus. To ensure our success as an academic college, we have planned investments in key and foundational areas of student success (e.g., creating resources and staffing for student advising), faculty success (e.g., ensuring diverse faculty recruitment/retention in STEM fields and supporting RSCA), and curricular innovation. Our college's model of offering both state and self-support degree programs allows us to invest in the university's instructional and research mission. We have created pathways to co-fund and sustain tenure-track faculty hiring as well as RSCA-related activities for faculty and students.

Enrollment growth is projected to increase through an accelerated increase in special session degree programs and faculty-led short-term study abroad courses. Investment in new program development, diversifying our program base, and enhancing the "value add" of our existing programs are additional ways we will achieve growth. We seek to maintain leadership among the CSUs in terms of self-supporting graduate programs and working to expand our special session portfolio of undergraduate degree programs.

It is critical to note that the number of self-support programs has more than doubled in the last five years, yet our staffing to support these programs has not kept pace. As we invest in our infrastructure (classroom, laboratory space, faculty, instructors, and support staff) to provide for program growth, student success, and research-active faculty, our multi-year financial plan provides funding to support new positions and retention to ensure and sustain the success of our programs and our students. Our 2022/23 business plan reflects our attempt to right-size our staffing to first close the gap in meeting current needs, and future resource allocations to ensure that we have the added staff for the planned increases in programs and the associated workload.

In addition to the infrastructure challenges to scale up, increasing competition in the areas of non-student recruitment and online education, challenges in state authorizations for online offerings, the increasing competition from other Bay Area universities and Silicon Valley campuses of other reputed institutions (eg., Carnegie Mellon, Northeastern, and UC Santa Cruz) pose formidable competition to our professional degree programs. To grow and sustain our market share, we must continue to explore emergent growth areas and work together with partner colleges to develop new professional degree and certificate programs and invest in our facilities, faculty, and staff.

The Interdisciplinary Science Building (ISB) will increase classroom and laboratory capacity in the STEM programs. CPGE will leverage this facility to increase applied research capacity, engage in curricular innovation, and promote entrepreneurship opportunities, however, the space will require considerable investments in capital infrastructure to create the most innovative classrooms to achieve their growth potential, an incubator/accelerator complex to provide students a learning experience on real-world innovation and entrepreneurship as well as a state-of-the-art laboratory (the Innovation Loft), all requiring a significant contribution from PaCE funds. The Innovation Loft's incubator/accelerator spaces are not expected to be self-sufficient for at least another four to five years. This is the minimal lead time to monetize and commercialize any intellectual property (IP). Likewise, while we also have plans to generate revenue through company tenancy or co-working arrangements in our accelerator spaces, it will require time for business opportunities to develop and close, especially given that SJSU is nascent in innovation and entrepreneurial service offerings. We expect full program viability by year five of the launch.

CPGE has and is continuing to grow by developing new programs to meet the needs and serve the interests of the university, the region, and the global community. We have over the years continued to maintain a steady fund balance to cover our operational contingencies, provide funds to support strategic initiatives both at the university and the division level, and maintain adequate reserves to meet business operational needs. The continuation of CPGE's decision-making ability to invest and re-invest its funds into its strategic priorities and the associated resources is critical to maintaining its growth trajectory and success.

**College of Professional and Global Education (CPGE)  
2022/23 Budget**

	Central Operations	Academics <sup>(a)</sup>	Study Abroad and Away	Total
<b>Revenues</b>				
Revenues	\$8,278,539	\$11,502,665	\$1,037,500	\$20,818,704
Interest			\$15,445	\$15,445
<b>Total Revenues <sup>(b)</sup></b>	<b>\$8,278,539</b>	<b>\$11,502,665</b>	<b>\$1,052,945</b>	<b>\$20,834,149</b>
<b>Expenses</b>				
<b>Salaries and Benefits</b>				
Salaries and Staff Benefits	\$5,934,327	\$9,432,192	\$618,696	\$15,985,215
Student Assistants	\$162,000	\$306,000	\$10,368	\$478,368
	<b>\$6,096,327</b>	<b>\$9,738,192</b>	<b>\$629,064</b>	<b>\$16,463,583</b>
<b>Operating Expenses &amp; Equipment</b>				
Communications	\$8,500	\$11,600		\$20,100
Travel	\$50,000	\$373,000	\$206,457	\$629,457
Contractual Services <sup>(c)</sup>	\$686,785	\$374,000	\$174,908	\$1,235,693
Information Technology	\$54,700	\$111,316	\$24,080	\$190,096
Postage	\$6,400	\$6,000		\$12,400
Printing	\$38,400	\$6,500	\$4,000	\$48,900
Supplies	\$253,186	\$110,000	\$2,200	\$365,386
Training & Prof Dev.	\$50,720	\$5,000	\$5,000	\$60,720
Advertising	\$215,400	\$400,000		\$615,400
Library Cost Recovery		\$482,037		\$482,037
Space Rental	\$318,554			\$318,554
Accreditation		\$1,213		\$1,213
Recruitment & Relocation	\$17,400	\$160,000		\$177,400
Memberships Due	\$10,124	\$56,480	\$1,200	\$67,804
Facility Use Fee	\$81,000			\$81,000
FD&O Service Charges	\$102,380			\$102,380
Food Catering		\$40,000		\$40,000
Other Operating	\$49,500	\$2,800		\$52,300
Operating Transfers Out Scholarships		\$300,999		\$300,999
Student Success Center		\$200,000		\$200,000
Prior Year Expenditure Adj	\$223,127	\$163,444	\$12,915	\$399,486
	<b>\$2,166,176</b>	<b>\$2,804,389</b>	<b>\$430,760</b>	<b>\$5,401,325</b>
<b>Total Expenses</b>	<b>\$8,262,503</b>	<b>\$12,542,581</b>	<b>\$1,059,824</b>	<b>\$21,864,908</b>
<b>Net Revenue (Expense)</b>	<b>\$16,036</b>	<b>(\$1,039,916)</b>	<b>(\$6,879)</b>	<b>(\$1,030,759)</b>
<b>ISB Space T&amp;I Installments</b>	<b>(\$88,795)</b>			<b>(\$88,795)</b>
<b>Prior Year Fund Balance</b>	<b>\$410,553</b>	<b>\$2,655,149</b>	<b>\$232,358</b>	<b>\$3,298,060</b>
<b>Projected Ending Fund Balance</b>	<b>\$337,794</b>	<b>\$1,615,233</b>	<b>\$225,479</b>	<b>\$2,178,506</b>

Footnotes:

<sup>(a)</sup> Academics includes School of Information and Applied Data Science department in the college.

<sup>(b)</sup> Projected Central Operations revenue allocation from credit programs (special session and summer and winter intersession) and non-credit programs.

<sup>(c)</sup> The projected contractual services expenditures under faculty-led study abroad includes the students and faculty travel, lodging, insurance and other program specific expenses budgeted and funded from program fees.

## PROFESSIONAL AND CONTINUING EDUCATION (PACE)

The College of Professional and Global Education (CPGE) manages professional and continuing education (PaCE) programs, professional education programs for current and prospective students and professionals seeking to expand their learning and advance in their careers. The programs (degrees and certificates) and courses (credit, non-credit, and professional development units) are designed to educate and engage skilled individuals to contribute to their communities' economy, culture, and future. Professional education program streams include:

- Open University (OU) program allows course access to non-matriculated students (including disqualified students) on a space-available basis to pursue their educational or personal enrichment goals and earn college credit.
- Intersession courses provide current San José State University students and the public an opportunity to take classes for college credit in winter and summer sessions.
- Special Session professional degree programs and certificates offer a unique opportunity for both traditional students and working professionals to earn academic credentials at an alternate schedule, often online and/or off campus.
- Non-credit continuing education unit programs offer an opportunity for professionals to quantify their time in professional development and training activities. The university maintains a record of its educational accomplishments for non-credit educational and career enhancement experiences.
- Programs are offered in innovative modes (online, asynchronous, and accessible off-site locations) with accessible schedules (evenings, weekends, and summers) to ensure that individuals from all walks of life (traditional students, re-entrants to the workforce, career changers, and working professionals) have access to our program offerings.

With \$43.8 million in PaCE revenue for the year ending June 30, 2022, SJSU accounted for 10% of the total \$424 million in PaCE revenue for the CSU and was the top generator amongst the twenty-three campuses. Following the current revenue distribution model, \$34.2 million of gross revenue was allocated to campus partners, i.e., Divisions of Academic Affairs, Administration and Finance, and Student Affairs in support of shared costs.

Similarly, our PaCE programs have continued to serve the largest number of students over the past five years.

	Head Count	% Δ	FTES	% Δ
Fall 2017	2,489		1,181.0	
Fall 2018	2,647	6.3%	1,270.6	7.6%
Fall 2019	2,899	9.5%	1,413.2	11.2%
Fall 2020	3,275	13.0%	1,606.5	13.7%
Fall 2021	3,360	2.6%	1,653.0	2.9%

While the global pandemic and associated travel restrictions impacted our study abroad programs, we expect a recovery in the next three years as the pandemic transitions to an endemic. We have begun to ramp up our

Faculty-Led Programs as global travel resumes and travel restrictions relax. We plan to continue to offer programs using the two new pathways, piloted before the pandemic. The two pathways are the direct enrollment programs summer school abroad and winter faculty-led study abroad programs. The direct-enroll programs are more economical (because third-party involvement and their associated fees are not required) and offer a variety of course options, therefore supporting more majors across the university. Winter programs offer an opportune time between regular sessions. While we have been able to successfully offer curricular and co-curricular options to achieve global learning experiences for our students during the pandemic, the financial impact of not running core study abroad programs is evident.

SJSU's PaCE program portfolio in 2022/23 will include forty-six-degree programs and graduate certificates. In addition, we have a steady program pipeline of fourteen-degree programs over the next three to five years. We project to increase PaCE revenue over the next three years, through an accelerated increase in special session degree programs and faculty-led short-term study abroad courses. We seek to maintain leadership among the CSUs in terms of self-supporting graduate programs and working to expand our special session portfolio of undergraduate degree programs.

**Professional and Continuing Education Fund (PaCE)  
2022/23 Budget**

	Academic Affairs	Admin & Finance	Student Affairs	University Wide	Faculty-Led Study Abroad	Total
<b>Revenues</b>						
<b>Credit Revenues</b>						
Open University <sup>(a)</sup>		\$124,191	\$39,515	\$965,301		\$1,129,007
Special Session	\$25,145,783	\$3,254,160	\$1,035,415	\$147,916		\$29,583,274
Winter Session	\$1,679,822	\$217,389	\$69,169	\$9,881		\$1,976,261
Summer Session	\$8,123,561	\$1,051,284	\$334,500	\$47,786		\$9,557,130
Faculty Led Study Abroad <sup>(b)</sup>					\$1,025,500	\$1,025,500
	<u>\$34,949,165</u>	<u>\$4,647,024</u>	<u>\$1,478,599</u>	<u>\$1,170,884</u>	<u>\$1,025,500</u>	<u>\$43,271,172</u>
<b>Other Revenues</b>						
Non Credit Revenue	\$157,073				\$12,000	\$169,073
Interest				\$476,778	\$15,445	\$492,223
	<u>\$157,073</u>	<u>\$0</u>	<u>\$0</u>	<u>\$476,778</u>	<u>\$27,445</u>	<u>\$661,296</u>
<b>Total Revenues</b>	<u>\$35,106,238</u>	<u>\$4,647,024</u>	<u>\$1,478,599</u>	<u>\$1,647,663</u>	<u>\$1,052,945</u>	<u>\$43,932,468</u>
<b>Total Expenses</b>	<u>\$34,768,444</u>	<u>\$4,647,024</u>	<u>\$1,478,599</u>	<u>\$1,395,328</u>	<u>\$1,059,824</u>	<u>\$43,349,219</u>
<b>Net Revenue (Expense)</b>	\$337,794	\$0	\$0	\$252,335	(\$6,879)	\$583,250
<b>Transfer In (Out)</b>						
<b>Designated Reserves</b>						
Operating Reserve	\$3,672,092				\$363,916	\$4,036,008
Facility Reserve	\$2,516,417					\$2,516,417
Scholarship	\$760,380					\$760,380
Program Development	\$400,000					\$400,000
<b>Total Designated Reserves</b>	\$7,348,889	\$0	\$0	\$0	\$363,916	\$7,712,805
<b>Total Prior Yr Fund</b>						
<b>Balance</b>	<u>\$22,986,487</u>	<u>\$0</u>	<u>\$2,218,824</u>	<u>\$7,262,906</u>	<u>\$346,663</u>	<u>\$32,814,880</u>
<b>Projected Ending Fund</b>						
<b>Balance</b>	<u>\$23,324,281</u>	<u>\$0</u>	<u>\$2,218,824</u>	<u>\$7,515,240</u>	<u>\$339,784</u>	<u>\$33,398,129</u>

Footnotes:

<sup>(a)</sup> Academic Affairs receives Open University revenue in CSU Operating Fund and the balance is set aside for the university to use on capital projects or other strategic initiatives.

<sup>(b)</sup> Study Abroad revenue includes program fee (approx. \$ 1 million), which is a pass-through for program expenses, and not "true" revenue available for operating purposes.

<sup>(c)</sup> University-Wide balance includes 47% of Summer 2022 revenue earned in 2021/22 (\$7 million) and will be allocated to campus partners in 2022/23.

# STUDENT WELLNESS CENTER

San José State University’s Student Wellness Center (SWC) is a fully accredited outpatient clinic and student-development center that offers wellness education and health promotion programming and resources, counseling, psychological services, primary and specialty healthcare, and ancillary services including laboratory, pharmacy, and imaging.

2022/23 Goals	Objectives and Initiatives
1 Engage students and stakeholders to inform needs assessment, evaluate outcomes, and assist with the delivery of accountability reports of SJSU wellness services.	Relaunch SWC advisory committees. Administer the Healthy Minds survey.
2 Deliver timely, evidence-based, integrated wellness services that foster student agency and lifelong wellness for matriculated students.	Increase SWC visits to pre-pandemic levels. Comply with SB 24, Abortion by Medication. Provide on-demand counseling services in support of Title IX priorities.
3 Conscientiously steward the SWC people, resources, and operation to maximize student return on investment (ROI) from SWC education, services, and programs.	Hire key leadership roles. Complete functional integration of Shared Services SWC. Implement integrated managerial and cost accounting procedures and support digital systems. Plan SWC five-year facilities enhancement roadmap.
4 Engage new students in SWC services.	Implement wellness (mental and physical) assessment in all first-time SWC visits. Increase visits from lower division students by 20%.

## *People and Organization*

The Student Wellness Center reports to the AVP of Health, Wellness, and Student Services within the Division of Student Affairs. The senior leadership team includes the following administrators:

- Immaculate (Mai Mai) Cantos, MPH - Executive Director
- Dr. Barbara Fu, MD - Interim Medical Director
- Dr. Kell Fujimoto, PsyD - Senior Director, Well-being, Counseling & Psychological Services
- Chavon Allison, PsyD(c) - Director of Care Experience and Operations

The SWC is a self-supported unit that is funded by a mix of student fees and fees for augmented services. The SWC manages the following funds.

#### *Health Fee Fund*

The Health Fee fund serves as the primary operating fund for student fees and SWC services.

As experienced in 2021/22, student engagement with SWC services is steadily recovering toward pre-pandemic levels. Last year, COVID-19 vaccination policy compliance, positive case management, and required operational changes continued to place an exceptional demand on operational capacity.

The 2022/23 budget reflects the onboarding and filling of several positions during the year. Contracted service providers will also support the operational needs of psychiatry and organizational management as needed. The budget includes an investment in Point and Click Solutions for electronic health records management, and ongoing laboratory, pharmacy, imaging, and clinic supplies. Based on the plan's assumptions, reserves are anticipated to decrease by \$3.4 million over the course of 2022/23, which will bring the fund's balance to below the six-month reserve maximum by the end of the year.

#### *Fee for Augmented Services Fund*

The Fee for Augmented Services fund receives revenue and expenses generated from augmented services that are not included in typical subscriber services funded by the Health Fee. Augmented services include special examinations, immunizations, and prescriptions. Planned changes to the Point and Click electronic health records system will enable more detailed service reporting for these activities and accurate costing, which will support the appropriate cost recovery for services performed by other funds.

#### *Health Facility Fee Fund*

The Health Facility Fee fund supports the Student Wellness Center facility - the maintenance, debt service on the Systemwide Revenue Bond issued for the building's construction, as well as facility maintenance and improvement projects. Over the coming three years, the SWC intends to invest in several facilities enhancement projects. The projects will update the infrastructure for hybrid education and engagement, provide chaperone capability, and create more confidential administrator spaces and more private consultation space for pharmacy. In later years, the SWC looks to redesign reception and waiting spaces to align with integrated operations; complete environmental enhancements to reinforce wellness; build an optometry clinic. The accounting of these projects will be recorded in the capital improvements or non-recurring maintenance and repair funds per CSU guidelines, with funding from the Health Facility Fee fund. Despite these planned facilities projects, the Health Facility Fee balance is projected to be above the reserve target of six months of expense. The SWC will continue to explore ways to manage long-term reserves, commitments, and anticipated fee revenues

**Student Wellness Center (SWC)  
2022/23 Budget**

	Health Services (incl Mental Health)	Augmented Health Services (Fee for Service)	Health Facility	Capital Improv / Maint & Repair	Total
<b>Revenues</b>					
Student Fees	\$12,783,928	\$150,000	\$2,420,699		\$15,354,627
Interest	\$314,565	\$14,618	\$215,600		\$544,783
<b>Total Revenues</b>	<b>\$13,098,493</b>	<b>\$164,618</b>	<b>\$2,636,299</b>	<b>\$0</b>	<b>\$15,899,410</b>
<b>Expenses</b>					
Salaries	\$8,198,361	\$0			\$8,198,361
Benefits	\$4,168,170				\$4,168,170
Subtotal	\$12,366,531	\$0	\$0	\$0	\$12,366,531
Operating Expenses & Equipment	\$2,784,061	\$1,500	\$10,324	\$72,468	\$2,868,353
SJSU Overhead / CSU Chargebacks	\$1,341,851	\$18,067	\$653,359		\$2,013,277
<b>Total Expenses</b>	<b>\$16,492,443</b>	<b>\$19,567</b>	<b>\$663,683</b>	<b>\$72,468</b>	<b>\$17,248,161</b>
Repairs & Maintenance Transfers					\$0
Capital Improvement Transfers					\$0
Debt Service Payments			(\$1,029,873)		(\$1,029,873)
<b>Net Revenue (Expense)</b>	<b>(\$3,393,950)</b>	<b>\$145,051</b>	<b>\$942,743</b>	<b>(\$72,468)</b>	<b>(\$2,378,624)</b>
<b>Prior Year Fund Balance</b>	<b>\$8,431,034</b>	<b>\$819,202</b>	<b>\$8,719,331</b>	<b>\$3,035,900</b>	<b>\$21,005,467</b>
<b>Projected Ending Fund</b>	<b>\$5,037,084</b>	<b>\$964,253</b>	<b>\$9,662,074</b>	<b>\$2,963,432</b>	<b>\$18,626,843</b>

Footnotes:

For details regarding Student Health programs, visit: <http://www.sjsu.edu/studenthealth/>

## UNIVERSITY HOUSING SERVICES

University Housing Services (UHS) strives to create a residential community that supports and enhances academic success, fosters the learning and development of our students, and promotes student involvement and civic engagement. Housing practices promote efficiency, operational effectiveness, and fiscal responsibility. UHS currently hosts approximately 3800 students.

UHS is comprised of Residential Life (including Faculty in Residence), Administration and Financial Operations, Organization and Planning, and Facilities Operations (Custodial). Housing revenue is generated from the following sources:

- Room rent (students and faculty/staff);
- Conferences (overnight guests, conference groups, and interns);
- Rent from Chartwells for the use of the Dining Commons, rent and utilities for the use of the Village Market; and
- Damage fees, application fees, late fees, license processing fees, parking fees from CV garage.

### *2021/22 Accomplishments*

Housing implemented some additional security measures for our residential buildings and rooms:

- With the help of our Facilities staff, Residential Life staff, and administrative staff working hybrid schedules, we were able to keep our Housing department open for the 2021/22 Academic year and successfully manage the positive COVID-19 cases we had throughout the year.
- Our Residential staff, Faculty in Residence, and housing student organizations were able to provide educational and social virtual programming and some smaller in-person events that helped to engage our residents during this difficult time.
- Housing continued the additional cleaning and other health and safety measures requested by state and campus health officials to address the continuing impact of COVID-19.
- We also implemented COVID testing throughout the academic year after our residents came back from major holidays or breaks which helped us detect and address any positive cases quickly.

### *2022/23 Housing Budget*

University Housing Services is slowly getting back to normal occupancies, which will also bring some challenges:

- The 2021/22 UHS year-end balance was \$13.9 million with much of this earmarked for various deferred maintenance projects with more residents living on-campus.
- Housing, like other departments, on-campus is struggling in filling vacant positions and retain some staff, especially since we are transitioning back to in-person work.
- We have allocated \$35 million to start renovating our Joe West high-rise (50+ years old). \$7 million will be budgeted each year, in addition to the \$2 million for other deferred maintenance projects.

**University Housing Services  
2022/23 Budget**

**Revenues**

Student Housing Rent	\$47,181,000
Conference and Overnight Guests	\$380,000
Other Revenues	\$205,000
Miscellaneous Student Fees	\$714,400
Auxiliaries Rent Revenues	\$294,256

<b>Total Revenues</b>	<b><u>\$48,774,656</u></b>
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**Expenses**

**Salary and Benefits**

Salaries and Wages	\$4,533,878
Benefits	\$3,249,769
Student Assistants	\$1,343,555

<b><u>\$9,127,202</u></b>
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**Operating Expenses & Equipment**

General Supplies/Services	\$4,365,767
Equipment/Furniture Replacement	\$505,350
Insurance Premiums	\$741,816
Internet/Cable (UTS)	\$1,243,444
Repairs, Maintenance & FD&O Services	\$5,817,657
Utilities	\$3,011,595
Business Services	\$257,434
CSU Centrally Paid Costs	\$209,670
Ground Lease Fees	\$342,953
Security (UPD)	\$643,654
Debt Service <sup>(a)</sup>	\$17,438,820

<b><u>\$34,578,160</u></b>
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<b>Total Expenses</b>	<b><u>\$43,705,362</u></b>
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Transfer in from Parking for CV Parking Costs	\$490,376
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Transfer out to Housing Maintenance and Repair Fund	(\$6,436,123)
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<b>Net Revenue (Expense)</b>	<b><u>(\$876,453)</u></b>
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<b>Prior Year Fund Balance</b>	<b>\$13,864,863</b>
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<b>Projected Ending Fund Balance <sup>(b)</sup></b>	<b>\$12,988,410</b>
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Footnotes:

<sup>(a)</sup> Systemwide Revenue Bond (SRB) debt for Campus Village I and II.

<sup>(b)</sup> Reserves for housing maintenance and repair, construction, and future debt service payments.

For details regarding University Housing Services, visit: <http://www.housing.sjsu.edu/>

## UNIVERSITY PARKING SERVICES

University Parking Services generates its revenue through parking permit sales and parking citation fines. Parking Services is comprised of three divisions: Business Administration, Parking Enforcement, and Shuttle Operations. Parking permits are currently sold to employees, students, and visitors over the counter, online, and through automated pay stations. Parking revenues are used for parking operations and enforcement costs, improvements, maintenance and repair to existing facilities, and alternative transportation programs.

### *Highlights of Current Year 2022/23 Budget*

Parking Services is anticipating a brighter revenue forecast for the fiscal year 2022/23. Parking revenue should conservatively increase by 40% in fiscal 2022/23. This increase is attributed to the relaxing of Social Distancing Protocols due to the substantial decrease in COVID-19 throughout the state and country. As the campus anticipates a return to more normal operations in the 2022/23 academic year. Many of these returning faculty, staff, and students are anticipated to return to campus in Single Occupancy Vehicles (SOVs) thus increasing demand on our campus parking inventory.

Parking Services implemented its comprehensive plan to facilitate event parking on Main and South Campus utilizing virtual permitting. By leveraging web-based technologies and applications, such as T2 and ParkMobile we developed systems that eliminated the need for the pay-at-gate collection process and mitigated the large traffic jams that this process created during events.

Parking Services experienced great success through the deployment of its Events Logistics Plan by instituting an expanded Parking Event Fee rate program. The new events logistics plan allows Parking Services to mitigate challenges to our campus transportation system brought on by environmental impacts associated with special events. Further expansion of this program will possibly allow Parking Services to mitigate stresses on the transportation system by instituting "Demand Pricing" which levies additional fees for events that are scheduled during periods of heavy campus traffic/parking demand. There are other financial growth opportunities for Parking Services such as compensation for parking utility losses due to construction, asset relocation, and campus events.

**University Parking Services  
2022/23 Budget**

	Parking Fees	Fines & Forfeitures	Capital Projects	Special Events	Total
<b>Revenues</b>					
Parking Permits	\$6,754,000				\$6,754,000
Parking Coingates	\$433,000				\$433,000
Parking Fines		\$345,000			\$345,000
Revenue-Others	\$1,792,190				\$1,792,190
Interest	\$50,000	\$500			\$50,500
Cost Recovery from Auxiliaries	\$35,000			\$10,000	\$45,000
Cost Recovery from Others	\$80,000				\$80,000
<b>Total Revenues</b>	<b>\$9,144,190</b>	<b>\$345,500</b>	<b>\$0</b>	<b>\$10,000</b>	<b>\$9,499,690</b>
<b>Expenses</b>					
Salaries & Wages	\$1,328,376	\$25,000		\$7,000	\$1,360,376
Benefits	\$979,459			\$500	\$979,959
	<b>\$2,307,835</b>	<b>\$25,000</b>	<b>\$0</b>	<b>\$7,500</b>	<b>\$2,340,335</b>
<b>Operating Expenses &amp; Equipment</b>					
Charges for Business Services	\$731,535	\$27,600		\$800	\$759,935
Contractual Services	\$160,585	\$250,000			\$410,585
Communications	\$2,000				\$2,000
Equipment	\$125,474				\$125,474
General Operating Expenses	\$688,893	\$10,000			\$698,893
Printing/Duplicating	\$3,000				\$3,000
Facility Upkeep	\$733,723				\$733,723
Utilities	\$240,850				\$240,850
Merchant's Credit Card Fee	\$150,000				\$150,000
Insurance & Risk Expenses	\$232,281				\$232,281
UPD Security	\$1,169,456				\$1,169,456
	<b>\$4,237,797</b>	<b>\$287,600</b>	<b>\$0</b>	<b>\$800</b>	<b>\$4,526,197</b>
<b>Total Expenses</b>	<b>\$6,545,632</b>	<b>\$312,600</b>	<b>\$0</b>	<b>\$8,300</b>	<b>\$6,866,532</b>
<b>Transfers In (Out)</b>					
Debt Service	(\$2,319,297)				(\$2,319,297)
<b>Total Transfers In (Out)</b>	<b>(\$2,319,297)</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>(\$2,319,297)</b>
<b>Net Revenues (Expenses)</b>	<b>\$279,261</b>	<b>\$32,900</b>	<b>\$0</b>	<b>\$1,700</b>	<b>\$313,861</b>
<b>Prior Year Fund Balance</b>	<b>\$1,974,003</b>	<b>\$15,952</b>	<b>\$2,462,294</b>	<b>\$56,492</b>	<b>\$4,508,741</b>
<b>Projected Ending Fund Balance</b>	<b>\$2,253,264</b>	<b>\$48,852</b>	<b>\$2,462,294</b>	<b>\$58,192</b>	<b>\$4,822,602</b>

## Auxiliary Organizations

Associated Students

Research Foundation

Spartan Shops, Inc.

Student Union, Inc.

Tower Foundation

## ASSOCIATED STUDENTS

The Associated Students San José State University's mission is to support and represent the students of San José State University by continuing the organization's legacy of student advocacy and leadership; to enhance SJSU students' education through high-quality programs and services, and to prepare students as they move towards a thoughtful and purposeful life after graduation. Our core functions are described below.

### *Student Government (Government, Scholarships, Affordable Book Vouchers)*

Represent the students of San José State University through participation in campus governance activities with a focus on fostering student advocacy and leadership development while supporting the University's academic mission. Provide scholarships and financial support to student academic projects and organizations.

### *Engagement and Community Building (CCCAC, Events)*

Cultivate and engage all students through high-quality educational, social, and cultural programs. Provide co-curricular experiences through civic engagement, service learning, and leadership. Offer opportunities for students that encourage personal growth and development.

### *Students Support (Child Development, General Services, and Print & Technology Center)*

Fulfill the service needs of students by providing supplemental programs including quality child care; full, self-print, and copy services; course reader distribution; electronic bill payment; and funds management for recognized student organizations. Provide students with a full-service computer lab where they can complete homework and research assignments, use multiple operating systems, and explore a variety of course-related and leisure software.

### *Sustainable Transportation Services (Transportation Solutions)*

Transportation Solutions (TS) aims to reduce the impact on the University's parking facilities and traffic to San José State University by promoting alternatives to driving alone. TS is dedicated to serving students and employees' commute needs at SJSU and provides sustainable and affordable commute programs and services that make it easy for individuals to travel to and around campus. These alternatives include a deeply discounted university transit pass, discounted regional transit passes, carpool matching, trip planning, and secure bicycle parking.

### *Organizational Health (Admin, HR, Marketing, Finance)*

Optimize A.S.'s organizational health and sustainability to strengthen our contributions to San José State students. Provide employment opportunities to students, training, and experiential learning. Develop long-term marketing and communications plans to share A.S.'s purpose, mission, and services with the campus community.

**Associated Students  
2022/23 Budget**

**Revenues**

Department of Education contracts & Parent fees	\$1,786,499
UPD Grant	\$95,200
A.S. Activity Fees	\$6,557,929
Reserve Funding	\$541,750
Department Program /Print Shop Revenue	\$500,328
Interest Income	\$55,000
<b>Total Revenues</b>	<b><u>\$9,536,706</u></b>

**Expenses**

Salaries & Wages	\$2,805,795
Student Assistants	\$1,716,545
Stipends	\$127,640
Payroll Taxes	\$225,694
Fringe Benefits	\$821,418
<b>Total Salaries &amp; Benefits</b>	<b><u>\$5,697,092</u></b>

Staff Development & Support	\$77,483
Hospitality	\$23,195
Smart Pass	\$1,321,080
Operating /Supplies Expenses	\$596,515
Rental	\$225,158
Utilities	\$65,400
Property Tax	\$5,236
University Charges	\$304,740
Fees, Contracts & Services, Repairs	\$378,670
Transportation Demand Management (TDM) Project	\$128,250
Licenses and Artist Fees	\$89,149
Audit/Accounting/Legal	\$109,240
Bank Charges /Merchant	\$27,030
Insurance	\$87,514
Food Services	\$92,045
Travel/ITS	\$115,476
Student Organization & Spartan Community Funding	\$180,000
Capital Outlay & Equipment	\$20,000

**Total Operating Expenses & Equipment** **\$3,846,181**

**Total Expenses** **\$9,543,273**

**Net Operating**

**(\$6,567)**

Depreciation \$261,549

OPEB \$225,000

AS House Rent \$148,430

**Change in Net Assets**

**(\$641,546)**

## RESEARCH FOUNDATION

The San José State University Research Foundation (SJSURF) is a 501(c)(3) nonprofit corporation and an auxiliary of the University. As an integral part of the Division of Research and Innovation, the SJSURF provides administrative and business support to the campus research enterprise. In doing so, we are continually inspired by our principal investigators' intellect, creativity, and dedication, who explore groundbreaking scientific theories, conduct progressive engineering research, and lead initiatives that transform the community.

### *SJSURF activities:*

- Supporting faculty success by promoting, developing, and managing sponsored programs. Supporting the development of intellectual property by acting as the university's exclusive agent for technology commercialization.
- Expanding student horizons by promoting student involvement in sponsored programs. Developing unique opportunities for student research with faculty mentors and seeking student internships in local businesses, industry, professional organizations, and public agencies.
- Delivering specialized business services by administering funds for campus programs

Today the Research Foundation employs nearly 1,000 people and has annual revenues of nearly \$60 million. This federal, state and private funding supports SJSU's expanding research enterprise, placing San José State among the top 225 universities in the country for total R&D expenditures.

Program sites are located on the SJSU main campus, Moss Landing Marine Laboratories, NASA-Ames Moffett Field, and several national and international locations.

**Research Foundation  
2022/23 Budget**

**Revenues**

Fees	\$8,282,659
Investment Income	\$1,600,000
Grants and Contracts	\$39,951,000
Other Revenue Activities - Campus Organizations <sup>(a)</sup>	\$3,500,000
Other Revenue and Support	\$1,100,000

**Total Revenues** \$54,433,659

**Expenses**

**Salary and Benefits**

Salary and Wages	\$29,025,000
Staff Benefits	\$8,277,500
	<u><u>\$37,302,500</u></u>

**Operating Expenses & Equipment**

Depreciation	\$1,500,000
Equipment Purchase	\$530,000
Equipment Rent and Lease	\$175,000
University Admin. Services & Facilities Use	\$410,000
Occupancy (Rent, Janitorial, Utilities, Insurance)	\$1,400,000
Printing	\$20,000
Building Repairs and Maintenance	\$120,000
Scholarships and Fellowships	\$1,500,000
Supplies	\$1,250,000
Telephones/Communications	\$480,000
Travel	\$600,000
Contracted Services and Fees <sup>(b)</sup>	\$6,300,000
Professional Fees (Accounting and Legal)	\$400,000
Net Alloc/Grants/Transfers to Related Entities	\$2,500,000

\$17,185,000

**Total Expenses** \$54,487,500

**Net Revenue (Expense)**

(\$53,841)

**Prior Year Fund Balance**

**\$24,089,369**

**Projected Ending Fund Balance**

**\$24,035,528**

Footnotes:

<sup>(a)</sup> Campus organization activity represents funds received and administered by the Foundation on behalf of the University.

<sup>(b)</sup> Contracted services and fees are grants and contracts or subcontracted to other universities, organizations, and individuals.

For more information about Research Foundation finances, operations, etc., visit <http://www.sjsu.edu/researchfoundation>

## SPARTAN SHOPS, INC.

Spartan Shops, Inc. (SSI), a 501(c)(3) nonprofit organization, was founded in 1956 to benefit the San José State University (SJSU) campus. The core purpose is providing quality support services to the campus community.

The 2021/22 year launched Phase 4 of the SJSU Adapt Plan, which kicked off the gradual repopulation of the campus. This school year continued to be a financial struggle as result of the ongoing effects of the COVID-19 pandemic, which led to more virtual instruction options and in turn decreased the anticipated foot traffic on campus. The student population inclemently increased, but continued to impact Dining Services and the Bookstore. In order to be able to sustain the increase in food costs and labor in Dining Services, SSI sought approval for a 5% increase to the Meal Plan Rates, which aligned with the Housing rate increases. The proposal was approved to be implemented in 2022/23 year, which will mitigate some loss due to rising operational costs. On campus housing ended 2021/22 at an 84% occupancy rate, which has helped in the process of recovering from the vast financial losses in 2020/21 via Meal Plans.

From 2022/23 and beyond, SSI will continue the path to financial recovery under current circumstances of full repopulation, conditions, and liabilities. Chartwells is the primary revenue generator as business returns to normal. However, it may require an expansion of commercial services and operations to create additional revenue streams for Spartan Shops to become more financially stable.

Spartan Shops is comprised of three major divisions:

### *Dining Service Management*

The Chartwells food service agreement was extended in 2021/22 to June 30, 2025. SSI originally projected the end of the Management Fee structure in 2020/21. However, the Management Fee arrangement ended on June, 30 2022. Therefore, the Profit & Loss (P&L) arrangement began on July 1, 2022.

As a result of the shift to P&L, SSI will earn commission on Chartwells gross sales, which is projected to be \$2.3 million for the 2022/23 year. Note that utilities expenses are expected to continue to rise and SSI owned equipment is aging. Therefore, there are anticipated increased costs in these two areas that will affect SSI's net position in 2022/23.

There are some exciting new projects scheduled for this year. Rather than an expensive/corporate new Starbucks that was previously planned to be added to the MLK Library, on the university side, we are in negotiations with a local, minority owned coffee establishment to re-engage in the previous "On 4<sup>th</sup>" space. Halal Shack is a brand new concept that replaced the Steak and Shake, bringing faster service and more flavorful options.

### *Bookstore Management*

Similar to the above, during 2021/22 the Barnes & Noble Bookstore continued to be impacted by less students and foot traffic on campus. However, sales did increase with the gradual repopulation, which resulted in \$520 thousand in commissions.

In 2022/23, with less limitations on normal operations and larger student populations on campus, commissions are projected at \$583 thousand.

### *Real Estate*

SSI has 13 off-campus units at 20% below market rate, which is available only to faculty and staff. In 2021/22, 2 units were successfully remodeled under budget and rented immediately. There is an increased interest in the properties as the campus continues to repopulate.

Repair and maintenance expenses were kept to a minimum, remaining within the budgeted amount. Spartan Shops continues to receive payment for management of the President's residence.

In 2022/23, deferred maintenance will need to be addressed as well as some small-scale remodeling as a result of the age of the units. SSI is also in the process of hiring a property management firm to assist with the management of the units.

**Spartan Shops, Inc.**  
**2022/2023 Budget**

**Resources**

**Sales**

Real Estate Rental Income	\$291,010
Total Sales	<b>\$291,010</b>
<b>Gross Profit</b>	<b>\$291,010</b>

**Other Income**

Bookstore Commission	\$583,000
Dining Services Revenues	\$2,382,987
Management Income	\$49,500
Interest Income	\$34,560
Misc Income	\$955,979
Total Other Income	<b>\$4,006,026</b>

**Total Resources** **\$4,297,036**

**Operating Expenses**

Salary & Benefits	\$21,000
Depreciation	\$1,169,322
Repair & Maintenance	\$280,000
Utilities	\$601,566
University Donations	\$16,000
Services	\$918,659
Equipment	\$2,000
Facility Fee - University	\$222,449
Insurance	\$88,437
Bank Service Charge	\$7,700
Tax and Licenses	\$7,500
Other Expenses	\$11,035
Dining Services Subsidy	\$0
<b>Total Operating Expenses</b>	<b>\$3,345,669</b>

**Net Gain (Loss) per P&L** **\$951,367**

**Prior Year Fund Balance per P&L** **\$2,741,987**

**Projected Ending Fund Balance per P&L** **\$3,693,354**

# STUDENT UNION, INC.

The Student Union of San José State University is a California State University auxiliary organization that began its operations in October 1969 and became incorporated in March 1982. Student Union, Inc. manages and operates three major facilities at SJSU: the Diaz Compean Student Union Building with its new East and West expansions, the Provident Credit Union Event Center Building, and the Spartan Recreation and Aquatic Center, which opened in April of 2019. Students interact with the Student Union, Inc. daily through the use of facilities, and participation in sponsored events, through Student Union, Event Center, and Spartan Recreation programs. The Student Union also acts as a bridge to the greater campus community, offering the use of recreational facilities, diverse concerts, and events on campus.

The Student Union is governed by a Board of Directors composed of fourteen (14) voting members:

- Students – Eight (8)
- Faculty – Two (2)
- Ex-Officio Directors – Three (3), VPAF, VPSA, AS President or their designee
- Community Member – One (1)

Revenue sources include the Funded Budget for Operations, as well as revenues earned from various services offered, and external rental of the facilities. These revenues support the costs of programming and operating the facilities, and minor capital projects.

Services listed below include the Diaz Compean Student Union, Spartan Recreation and Aquatic Center, Provident Credit Union Event Center, and the SU ATM Building:

STUDENT UNION BUILDING	EVENT CENTER/SPORT CLUB	SPARTAN RECREATION AND AQUATIC CENTER	ATM BUILDING
SU Ballroom SU Theatre Union Square Food Court AS Print & Technology AS Government Offices Spartan Bookstore Student Involvement Veterans Resource Center Gender Equity Center PRIDE Center MOSAIC Cross-Cultural Center Cesar Chavez Community Action Center Chicanx/Latinx Student Success Center African American/Black Student Success Center Center for Asian Pacific Islander Student Empowerment (CAPISE) IDEA Lab US Bank Starbucks Bowling and Billiards Center	Arena - Technical & AV Box Office/TM Outlet Dance Studios Weight Room Mini - Gym	Club Sports Outdoor Adventures Intramurals Climbing Wall Fifty Meter Pool Recreation and Leisure Pool Multi-Activity Court Weight Rooms Fitness Classes Running Track Three Court Gym	Bank of America Bank of the West Wells Fargo Bank JP Morgan Chase Bank

**Student Union, Inc.**  
**2022/23 Operating Budget**

	Student Union	Event Center	SRAC	Total
<b>Revenues</b>				
Funded Budget for Operations	\$9,368,624	\$664,595	\$4,345,369	\$14,378,587
Reimbursement of Event Costs		\$69,120		\$69,120
Interest Income	\$100,000			\$100,000
Rental Income	\$22,465	\$170,500	\$12,000	\$204,965
Program Revenues	\$196,875		\$367,734	\$564,609
<b>Total Operating Revenues</b>	<b>\$9,687,964</b>	<b>\$904,215</b>	<b>\$4,725,103</b>	<b>\$15,317,281</b>
<b>Expenses</b>				
Salaries and Wages	\$4,944,665	\$512,057	\$2,866,918	\$8,323,640
Staff Benefits	\$2,020,214	\$88,852	\$635,219	\$2,744,285
<b>Total Salaries &amp; Benefits</b>	<b>\$6,964,879</b>	<b>\$600,909</b>	<b>\$3,502,137</b>	<b>\$11,067,925</b>
<b>Operating Expenses &amp; Equipment</b>				
Travel	\$66,884	\$11,303	\$34,993	\$113,180
Risk Coverage/Insurance	\$82,140	\$36,000	\$74,520	\$192,660
Supplies	\$279,368	\$70,377	\$219,862	\$569,607
Communications	\$383,313	\$550		\$383,863
Repairs and Maintenance	\$230,300	\$20,193	\$12,400	\$262,893
Programming Costs	\$552,130	\$9,940	\$22,910	\$584,980
Utilities	\$12,000	\$12,000		\$24,000
Small Equipment Purchases	\$50,274		\$21,000	\$71,274
Services from Outside Agencies	\$950,006	\$142,943	\$786,530	\$1,879,479
Staff Development & Other	\$116,670		\$50,751	\$167,421
Depreciation	\$700,000			\$700,000
<b>Total Operating Expenses</b>	<b>\$3,423,085</b>	<b>\$303,306</b>	<b>\$1,222,966</b>	<b>\$4,949,357</b>
<b>Total Expenses</b>	<b>\$10,387,964</b>	<b>\$904,215</b>	<b>\$4,725,103</b>	<b>\$16,017,282</b>
<b>Operating Income (Loss)</b>	<b>(\$700,000)</b>	<b>(\$0)</b>	<b>(\$0)</b>	<b>(\$700,000)</b>
Capital Updates	\$355,500	\$267,000	\$27,500	\$650,000

Footnotes:

Capital updates were included below the line and funding was provided to cover the costs.

## TOWER FOUNDATION

The Tower Foundation, formed in 2004, is San José State University's philanthropic auxiliary. The Tower Foundation makes it possible for San José State University to unite with our community of alumni, students, faculty, friends, and corporations to make a college education possible for our talented students. Philanthropy is helping San José State University (SJSU) do things it could not accomplish without donor support.

Through membership on Tower Foundation's board of directors, SJSU engages prominent alumni and citizens in the life of the university. Board members play a critical role in advising the President on shaping philanthropic strategy, community partnerships, and campus issues. They work closely with university leadership to reach out to alumni and businesses to build commitment and funding for San José State. Comprised of up to 43 community members, most of whom are SJSU alumni, board members are appointed for three-year terms. San José State University's President and Vice President for Advancement serve as ex-officio members.

SJSU has a large, loyal alumni base, and their donations as well as those from parents, businesses, private foundations, and other organizations, have demonstrated the shared belief that high-quality public education is the main source of an educated and prepared workforce. SJSU powers Silicon Valley and anchors the nation's tenth-largest city, providing more graduates to high-tech employers than any other institution of higher education. This vital partnership creates opportunities for future collaboration both inside and outside of the classroom.

One of the most important factors in achieving distinction is a sizable endowment – built by people who are committed to the hands-on education we provide and the opportunities it creates for our students. A large endowment provides student educational experiences and faculty research opportunities that would not be possible without it. The endowment also provides scholarship support to deserving students, making it possible for students to graduate with less student loan debt. As the endowment grows, endowment distributions provide an income stream that can create the critical margin of excellence that will enable SJSU to continue to provide the highly educated workforce required to fuel the economic engine that is Silicon Valley.

Tower Foundation's \$200 million endowment is comprised of over 600 individual endowment funds. Tower Foundation works with Beacon Pointe Advisors, its portfolio consultant, and manager of managers, to allocate endowment assets to a diversified portfolio of domestic and international equities, fixed income, real estate, private equity, and other investments. The Foundation remains confident that its endowment investment portfolio is positioned for the long term, from both a risk and a return standpoint, but short term concerns due to the uncertainty in the markets warrant additional prudence. Financial market conditions over the past year and continuing economic and worldwide events may cause Tower Foundation to reduce or eliminate endowment distributions to preserve the corpus.

**Tower Foundation  
2022/23 Budget**

<b>Revenues</b>	
Gifts, Pledges & Bequests	\$26,200,000
Nonmonetary Gifts	\$500,000
Other Investment & Non-operating Revenues <sup>(a)</sup>	\$3,500,500
<b>Total Revenues</b>	<b>\$30,200,500</b>
<b>Expenses</b>	
<b>Tower Operating Expenses</b>	
Tower Operating Expenses	<b>\$4,416,369</b>
<b>Tower Program Distributions</b>	
SJSU Program Activities <sup>(b)</sup>	\$14,800,000
SJSU Endowment Distributions <sup>(c)</sup>	\$5,000,000
SJSU Outreach Funds <sup>(d)</sup>	\$150,000
	<b>\$19,950,000</b>
<b>Restricted Funds &amp; Reserves</b>	
Restricted Endowments	\$3,500,000
Restricted Pledges & Bequests	\$1,500,000
Operating & Campaign Reserves	\$834,131
	<b>\$5,834,131</b>
<b>Total Expenses</b>	<b>\$30,200,500</b>
<b>Net Revenue of Expenses</b>	<b>\$0</b>
<b>Prior Year Fund Balance</b>	<b>\$233,667,128</b>
<b>Projected Ending Fund Balance</b>	<b>\$233,667,128</b>

Footnotes:

<sup>(a)</sup> Non-operating income is from sources not part of Tower's primary business functions such as interest and investment income, gains in the fair value of the endowment portfolio, and administrative fee income.

<sup>(b)</sup> Expenses for support activities of San José State University represent the use of gift funds for scholarships, athletics and academic programs of the campus.

<sup>(c)</sup> Endowment distribution represents payment from endowments to support scholarships, academic programs, and athletics.

<sup>(d)</sup> Community relations funds providing support to SJSU leadership for outreach activities.

For more information about Tower Foundation, visit <http://www.sjsu.edu/towerfoundation>.

## Appendix

Student Enrollment and Fees

Glossary of Budget Related Terms

Organizational Charts By Division

## STUDENT ENROLLMENT AND FEES

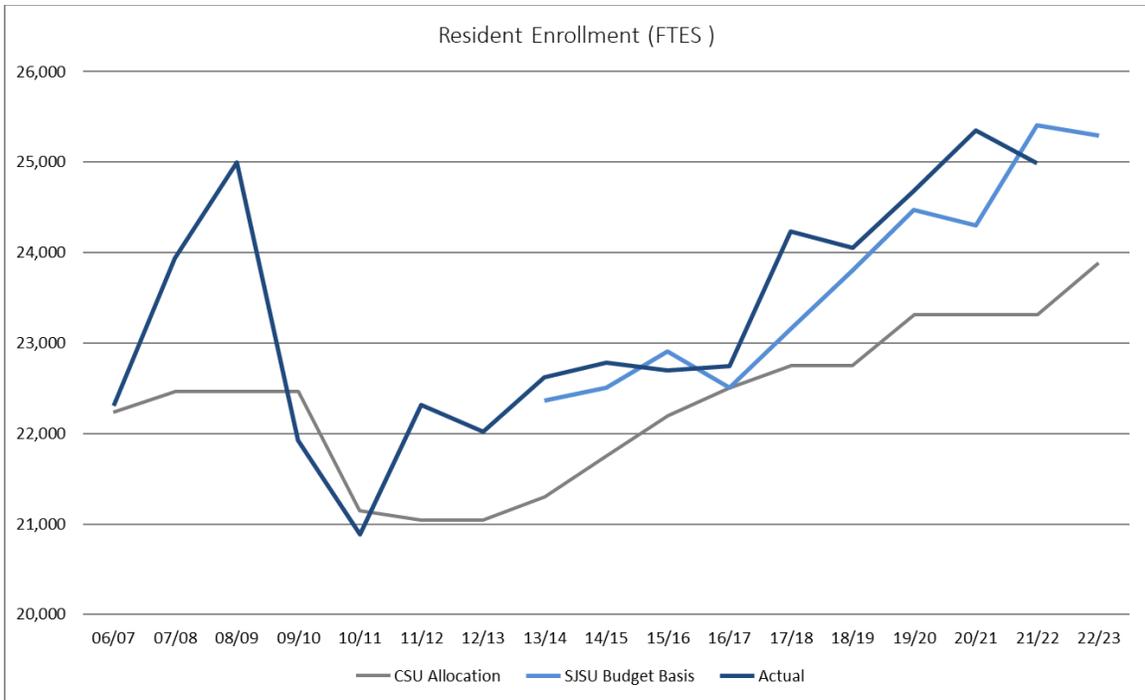
Student enrollment informs the CSU's budget allocations from the State and resource planning efforts for both operating budgets and capital outlay plans. The CSU's enrollment planning cycle begins in fall for the following fiscal year and results in a systemwide enrollment level incorporated into the annual Board of Trustees' Support Budget. College-year enrollment targets for each campus are jointly determined by the chancellor and campus presidents and include state-supported summer term enrollments. Targets are referenced in terms of Full Time Equivalent Students (FTES), which are based of 15 units of coursework for undergraduate and postbaccalaureate students and 12 units of coursework for graduate students seeking master's or doctoral degrees. The Average Unit Load (AUL) is a closely followed student metric. The CSU Graduation Initiative 2025 and efforts at SJSU have encouraged students to achieve a higher Average Unit Load (AUL) to lessen the time to degree.

### *Resident Enrollment (State-Supported)*

Over the last 15 years, resident student enrollment has fluctuated at SJSU. SJSU's enrollment allocation for funded students ("target") was essentially flat between 2006/07 through 2009/10 at approximately 22,460 FTES. In response to budget reductions, the CSU reduced enrollment targets in 2010/11 and 2011/12 to 21,045 FTES. In the following years, SJSU's resident enrollment continued to grow and consistently exceeded the target set by CSU which reached 23,316 for 2019/20. The campus anticipated continued state-funded growth and high demand from resident students and over-enrollment beyond the state-supported target referred to as "surplus" resident enrollment.

As the COVID-19 pandemic began early in 2020, the spring term of 2019/20 was already underway. Instruction was moved to a virtual modality, and enrollment remained at levels consistent with the pre-pandemic fall term. The enrollment plan for 2020/21 was modified downwards to reflect straining conditions of the pandemic but actual enrollment exceeded expectations and budget. Projections for the subsequent year, 2021/22, were modified upwards to 25,410 FTES including surplus, though the year ended lower than budgeted at 24,985 FTES.

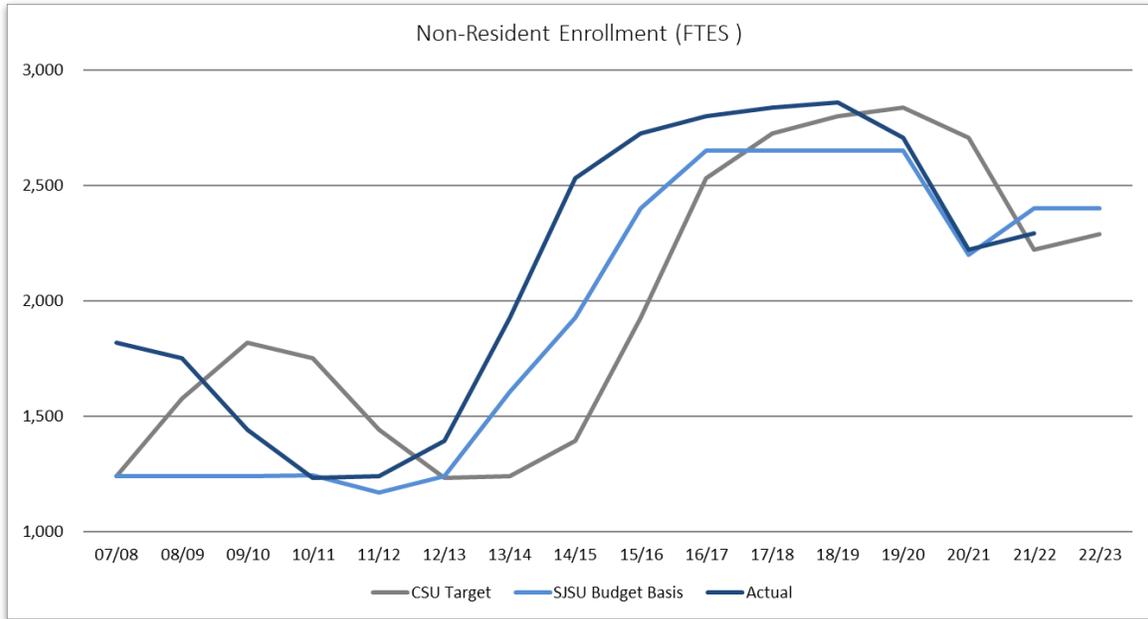
In 2022/23, the CSU increased the campus enrollment allocation by 575 FTES, which essentially moved planned enrollment from "surplus", funded with tuition fees only, to base FTES supported with General Fund and tuition fees.



*Non-Resident Enrollment (Self-Supported)*

While the CSU Operating Budget includes projections for both resident and non-resident FTES, the State funds only resident FTES. Non-resident FTES are self-supported through tuition fee and non-resident fee revenues, and the campuses have authority to set their own enrollment targets within a reasonable range. For many years, expanding non-resident enrollment has been a priority for SJSU, with heightened effort towards recruitment.

For 2020/21, a decrease of 507 (19%) non-resident FTES was planned to reflect travel restrictions or an unwillingness for international students to travel during the COVID-19 pandemic. Actual enrollments were in alignment with those planned targets, as the campus recorded 2,223 non-resident FTES. For 2021/22, the campus enrollment plan anticipated that non-resident FTES would rebound slightly, and the budget plan was based on 2,400 in base FTES, and 2,430 FTES including surplus. The final non-resident FTES reported for 2021/22 was 2,291, much lower than planned and budgeted. As a result, the non-resident budgeted enrollment for 2022/23 remains at the existing base level of 2,400 FTES, with no additional surplus enrollment budgeted.



*CSU Target and Actual FTES*

	14/15	15/16	16/17	17/18	18/19	19/20	20/21	21/22	22/23
<u>Target FTES</u>									
Resident	21,748	22,201	22,507	22,747	22,747	23,316	23,316	23,316	23,316
Non-Resident	1,927	2,400	2,650	2,650	2,650	2,650	2,200	2,400	2,400
<b>Total Target FTES</b>	<b>23,675</b>	<b>24,601</b>	<b>25,157</b>	<b>25,397</b>	<b>25,397</b>	<b>25,966</b>	<b>25,516</b>	<b>25,716</b>	<b>25,716</b>
<u>Actual FTES</u>									
Resident	22,790	22,701	22,751	24,237	24,050	24,686	25,349	24,985	
Non-Resident	2,532	2,726	2,800	2,839	2,859	2,707	2,223	2,291	
<b>Total Actual FTES</b>	<b>25,322</b>	<b>25,427</b>	<b>25,551</b>	<b>27,076</b>	<b>26,909</b>	<b>27,393</b>	<b>27,572</b>	<b>27,276</b>	

## Student Fees 2012/13 to 2022/23

Fiscal Year	Tuition Fee for Academic Year										Non-Resident Tuition Per Unit	Campus Mandatory Fees						
	Undergraduate Tuition Fee		Graduate Tuition Fees									(Academic Year fees that must be paid to apply to, enroll in, or attend SISU)						
			Non-Teacher Credential		Teacher Credential Candidates		Education Doctorate	Nursing Doctorate	Audiology Doctorate	Health Facilities		Health Services	IRA	Doc	Assoc Students	Student Union	SSETF	Total Campus Fees
	Up to 6 Units	6.1 Units or Greater	Up to 6 Units	6.1 Units or Greater	Semester/Quarter	Semester	Semester											
<b>2022/23</b>	\$3,330	\$5,742	\$4,164	\$7,176	\$3,864	\$6,660	\$11,838	\$15,270	\$14,742	\$396	\$72	\$380	\$0	\$34	\$201	\$783	\$687	\$ 2,157
<i>Change Over PY</i>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%								2.2%
<b>2021/22</b>	\$3,330	\$5,742	\$4,164	\$7,176	\$3,864	\$6,660	\$11,838	\$15,270	\$14,742	\$396	\$70	\$380	\$0	\$33	\$196	\$762	\$669	\$ 2,110
<i>Change Over PY</i>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%								0.0%
<b>2020/21</b>	\$3,330	\$5,742	\$4,164	\$7,176	\$3,864	\$6,660	\$11,838	\$15,270	\$14,742	\$396	\$70	\$380	\$0	\$33	\$196	\$762	\$669	\$ 2,110
<i>Change Over PY</i>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%								0.0%
<b>2019/20</b>	\$3,330	\$5,742	\$4,164	\$7,176	\$3,864	\$6,660	\$11,838	\$15,270		\$396	\$70	\$380	\$0	\$33	\$196	\$762	\$669	\$ 2,110
<i>Change Over PY</i>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%								2.7%
<b>2018/19</b>	\$3,330	\$5,742	\$4,164	\$7,176	\$3,864	\$6,660	\$11,838			\$396	\$68	\$364	\$0	\$32	\$192	\$744	\$654	\$ 2,054
<i>Change Over PY</i>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%			0.0%								3.8%
<b>2017/18</b>	\$3,330	\$5,742	\$4,164	\$7,176	\$3,864	\$6,660	\$11,838			\$396	\$120	\$295	\$0	\$31	\$185	\$717	\$631	\$ 1,979
<i>Change Over PY</i>	4.9%	4.9%	6.6%	6.5%	4.9%	4.9%	6.5%			6.5%								1.8%
<b>2016/17</b>	\$3,174	\$5,472	\$3,906	\$6,738	\$3,684	\$6,348	\$11,118			\$372	\$118	\$290	\$0	\$31	\$182	\$704	\$620	\$ 1,945
<i>Change Over PY</i>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a			0.0%								2.0%
<b>2015/16</b>	\$3,174	\$5,472	\$3,906	\$6,738	\$3,684	\$6,348	\$11,118			\$372	\$116	\$284	\$0	\$30	\$178	\$690	\$608	\$ 1,906
<i>Change Over PY</i>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a			0.0%								3.0%
<b>2014/15</b>	\$3,174	\$5,472	\$3,906	\$6,738	\$3,684	\$6,348	\$11,118			\$372	\$113	\$276	\$0	\$30	\$172	\$670	\$590	\$ 1,851
<i>Change Over PY</i>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a			0.0%								-1.1%
<b>2013/14</b>	\$3,174	\$5,472	\$3,906	\$6,738	\$3,684	\$6,348				\$372	\$111	\$272	\$0	\$30	\$169	\$659	\$630	\$ 1,871
<i>Change Over PY</i>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				0.0%								12.9%
<b>2012/13</b>	\$3,174	\$5,472	\$3,906	\$6,738	\$3,684	\$6,348				\$372	\$109	\$253	\$0	\$30	\$147	\$648	\$470	\$ 1,657
<i>Change Over PY</i>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				0.0%								21.1%

Note: Inflationary adjustments were suspended for FY2020/21-2021/22 during the COVID-10 pandemic.

## GLOSSARY OF BUDGET RELATED TERMS

**Academic Year:** Refers to the time period beginning with the fall semester and ending with the spring semester.

**Annualized Full Time Equivalent Student (FTES):** Fall FTES added to Spring FTES divided by two plus ½ Summer FTES. Equivalent to College Year FTES.

**Average Unit Load (AUL):** This number is an indicator of average course load for students. While a Full Time Equivalent student is considered any student with a unit load of 6.1 or greater, the financial implications of a student taking 6.1 units versus 15 is significant. The greater the AUL on campus, the more likely a student is to be on track to graduate within CSU targeted graduation dates.

**Base Budget:** Permanent operating budget given to a unit to continuously carry out the basic, ongoing SJSU mission from one fiscal year to another.

**Benefits:** Commonly known as staff or employee benefits, such as Social Security (OASDI), retirement (PERS), health coverage, dental coverage, and vision. The benefits available to an individual are dependent upon the negotiated contract of each employee's collective bargaining unit.

**Cal Grant:** California offers grant assistance to California resident undergraduate students who meet specific eligibility requirements. Grants do not need to be repaid. Awards are available for up to four years to undergraduate students and can be extended for an additional year for those students enrolled in a teaching credential program. Eligibility is based on GPA and financial need. Cal Grants supersede State University Grants (SUG) eligibility; therefore, eligible students cannot receive both Cal Grants and SUG as both assist with tuition.

**California Dream Loan:** The CA Dream Loan is a subsidized loan program for undergraduate students with a valid CA Dream Act application and valid AB540 affidavit or "U" Visa on file with San José State University.

**California Military Department GI Bill Award Program:** Formerly the California National Guard Education Assistance Award Program, a state-funded award for eligible and active members in the California National Guard, the State Military Reserve, or the Naval Military.

**Campus Revenue Funds:** Funds generated by campus entities that provide a service to students, faculty, or staff that charge a fee that is directly related to, although not necessarily equal to, the cost of the service. Campus Revenue Funds are managed as self-supporting activities. Examples include PACE, University Housing, Intercollegiate Athletics, Lottery, Parking and Student Health Services.

**Campus Reserves Policy:** Effective October 1, 2015, the Integrated CSU Administrative Manual formalized and established a system wide policy on the creation and use of carryforward balances. It is the goal of San José State University to maintain adequate financial reserves to ensure responsible fiscal management, advance University priorities, and mitigate current and future risk.

Capital Improvement Project (CIMP): An activity that improves or alters an existing space or creates new space such as the new construction of facilities, buildings, equipment, roads, sidewalks, sewer and water systems, utility infrastructure, and grounds.

Capital Projects/Capital Outlay Program: The erection, construction, alteration, painting, repair, improvement of any structure, building, road, or other improvement of the grounds or facilities of any kind, including campus utility systems. Capital projects may be subdivided into a variety of categories based on the size of the project in dollars or the source of funds. Refer to Major Capital Outlay and Minor Capital Outlay.

CARES Act: The Coronavirus Aid, Relief and Economic Security (CARES) Act, passed by the federal government on March 27, 2020 to provide fast and direct economic aid to the American people negatively impacted by the COVID-19 pandemic. A portion of those funds was given to the Office of Postsecondary Education as the Higher Education Emergency Relief Fund, or HEERF.

College Year: A 12-month period beginning with the summer semester and followed by the fall and spring semesters.

Continuing Education: Refer to Professional and Continuing Education.

Deferred Maintenance: A backlog of maintenance for building and utility infrastructure systems. Examples include re-roofing a building, electrical repairs, plumbing repairs, and road repairs.

Discretionary Funding: Campus funding that is not mandated for a specific use. However, funding, even if designated for a specific purpose, could be designated a university resource available for allocation by the campus President.

Donor Directed Scholarships: Scholarship funding originating from off campus sources and designated for specific students by the funding agency.

Education Leadership Grant: Students admitted to the Ed.D Program in Educational Leadership may qualify for receipt of the grant monies towards the cost of attendance. Recipients must be California residents enrolled at least half-time.

Educational Opportunity Program (EOP): Provides grants, counseling and tutorial services to low-income and educationally disadvantaged undergraduate students. Recipients must be California residents who are admitted through the Educational Opportunity Program and have an Expected Family Contribution of \$5,000 or less.

Executive Order (EO): Official memo issued by the CSU Chancellor's Office to campus presidents outlining their authority to take action on their campuses.

Expected Family Contribution (EFC): A number that higher education financial aid employees apply to determine financial aid amounts for various awards. The EFC formula is established by law and is calculated based on financial information provided on the Free Application for Federal Student Aid (FAFSA).

Federal Direct Student (DL) Loan Program: Four loan programs supported by the Federal government that provide students and parents financial assistance. Stafford Subsidized is available to students with demonstrated financial

need. Subsidized loans are interest-deferred while the student is a half-time student in good academic standing. Stafford Unsubsidized loans are available to eligible students; however interest is accrued once the loan is disbursed. The Federal Parent Loan for Undergraduate Students (PLUS) program is available to parents or guardians who need assistance with the family contribution portion of a financial aid award. Interest on a PLUS loan accrues immediately and repayment begins within 60 days of the last disbursement. The Graduate PLUS is available to students pursuing a graduate level degree. Terms and interest are similar to the PLUS Loan.

Federal Pell Grants (Pell Grant): Grants, named after Senator Claiborne Pell, which do not have to be repaid and are based on financial need. They are awarded to qualified undergraduate students and students in credential programs. The Pell Grant also provides a foundation upon which other aid can be awarded. It is based on the Expected Family Contribution (EFC), which changes every year and cannot exceed \$5,846 (as of Fall 2021), and is prorated according to the number of units enrolled. The maximum award is for 6 years.

Federal Supplemental Educational Opportunity Grant (SEOG): A federal grant that provides assistance for undergraduates with exceptional financial need. This grant is a supplement to the above Pell Grant and is very limited.

Federal Work Study (FWS): Federal Funds are allocated to the campus for the purpose of hiring students with qualifying financial need. The Federal Work Study Funds cover a percent of the student's salary; the hiring campus department then "matches" the Federal Funds with a smaller percent. Typically it is a 70/30 or 75/25 split for matching funds.

Financial Aid Programs: The following types of financial aid are available from federal, state and private funding sources to assist students in meeting their educational costs. Some financial aid awards are based on financial need, scholastic achievement, and/or pre-determined attributes. Financial Aid awards at SJSU may include the following and are listed elsewhere in the glossary: Cal Grant, California National Guard Education Assistance Award, Ed.D Program – Education Leadership Grant, Graduate Business Professional Grant (GBPG), Graduate Equity Fellowship (GEF), Kuhlman Loan, Middle Class Scholarship (MCS), State University Grant (SUG), and Teacher Education Assistance for College and Higher Education (TEACH) Grant.

Fiscal Year: For the State of California, and therefore the CSU and SJSU, the fiscal year begins on July 1 and ends on June 30.

Foundation: See Research Foundation, Spartan Foundation and/or Tower Foundation.

Fund: Per CSU Executive Order 1000, a "Fund" is defined as a fiscal and accounting entity with a self-balancing set of accounts recording cash and other financial resources, all related liabilities, and residual equities or balances, and changes therein, which are segregated for the purpose of carrying on specific activities or attaining certain objectives.

General Fund: Also known as State Appropriation. Expenditure authority from the State based upon its collected and/or estimated collection of revenues. On an annual basis, a portion of the State of California General Fund revenues is identified by the governor for use by the CSU system. The Office of the Chancellor then redistributes CSU's appropriation funding to the 23 CSU campuses along with an estimate of the student fee revenues each campus is expected to collect based upon their projected student enrollment.

Graduate Business Professional Grant (GBPG): Provides grants to eligible graduate California residents enrolled in the state-supported professional master of business degree programs (MS Accountancy and MBA Master of Business Administration) and were charged the mandatory Graduate Business Professional Fee.

Graduate Equity Fellowship (GEF): The fellowship is awarded to eligible graduate California residents who meet the program criteria as established through Graduate Studies and Research.

Headcount: An inventory of staff, faculty, or students in a group taken by counting individuals.

Higher Education Emergency Relief Fund (HEERF): Through the CARES Act, the U.S. Department of Education created the Higher Education Emergency Relief Fund (HEERF) to provide funds directly to universities and students to support higher education during the COVID-19 pandemic. The campus received support from HEERF I under the initial CARES Act, support from HEERF II under the Coronavirus Response and Relief Supplemental Appropriations Act (CRRSAA), which was passed in December 2020, and support from HEERF III under the American Rescue Plan Act (ARPA), which was passed in March 2021.

Kuhlman Loan: The institutional loan program provides awards to eligible students who must be upper-division, credential or graduate with a minimum of 3.0 G.P.A.

Labor Cost Distribution: An Oracle/PeopleSoft process that distributes payroll expenditures made in the Human Resources system to designated funding sources in the Finance system. Reports can then be generated that provide employee compensation data, including the chartfield string where this data is posted in PeopleSoft Finance as expenses.

Lottery Fund: A portion of the California State Lottery proceeds is directed to the CSU and is then distributed by the Chancellor's Office to campuses.

Major Capital Outlay: Construction project where the estimated total project cost for all phases, including design and construction, is over \$929,000. State site acquisition projects, regardless of cost, are funded in major capital outlay.

Mandatory Fees: Fees that are either CSU Category I (such as tuition and an application fee) or Category II (campus mandatory fees). Campus mandatory fees include the Health Facility Fee, Health Center Operations Fee, Student Association Fee, Student Union Fee, Document Fee, Student Success, Excellence and Technology Fee (SSETF).

Marginal Cost (of Instruction): A negotiated funding standard used to quantify the incremental cost of adding one new full-time equivalent student at CSU.

Middle Class Scholarship (MCS): The scholarship is available to undergraduate and teaching credential students with family incomes and assets up to \$177,000 (as of Fall 2021). The award amount is based on the number of students' eligible statewide and funding allocated by the state budget. Awards are determined by the California Student Aid Commission.

Minor Capital Outlay: Construction project where the estimated total project cost is equal to or below \$929,000 for all phases, including design and construction.

**Non-Mandatory Fees:** Fees that are designated as CSU Categories III, IV, and V. Category III refers to miscellaneous course fees associated with a state supported course for materials and services used in course instruction. Category IV refers to fees other than Category II or III paid to receive materials, services, use of facilities, fees resulting from dishonored payments, late submissions misuse of property, or security deposits. Category V refers to fees paid to self-support programs such as extended education, parking, and housing fees.

**Non-Recurring Maintenance/Repair (NRMR):** A type of capital project that generally refers to deferred maintenance and work required to restore facilities, buildings, equipment, roads, sidewalks, sewer and water systems, utility infrastructure, and grounds to their original condition or to such condition that they can be effectively used for their intended purpose, ensuring ongoing operation of the campus. Typically, this work occurs on cycles greater than one year (and is not funded as part of the new space budget allocation).

**Non-Resident Fee:** Fee paid by non-California resident domestic and international students in addition to the tuition fee.

**One-Time Funding:** Funds allocated on a one-time basis, often for a designated project or use. Funds may be allocated in subsequent fiscal years but the funds are not intended to become a permanent addition to the recipient's base budget.

**Operating Fund:** The Operating Fund became the University's principal operating fund in 2006/07. It consists of the State Appropriation, as allocated from the Chancellor's Office, University Fees, and other Student Fees.

**Professional and Continuing Education (PaCE):** New name adopted by Systemwide Extended Education for fund previously known as Continuing Education Revenue Fund (CERF). Revenue generated from self-support degree and certificate programs, courses (credit, non-credit), and continuing education units.

**Recurring Maintenance/Repair:** A type of maintenance that typically occurs in cycles of less than one year for ongoing, routine operations and maintenance of buildings and equipment. The work is necessary to keep facilities, buildings, equipment, roads, sidewalks, sewer and water systems, utility infrastructure, and grounds in good repair, appearance and operating condition.

**Research Foundation:** San José State University Research Foundation provides expertise and business infrastructure necessary to conduct San José State University research, community partnerships and education related initiatives.

**Revenue Funds:** Self-supporting funds that generate their own revenue independent of the State's appropriation to the campus. These funds operate under the direct supervision of the campus Vice Presidents. Examples are Student Health Services, Professional and Continuing Education, University Housing, and Parking operations.

**Revenue Management Program (RMP):** A strategic plan implemented by the Chancellor's Office to create operating efficiencies throughout the 23 campuses of the CSU System. Changes to financial policies and procedures first occurred in fiscal year 2006/07. The first and foremost change was to deposit student fees into a CSU trust account rather than into the State Treasury.

**Shortfall:** When a historic funding level is identified as insufficient to cover projected expenditures.

Spartan Foundation: Fundraising arm of the Division of Intercollegiate Athletics that is specifically responsible for student athlete scholarships. The Foundation consists of an Executive Board and Board of Directors that are responsible for recruiting volunteers and soliciting gifts during the annual fund drive.

State University Grant (SUG): A grant program that provides need-based awards to cover a portion of the Tuition Fee for eligible undergraduate and graduate California residents who have an expected family contribution of \$5,000 or less.

Student Success, Excellence & Technology Fee (SSETF): The SSETF is a mandatory student fee paid by all students. The fee expands support for comprehensive student success services and improved pathways to graduation.

Support Budget: Operating Fund base budget plus any one-time funding for a given fiscal year.

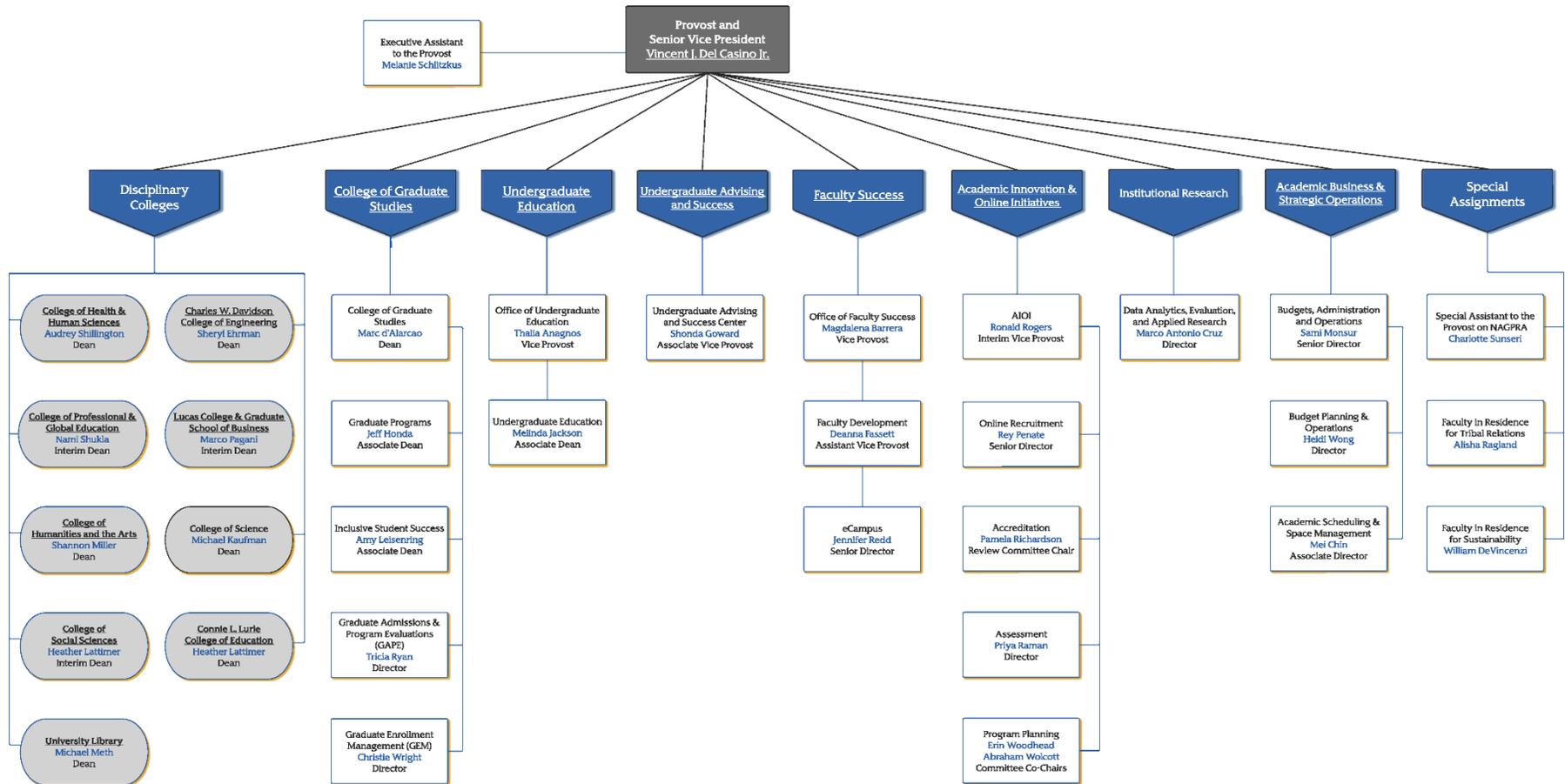
Teacher Education Assistance for College and Higher Education (TEACH) Grant: Provides grants to eligible students enrolled in teacher credential and graduate education programs who intend to teach in public or private elementary, or secondary schools that serve students from low-income families.

Tower Foundation: The Tower Foundation is SJSU's auxiliary organization dedicated solely to philanthropy. Its primary mission is to build bridges with alumni and friends by improving services, stewardship and donor support. The Foundation encourages private gifts, trusts, and bequests for the benefit of San José State University and manages the university's endowment to achieve maximum returns.

Tuition Fee: In November 2010, the Board of Trustees voted to rename the State University Fee (SUF) the Tuition Fee. All students, resident and non-resident, pay the Tuition Fee.

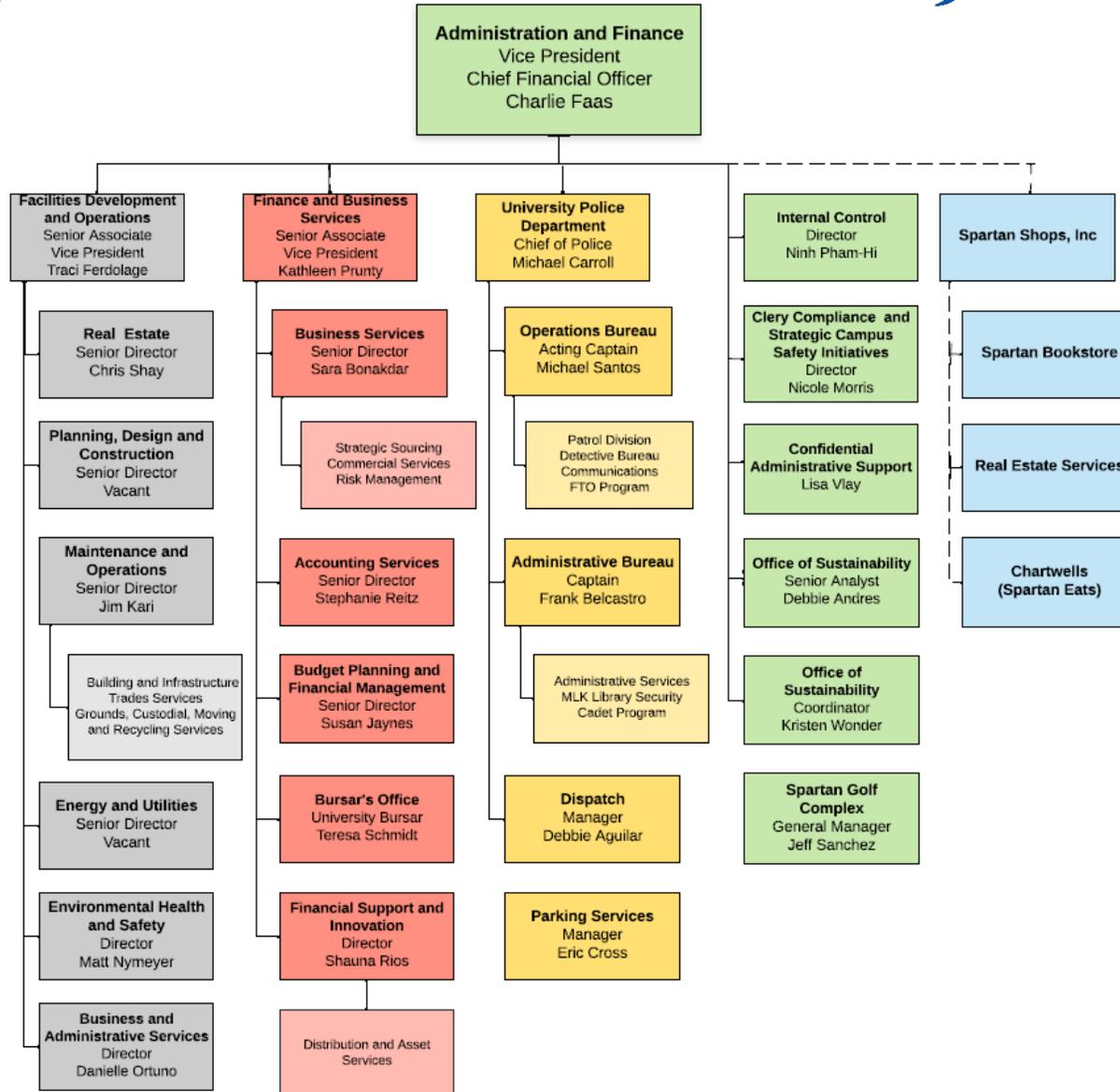
University Wide Resources: Resources essential to the operation of the campus and independent from any particular division's core activities. Examples include utilities, benefits and compensation pools, space rental and risk pool premiums.

# ORGANIZATIONAL CHARTS BY DIVISION

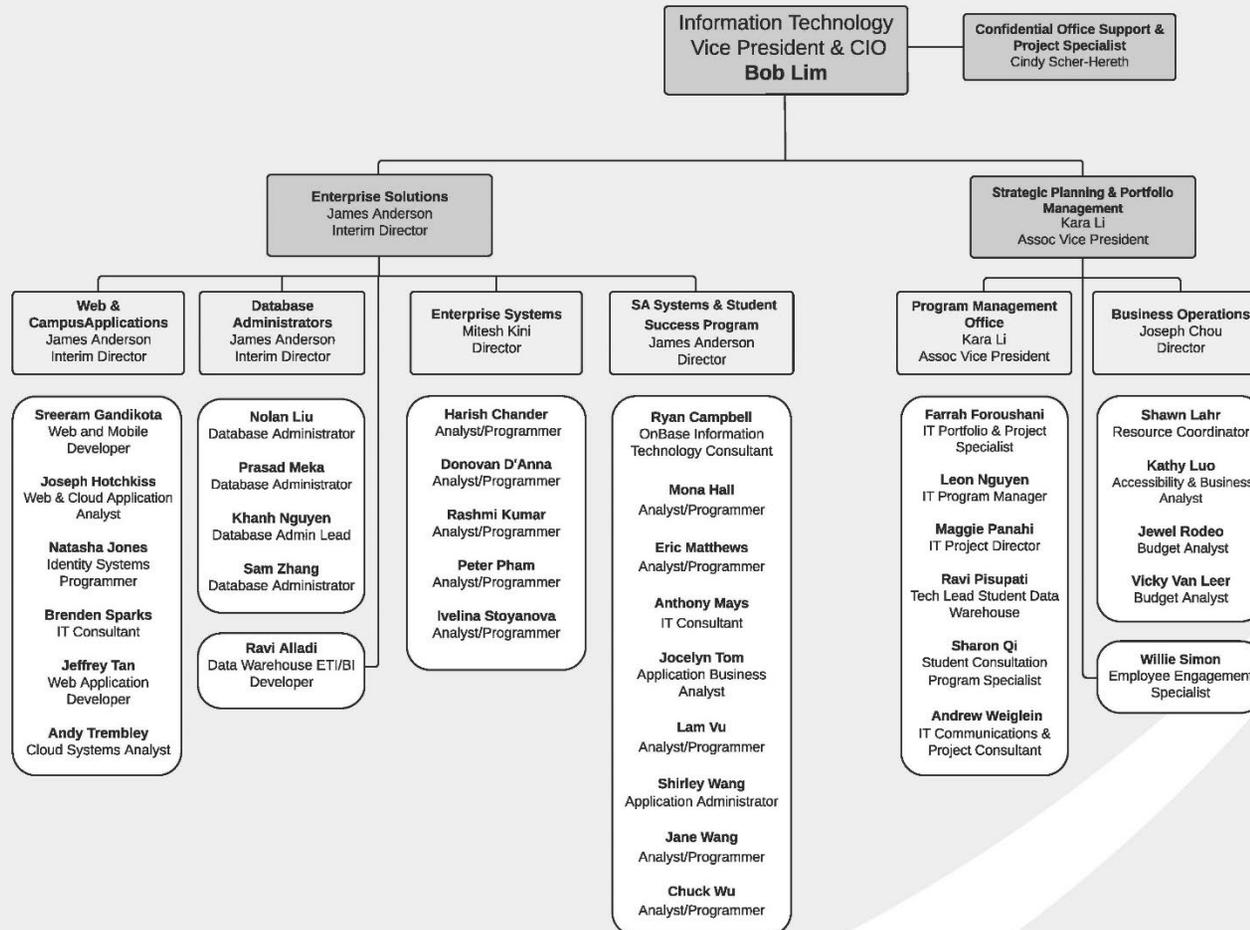


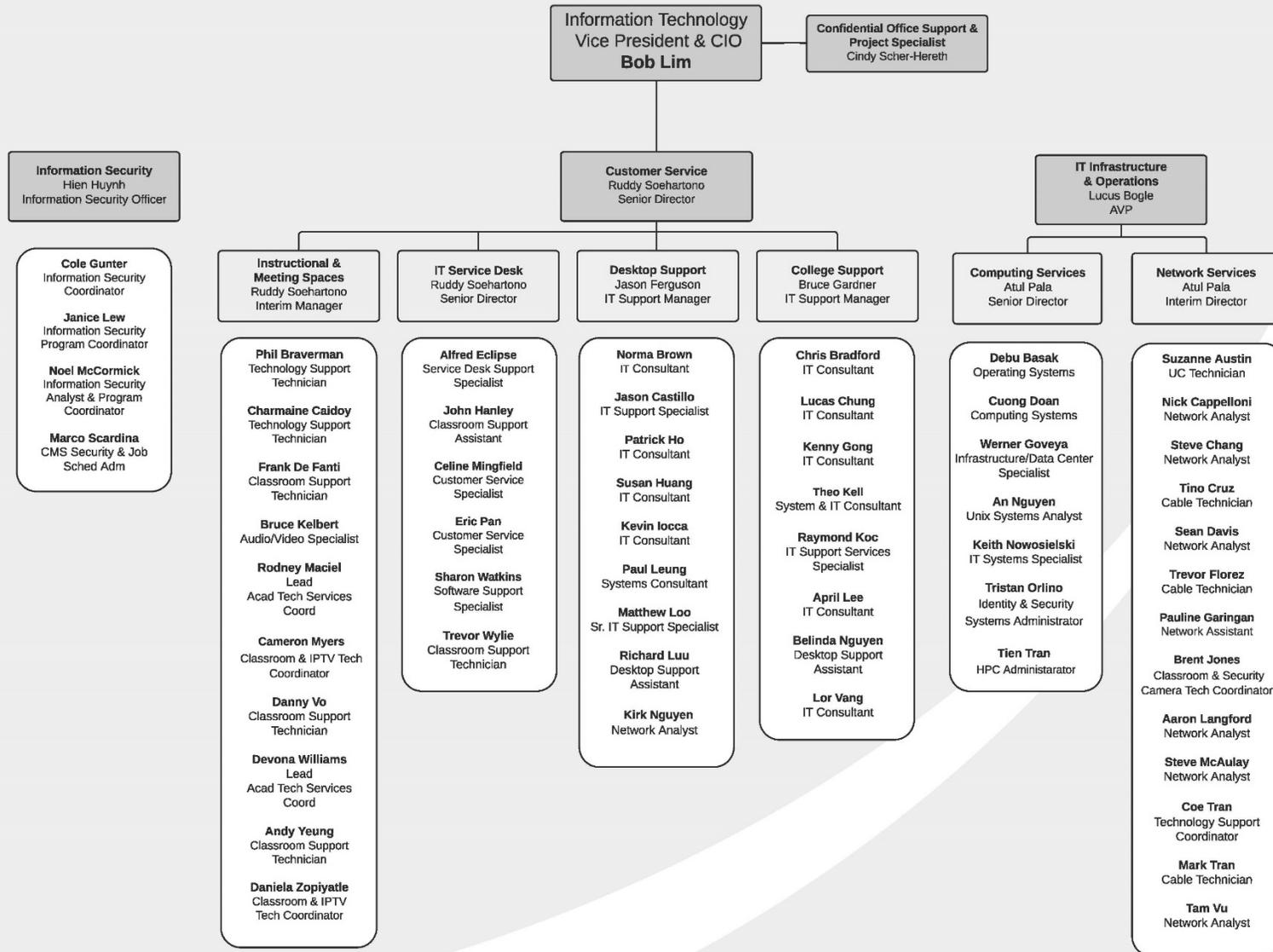
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**ADMINISTRATION AND  
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ORGANIZATIONAL CHART**

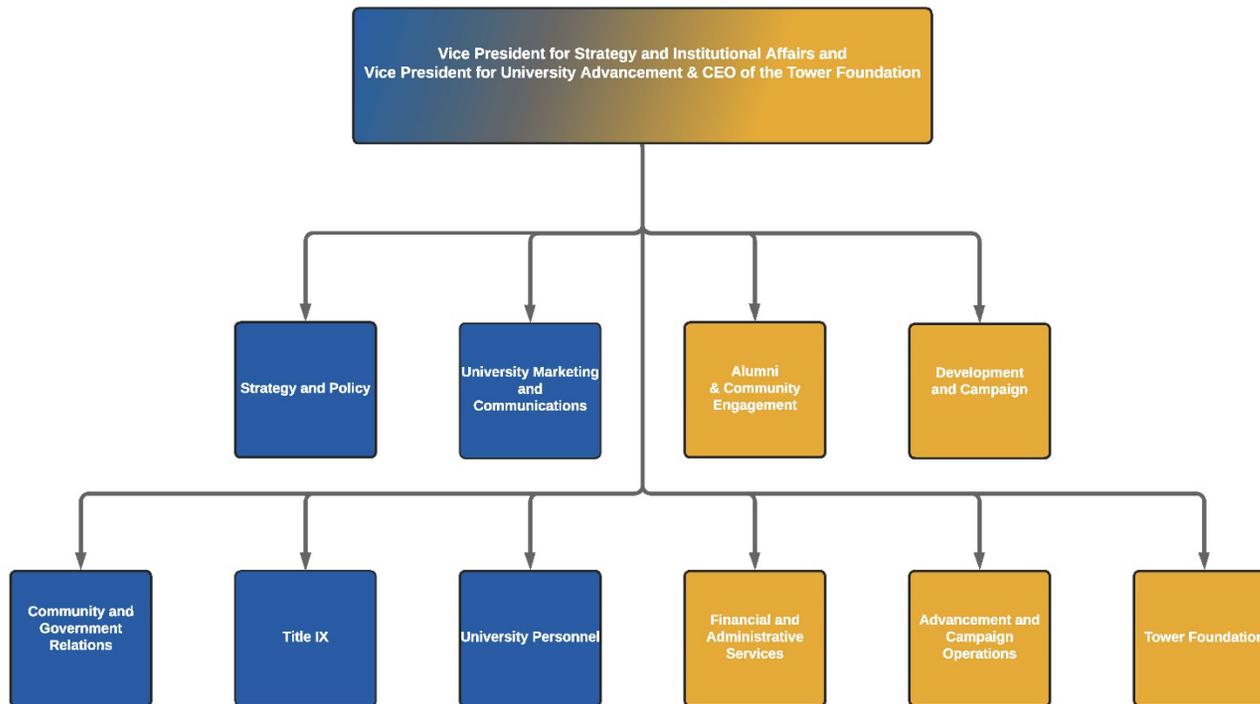


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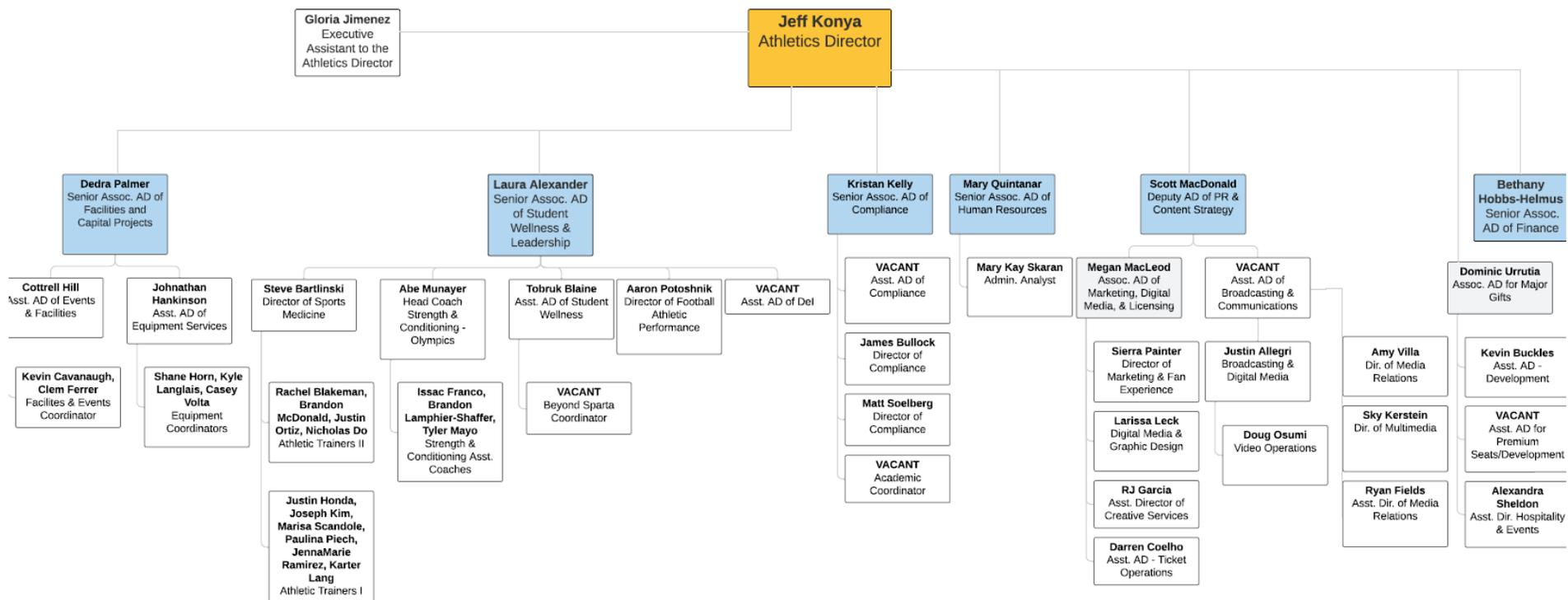
**Institutional Affairs and University Advancement**



	Institutional Affairs
	University Advancement



**Division of Intercollegiate Athletics**  
**San José State University**

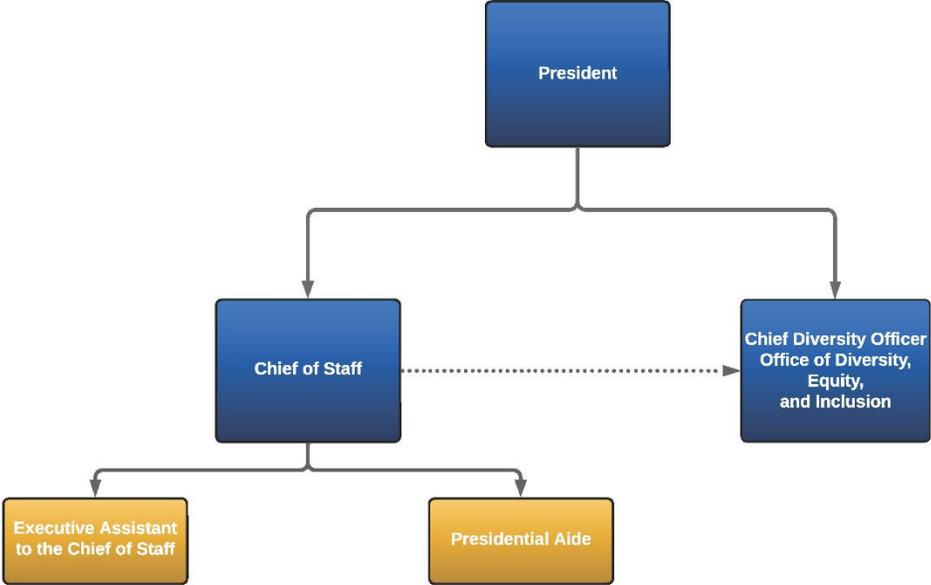


**The Charge of the Spartans**

San José State Athletics will provide a **cutting-edge experience** for student-athletes and promote an environment that **builds champions** in the classroom, in competition, and in the community.

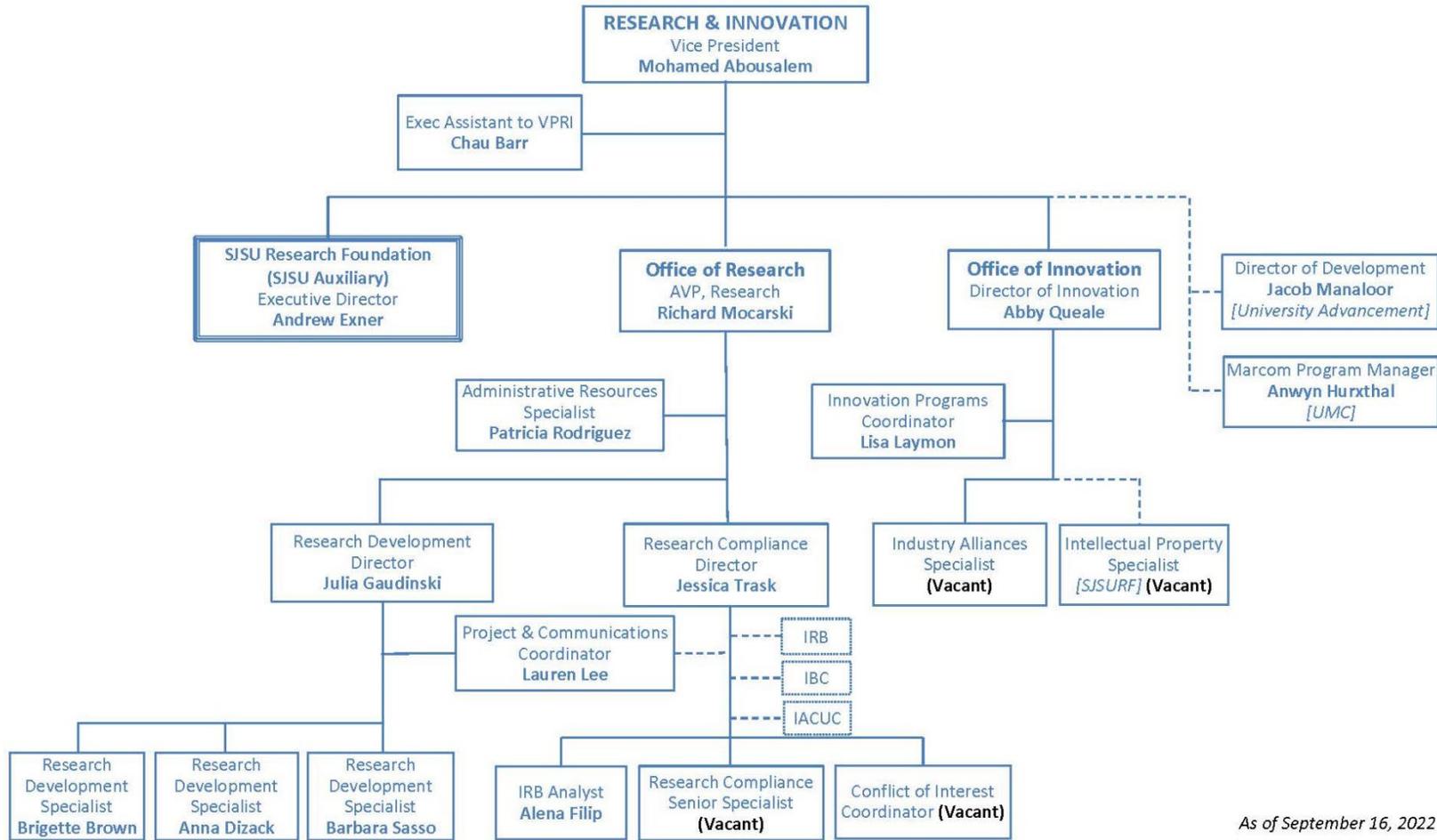
As of August 2022

**Office of the President**

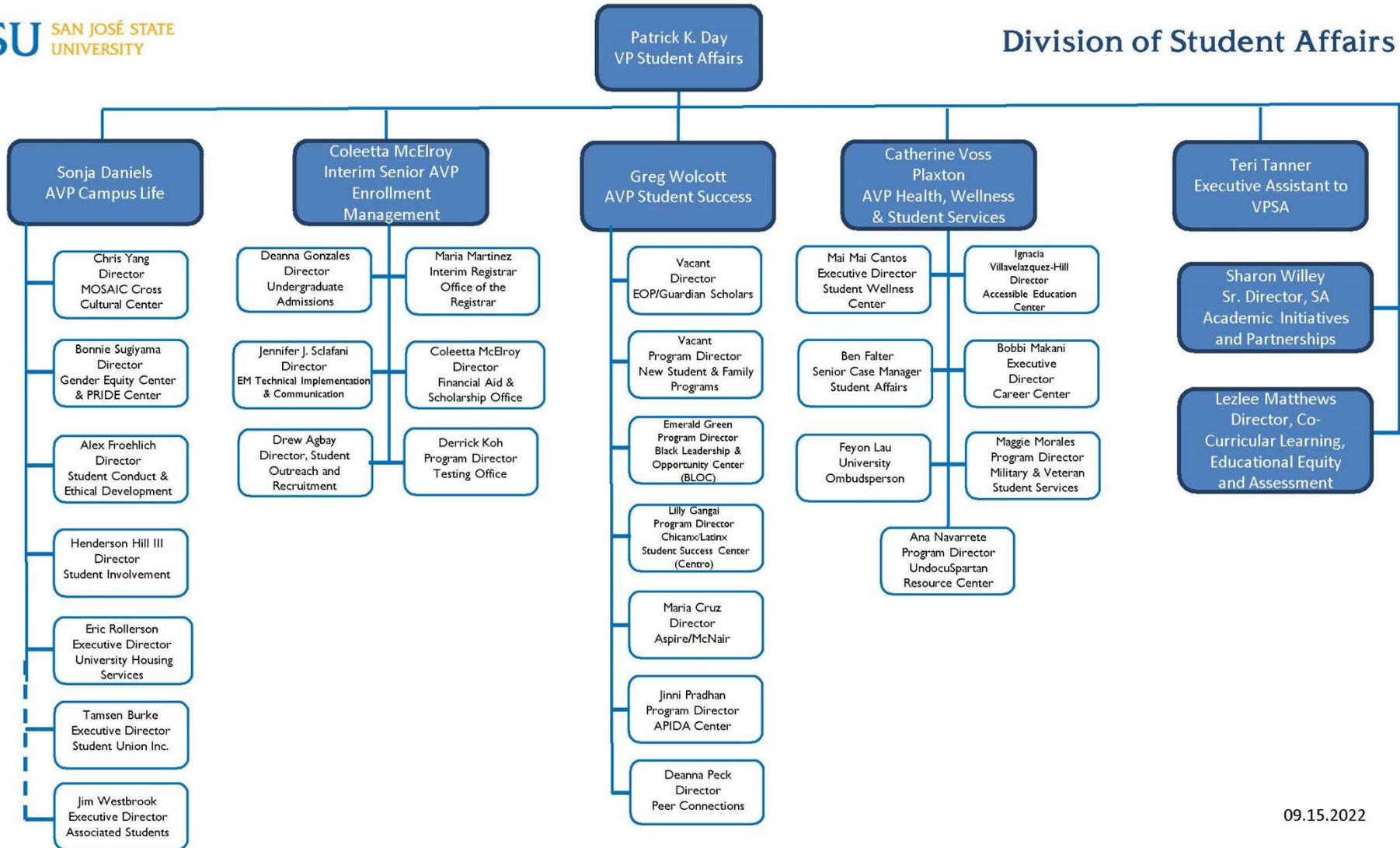


MPP
Confidential Administrative Assistant

# Division of Research & Innovation



As of September 16, 2022



09.15.2022