

SAN JOSE STATE UNIVERSITY ACADEMIC SENATE

2019/2020

Agenda

October 28, 2019, 2:00 pm – 4:00 pm

Engineering 285/287

- I. Call to Order and Roll Call:**
- II. Approval of Minutes:** N/A
- III. Communications and Questions:**
 - A. From the Chair of the Senate
 - B. From the President of the University
- IV. Executive Committee Report:**
 - A. Minutes of the Executive Committee – N/A
 - B. Consent Calendar –
 - C. Executive Committee Action Items –
- V. Unfinished Business:**
- VI. Policy Committee and University Library Board Action Items (In rotation)**
 - A. Professional Standards Committee (PS):
 - B. Organization and Government Committee (O&G):
 - C. University Library Board (ULB):
 - D. Curriculum and Research Committee (C&R):
 - E. Instruction and Student Affairs Committee (I&SA):
- VII. Special Committee Reports:**
- VIII. New Business:**

Time Certain: 2:10 p.m., Annual Budget Presentation by VP Faas

Time Certain: 3:05 p.m., Academic Affairs Budget Presentation by Senior Vice Provost Carl Kemnitz
- IX. State of the University Announcements:**
 - A. Chief Diversity Officer
 - B. CSU Faculty Trustee (by standing invitation)
 - C. Statewide Academic Senators
 - D. Provost
 - E. Associated Students President
 - F. Vice President for Administration and Finance
 - G. Vice President for Student Affairs
- X. Adjournment**

Consent Calendar
SJSU Academic Senate Meeting
October 28th 2019

Add to Committee	Last/First Name	Zip	Term	Phone	Seat/College
Academic Senate	Lombardi, Paul	0114	2020	45404	Senator - College of Social Science
Curriculum & Research	Lombardi, Paul	0114	2020	45404	Seat L - Social Science (2nd Senator in Rotation)
Instruction/Student Affairs	Muller, Gilles	0249	F2019	42632	Seat S - College of Science [Filling in for Sabbatical]
Alcohol/Drug Abuse Prevention	Kinney, Kevin	0133	EXO	55835	Seat E - Associate Director Residence Life
Alcohol/Drug Abuse Prevention	Gerentes, Vicki	0038	EXO	45958	Seat C - Stu Engagement Coordinator (Greek Life)
Institutional Review Board	Rivard, Jeanne		2020		Seat O - Community At Large
Accreditation Committee	Song, Ju Myung	0164	2022	45968	Seat O - Faculty At Large
University Library Board	Carrera, Daniella	0128	2020	46242	Seat 1 - Assoc Student President or *Designee
University Library Board	Potika, Katerina	0249	2022	45134	Seat L - College of Science

Remove from Committee	Last/First Name	Zip	Term	Phone	Seat/College
Organization & Government	Lemon, Kathy	0124	2020	45854	Seat D - Education (FAL)
Transit, Traffic, Parking	Yau, Danny	0166	EXO	42219	Seat D - Staff Member, UPD non-voting
Alcohol/Drug Abuse Prevention	Romero, Liz	6204	EXO	46122	Seat A - Assoc. Dir, Wellness/Health Promotion or designee
Alcohol/Drug Abuse Prevention	Amezcuca, Jason	0133	EXO	55635	Seat E - Associate Director Residence Life
Alcohol/Drug Abuse Prevention	Hill, Henderson	0038	EXO	45957	Seat C - Stu Engagement Coordinator (Greek Life)
University Library Board	Parent, Branden	0128	2020	46242	Seat 1 - Assoc Student President or designee



Photo by David Schmitz

Budget Report

Fiscal Year
2019/20

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October 18, 2019

**Office of the Vice President
Administration and
Finance**

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TO: Campus Community

FROM: Charlie Faas, Vice President for Administration & Finance/CFO

SUBJECT: 2019/20 BUDGET REPORT

The following document is a presentation of San José State University's (SJSU's) annual operating budget plan for 2019/20. SJSU budgets are addressed in varying detail, but the main focus of this document is SJSU's Operating Budget. The Operating Budget has two main components: funding appropriated from the State of California that is distributed by the California State University (CSU) Chancellor's Office to SJSU, and student fee revenues collected by the campus. Budget presentations in this document are primarily focused on the current fiscal year from an overall University perspective. Financial information relating to specific units may be obtained by contacting the appropriate Vice President's Office for assistance.

Fiscal year 2019/20 marks the seventh year of increased support for higher education from the State of California. The final State Budget increases CSU's annual Operating Budget by \$379 million – nearly double the increase received last year – supporting Graduation Initiative 2025, enrollment growth, employee compensation, and mandatory costs. The state budget includes another \$239 million for the CSU toward addressing deferred maintenance and infrastructure needs across the system. This sum far exceeds prior allocations, which ranged from \$25 million to \$35 million per year. We owe great thanks to our faculty trustee, Romey Sebalus, for his contributions to this favorable outcome.

While the State and CSU continue to operate on a year-to-year basis, SJSU has fully engaged in a three-year budget planning process to mitigate future fluctuations in the State's commitment to funding the CSU's Operating Budget request and enable SJSU to financially commit to its priorities. In an effort to maximize resource utilization, anticipated salary, benefits and other savings are taken into account in developing the budget plan. These new efforts allow the university to align resources with ongoing needs and support the promising initiatives arising from the strategic plan, *Transformation 2030*.

Guided by *Transformation 2030*, SJSU continues to evaluate and articulate the campus' goals and outcomes, and direct its resources accordingly. As exhibited across the campus through various conversations, student success and the pursuit of improved graduation rates and closing achievement gaps remains a clear priority for the years ahead. Other significant initiatives include the expansion of research and innovation activities, support for faculty recruitment, and continued investments in safety, security and facilities to enhance the SJSU experience and enable future growth.

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University Resource Summaries

- Budget Calendar
- Highlights and Facts
- Operating Budget Comparison: 2018/19 vs. 2019/20
- Operating Base Budget Resources
- Operating Budget Sources and Uses
- Expenditure Budget by University Division
- Comparison of CSU Campus Expenditures

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JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
State / Legislature											
						Gov's Proposed Budget		Legislative Budget Hearings			
										May Revision Budget	Final Enacted Budget
CSU Chancellor / Board of Trustees											
	Support Budget Planning, Enrollment Targets Finalized										
Final Allocation (B-Letter)				Support Budget Adopted			Preliminary Allocation Memo (B-Letter)				
San José State University											
	Fall Classes Begin		Fall Applications	Fall Students Accepted					Fall Enroll Intent		
Business Plans Approved								Cont. Students Register	New Students Register		
President's Cabinet Budget Planning		Annual Budget Report Prepared					Division New Funding Requests		Business Plans Due	Business Plans Reviewed	
			Enrollment Plan						Base Budget Roll		

HIGHLIGHTS AND FACTS: 2019/20 OPERATING BUDGET

In June 2019, Governor Newsom signed and enacted the 2019/20 California State Budget, appropriating General Funds of \$4.3 billion towards the California State University. This allocation extends the practice of providing annual budget increases for the CSU into a seventh year.

Base Funding

The Governor and state legislature approved a base (ongoing) increase of \$379 million to the CSU's annual Support Budget. The incremental base funding increase will continue to support Graduation Initiative 2025 (student success), employee compensation, benefit obligations, and other mandatory costs. While the approved budget is greater than the earlier proposals from the Governor and the Assembly, the budget is less than the CSU's Support Budget request of \$554 million for ongoing needs.

As a result of these allocations, SJSU's base budget increases by \$21.8 million in 2019/20, plus \$1.5 million for prior year adjustments relating to retirement. Below is a summary of the CSU's and SJSU's base budget allocations.

	CSU	SJSU
Graduation Initiative 2025	\$45,000,000	\$2,352,000
Employee Compensation	\$147,831,000	\$9,235,000
Mandatory Costs (Health, Retirement, Minimum Wage)	\$42,272,000	\$1,708,000
Enrollment Growth	\$131,158,000	\$8,454,000
Other Program Adjustments	\$12,804,000	--
5% State University Grant Redistribution Across CSU		36,800
2019/20 Base Allocations	\$379,065,000	\$21,785,800
Prior Year Retirement Adjustment	\$22,502,000	\$1,503,000
2019/20 Base Allocations & Prior Year Adjustments	\$401,567,000	\$23,288,800

The CSU's Support Budget request for Graduation Initiative 2025 totaled \$75 million in base funding. The final state budget included \$45 million in base funding and \$30 million in one-time of the one-time resources, based on resident FTES, is \$1.85 million.

The Budget Act of 2018 included \$120 million of one-time funding for the CSU to support enrollment over the next four years. This is the second year of the enrollment support initiative and \$35. distributed to campuses with an acknowledgment that the nature of one-time funding is challenging for this purpose, thus there were no changes to campus enrollment targets. In 2019-20, SJSU will receive \$2.2 million in one-time enrollment support. In addition, the state budget provided support Math & Science Teacher Initiative, of which, SJSU received \$95,000.

Other one-time funding for child care centers and deferred maintenance was provided in the and will be distributed from CSU General Funds; SJSU allocations are detailed in the following report under Capital Outlay and Deferred Maintenance.

Enrollment

Enrollment growth funds in the 2019-20 CSU budget total \$131 million for 10,000 resident full-time equivalent students (FTES) – a 2.7% increase. The CSU resident enrollment target now exceeds 374,000 students. SJSU's resident enrollment target increases by 569 FTE this year – a 2.5% increase. The university's enrollment plan also includes 1,154 "surplus" resident students in order to support access. Non-resident enrollment is expected to decrease this year and is conservatively planned at 2,707 FTES. SJSU's total enrollment is planned at 27,177 FTES, an overall increase of 1.7% compared to last year's enrollment plan. Additional details may be found under the Student Enrollment and Fees section of the report.

	2018/19 Budget			2019/20 Budget		
	Base	Surplus	Total	Base	Surplus	Total
Resident FTES	22,747	1,060	23,807	23,316	1,154	24,470
Non-Resident FTES	2,650	269	2,919	2,650	57	2,707
Total FTES	25,397	1,329	26,726	25,966	1,211	27,177
Total Headcount	30,340	1,589	31,929	31,000	1,450	32,450

Funding Allocations and Campus Priorities

The Operating Budget Sources and Uses table details the distribution of the funding across the campus in support of priorities and budgetary needs. Budget planning efforts are aligned with Strategic Planning, and broadly emphasize Graduation Initiative 2025 and student success, an investment in Research, Scholarly & Creative Activity, safety, and correcting for existing budget gaps. These efforts propel SJSU forward and enable future growth.

Operating Budget Comparison 2018/19 vs 2019/20

	2018/19 Budget	2019/20	Adjustment	Percent Change
Operating Budget				
General Fund Appropriation	\$171,724,882	\$192,262,682	\$20,537,800	12.0%
Revenues (a)	\$200,309,739	\$211,488,067	\$11,178,328	5.6%
	\$372,034,621	\$403,750,749	\$31,716,128	8.5%

Budgeted FTES				
CSU Resident FTES Allocation	22,747	23,316	569	2.5%
Non-Resident FTES (campus target)	2,650	2,650	-	0.0%
	25,397	25,966	569	2.2%

Detail of Budget Adjustments between 2017/18 and 2018/19:

CSU Budget Adjustments

2.5% Enrollment Growth (569 FTES)	\$6,442,000	
Average Unit Load Increase	\$2,012,000	
Graduation Initiative 2025	\$2,352,000	
Compensation Adjustments	\$9,235,000	
Mandatory Costs (b)	\$1,708,000	
Student Aid	\$36,800	
Prior Year Retirement Adjustment	\$1,503,000	
		\$23,288,800

Campus Budget Adjustments

Tuition Fee Adjustment (c)	\$1,010,090	
Reclassification of Cost Recovery Funds by CSU (d)	\$7,392,532	
Work Study Increase	\$24,706	
		\$8,427,328
		\$31,716,128

Footnotes:

(a) See next page for a breakdown of Revenues. Prior year report excluded budget of \$418,000 related to existing fees.

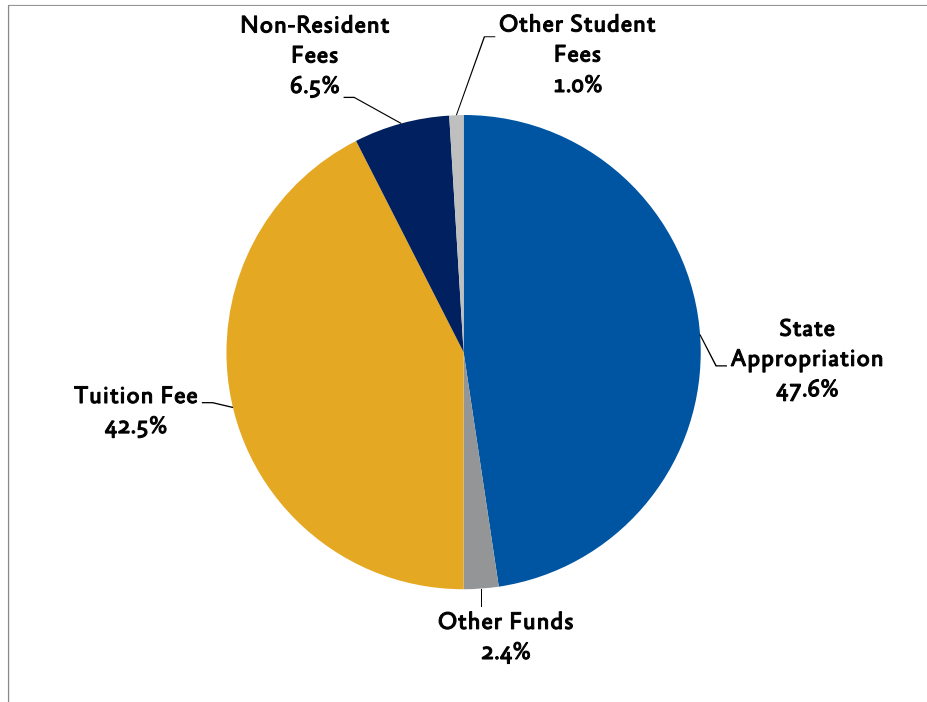
(b) Mandatory Costs include health benefit premiums, retirement contributions beyond those funded by the state, and minimum wage increases.

(c) Tuition Fee Adjustment represents the difference between campus-calculated fee revenues versus fee revenues calculated by the Chancellor's Office. Differences are primarily due to variations in student mix (e.g., full/part-time, undergraduate/graduate, etc.)

(d) Effective July 1, 2019, cost recovery funds were included in the Operating Fund.

2019/20 Operating Base Budget Resources

State Appropriation	\$192,262,682	47.6%
Tuition Fee		
Tuition Fee	\$170,625,000	
Campus Adjustment to Tuition Fee	\$1,010,260	
	\$171,635,260	42.5%
Non-Resident Fees		
Non-Resident Fees	\$26,367,500	
Campus Adjustment to Non-Res. Fee	\$0	
	\$26,367,500	6.5%
Other Student Fees		
Application Fee	\$2,250,000	
Diploma/Commencement Fee	\$336,000	
Transcript Fee	\$515,000	
Other Student Fees	\$812,000	
	\$3,913,000	1.0%
Other Funds		
Campus Work Study Program	\$890,000	
Cost Recovery from Other Funds	\$8,682,307	
	\$9,572,307	2.4%
Total Operating Fund Resources	\$403,750,749	100.0%



2019/20 Operating Budget Sources and Uses

	Ongoing	One-Time	Total
Sources of Funds			
General Fund Appropriation (1)	\$20,537,800	\$1,946,000	\$22,483,800
Campus Adjustments: Surplus Enrollment, Salary Savings	\$6,867,925	\$115,920	\$6,983,845
Reclassification of Cost Recovery Funds by Chancellor's Office (2)	\$7,392,532		\$7,392,532
Work Study Increase	\$24,706		\$24,706
University Funds Carried Forward		\$31,344,785	\$31,344,785
Division Contributions from Reserves		\$2,358,784	\$2,358,784
Total Sources	\$34,822,963	\$35,765,489	\$70,588,452
Planned Uses of Funds			
Mandatory Costs/Existing Commitments			
Employee Compensation	\$9,235,000		\$9,235,000
Health & Dental Premiums Adjustment	\$427,000		\$427,000
Retirement Adjustments	\$2,593,000		\$2,593,000
Minimum Wage Increase	\$191,000		\$191,000
Work Study Increase	\$24,706		\$24,706
State University Grants Adjustment	\$36,800		\$36,800
	\$12,507,506	\$0	\$12,507,506
Balance Remaining for Division Requests and Priorities	\$22,315,457	\$35,765,489	\$58,080,946
Approved Division Requests and Priorities			
<u>Academic Affairs</u>			
Audiology Facilities Work		\$500,000	\$500,000
Division Base True-Up	\$3,200,000		\$3,200,000
Dean-Graduate Studies Reorg	\$351,470		\$351,470
Doctorate of Nursing Practice (DNP)	\$552,098		\$552,098
Enrollment Support	\$2,901,900	\$3,390,800	\$6,292,700
Faculty Recruitment & Startup Costs		\$1,600,000	\$1,600,000
Institutional Effec. & Strategic Analytics	\$50,000		\$50,000
Institute-Sports, Society, Social Change	\$230,832		\$230,832
RSCA Assigned Time Investment	\$2,000,000		\$2,000,000
MSTI Program Support		\$95,000	\$95,000
	\$9,286,300	\$5,585,800	\$14,872,100
<u>Administration & Finance</u>			
Inflationary and Contractual Adjustments	\$91,386		\$91,386
Insourc Custodial	\$185,000		\$185,000
UPD Security Requirements	\$62,500	\$106,000	\$168,500
Financial Forecasting & Position Control System		\$235,000	\$235,000
Reclassification of Cost Recovery by Chancellor's Office (2)	\$7,392,532		\$7,392,532
	\$7,731,418	\$341,000	\$8,072,418

2019/20 Operating Budget Sources and Uses

	Ongoing	One-Time	Total
<u>Information Technology</u>			
Data Center UPS Upgrade		\$650,000	\$650,000
CNI Equipment Refresh		\$1,000,000	\$1,000,000
Student Data Warehouse		\$339,000	\$339,000
IT Base True Up	\$260,000		\$260,000
LinkedIn Strategic Partnership	\$150,000		\$150,000
Two Factor Authentication	\$35,000		\$35,000
IT Security Staff	\$45,000		\$45,000
Test Environment for Security Patching	\$100,000		\$100,000
Software Licenses	\$63,630		\$63,630
EAB License	\$100,000		\$100,000
Acessibility Technology Initiative	\$101,274	\$135,000	\$236,274
Data Informed Campus		\$270,000	\$270,000
Safety Cameras		\$500,000	\$500,000
IBM Innovation Center		\$75,000	\$75,000
Security Risk Assessment Consulting		\$100,000	\$100,000
Network Core Refresh		\$150,000	\$150,000
	\$854,904	\$3,219,000	\$4,073,904
<u>Intercollegiate Athletics</u>			
Video Streaming Equipment		\$500,000	\$500,000
Scoreboard/Sound Systems		\$125,000	\$125,000
	\$0	\$625,000	\$625,000
<u>Office of the President</u>			
Inflationary & Contractual Adjustments			\$0
Title IX Position (ODEI)	\$31,500		\$31,500
Strategic Communications	\$63,000	\$510,000	\$573,000
	\$94,500	\$510,000	\$604,500
<u>Organizational Development</u>			
University Personnel Software	\$90,000		\$90,000
University Personnel HC	\$56,000		\$56,000
	\$146,000	\$0	\$146,000
<u>Research & Innovation</u>			
Research Foundation Pre-Award	\$500,000		\$500,000
Division Setup	\$760,150		\$760,150
RSCA Marketing Campaign		\$25,000	\$25,000
	\$1,260,150	\$25,000	\$1,285,150

2019/20 Operating Budget Sources and Uses

	Ongoing	One-Time	Total
<u>University Advancement</u>			
Inflationary & Contractual Adjustments	\$44,318		\$44,318
Campaign Resources	\$126,000	\$250,000	\$376,000
	\$170,318	\$250,000	\$420,318
<u>University-Wide & Cross-Division Commitments</u>			
Campus Branding		\$34,000	\$34,000
Clark Hall/Administration Building		\$2,500,000	\$2,500,000
Facilities Space Rentals (ISSS/DSA)		\$429,226	\$429,226
Library and Dorm Security	\$400,000		\$400,000
60 SOMA Rent	\$260,000		\$260,000
Tower Foundation Projects		\$1,567,000	\$1,567,000
Academic Space/Furniture Refresh		\$400,000	\$400,000
Economic Impact Report		\$100,000	\$100,000
Deferred Maintenance Match Allocation		\$1,087,000	\$1,087,000
Clark Sidewalk Improvement		\$225,000	\$225,000
CalPERS Loan Repayment (SB 84)		\$1,750,000	\$1,750,000
Reserves for Contingency	\$2,111,867	\$17,117,463	\$19,229,330
	\$2,771,867	\$25,209,689	\$27,981,556
Total Approved Division Requests and Priorities	\$22,315,457	\$35,765,489	\$58,080,946
Net Sources (Uses)	\$0	\$0	\$0

Footnotes:

- (1) General Fund Appropriations includes one-time funding for Graduation Initiative 2025, Year 2 of Enrollment Growth, and Math Science Teaching Initiative
- (2) Full implementation of Chancellor's Office conversion of Cost Recovery Funds to CSU Operating Funds. These are not new resources, just a reclassification of existing resources and associated expenditure budgets.

2019/20 Expenditure Budget by University Division

	Office of the President	Academic Affairs	Admin & Finance	Student Affairs	Intercollegiate Athletics	University Advancement	Information Technology	Organizational Development	Research and Innovation	University-Wide (f)	Total University	% of Total
Operating Fund (a)												
Salaries	\$1,641,101	\$143,890,919	\$20,305,579	\$13,241,196	\$6,614,709	\$5,982,358	\$10,739,071	\$4,497,232	\$837,996	\$8,435,182	\$216,185,343	32.1%
Projected Benefits (b)	\$787,728	\$69,067,641	\$9,746,678	\$6,355,774	\$3,175,060	\$2,871,532	\$5,154,754	\$2,158,671	\$402,238	\$3,904,235	\$103,624,312	15.4%
OE&E	\$819,138	\$10,531,968	\$7,977,912	\$4,110,258	\$124,495	\$3,155,574	\$6,377,056	\$976,357	\$513,979	\$7,207,502	\$41,794,239	6.2%
Net Budget	\$3,247,967	\$223,490,528	\$38,030,169	\$23,707,228	\$9,914,264	\$12,009,464	\$22,270,881	\$7,632,260	\$1,754,213	\$19,546,920	\$361,603,895	53.8%
Restricted Student Aid (c)	\$13,371	\$464,899	\$178,529	\$288,427	\$42,680	\$71,429	\$12,388	\$58,229		\$41,016,903	\$42,146,855	6.3%
Total Operating Fund	\$3,261,338	\$223,955,427	\$38,208,698	\$23,995,655	\$9,956,944	\$12,080,893	\$22,283,269	\$7,690,489	\$1,754,213	\$60,563,823	\$403,750,749	60.0%
Graduate Business Professional Fee		\$497,250								\$165,750	\$663,000	0.1%
Student Orientation Programs		\$56,000		\$1,419,340							\$1,475,340	0.2%
SSETF-Instructionally Related Activities (d)		\$1,458,245		\$250,000	\$9,272,641					\$163,245	\$11,144,131	1.7%
SSETF-Course Support (d)		\$1,849,617								\$139,505	\$1,989,122	0.3%
SSETF-Student Success (d)		\$2,595,651		\$3,578,338						\$1,676,615	\$7,850,604	1.2%
Campus Revenue Funds												
Prof. & Continuing Educ (formerly CERF)		\$27,309,211	\$3,946,537	\$1,255,716						\$1,347,785	\$33,859,249	5.0%
Housing Funds				\$53,580,929							\$53,580,929	8.0%
Lottery Funds		\$2,311,333								\$170,679	\$2,482,012	0.4%
Other Revenue Sources (e)		\$671,500		\$494,000	\$8,086,007						\$9,251,507	1.4%
Parking Funds			\$12,059,788								\$12,059,788	1.8%
Student Health Funds				\$15,620,957							\$15,620,957	2.3%
Campus Auxiliaries												
Associated Students				\$8,934,147							\$8,934,147	1.3%
Research Foundation		\$55,230,000									\$55,230,000	8.2%
Spartan Shops			\$5,972,696								\$5,972,696	0.9%
Student Union				\$16,296,255							\$16,296,255	2.4%
Tower Foundation						\$32,300,000					\$32,300,000	4.8%
Total All Funds	\$3,261,338	\$315,934,234	\$60,187,719	\$125,425,337	\$27,315,592	\$44,380,893	\$22,283,269	\$7,690,489	\$1,754,213	\$64,227,402	\$672,460,486	100.0%

Footnotes:

(a) Operating Fund expenditure budget includes base funding as of September 2019 accounting period. This is only a representation of partial allocation to divisions. Other pending allocations (including compensation salary budgets) will be posted in the Fall (funds are held in University-Wide until actual distribution takes place).

(b) Benefit budgets for the Operating Fund are projected across divisions at 48% of total 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 2019/20 Student Success, Excellence Technology Fee financial display for greater detail. Amounts listed here do not include prior year encumbrances, carryover, or complete benefits by division due to pool allocations throughout the year.

(e) Other Revenue Sources include miscellaneous revenues from ticket sales, Spartan Foundation (Athletics), rental of University space, and other miscellaneous revenue-generating activities.

(f) U-Wide includes contingencies and reserves, funding towards commitments (before allocated to divisions), utilities, MLK Facility, risk management, hazardous waste, space rental, and university memberships fees.

2019/20 Operating Fund Expenditure Budget by University Division

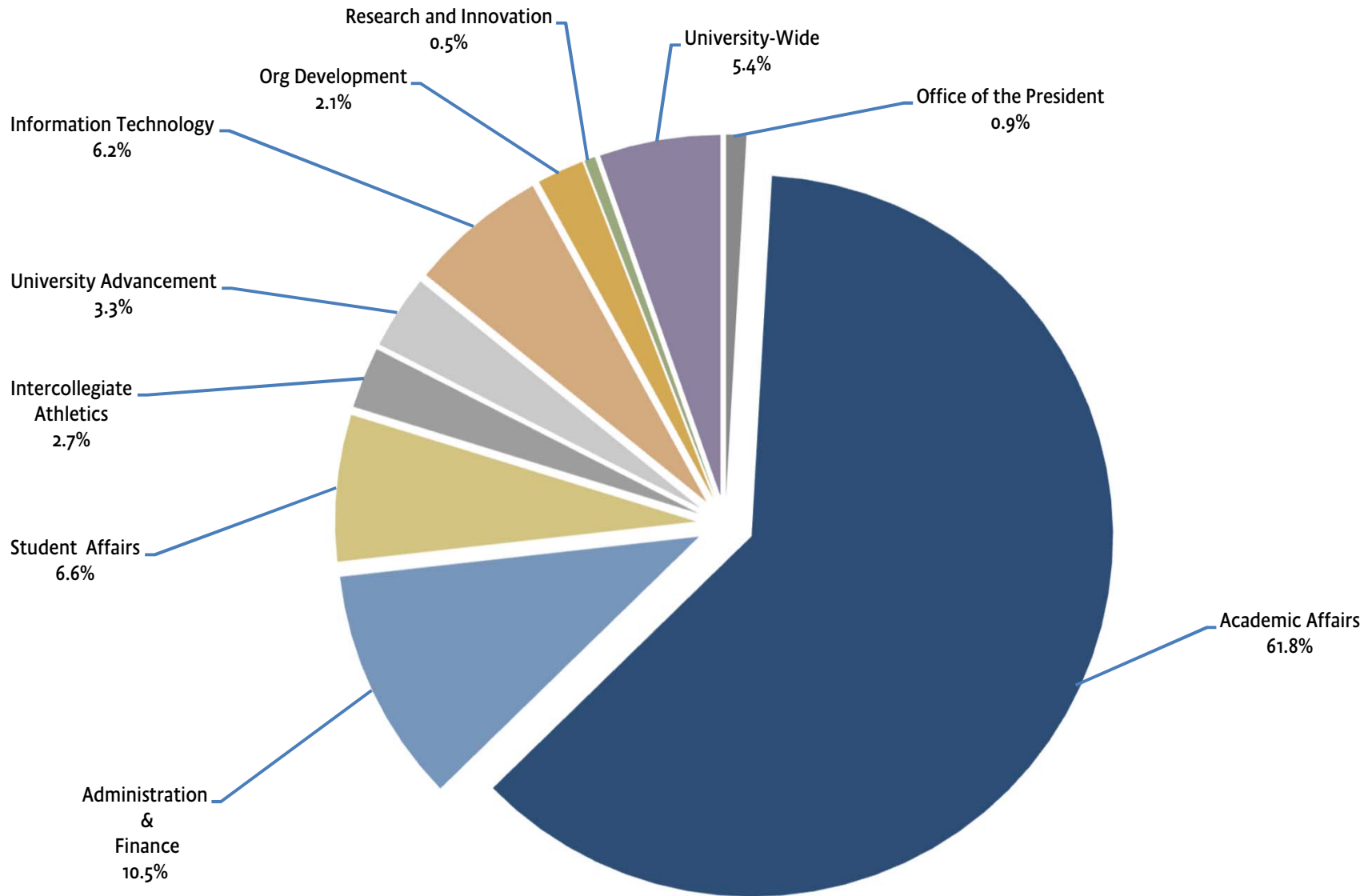


Chart displays Division's share of base expenditures budget for the Operating Fund. Excludes restricted student aid.

COMPARISON OF CSU CAMPUS EXPENDITURES 2017/18

2017/18 Comparison of San Jose and "Big 5" CSU Institutions

Expense Categories (c)	San Jose		Northridge		San Diego		San Francisco		Long Beach		Fullerton	
	Actuals	%	Actuals	%	Actuals	%	Actuals	%	Actuals	%	Actuals	%
Instruction	\$187,575,553	45%	\$198,575,240	43%	\$193,011,342	45%	\$176,215,063	45%	\$210,735,521	45%	\$205,290,751	45%
Research	\$207,335	0%	\$3,411,278	1%	\$2,268,910	1%	\$644,389	0%	\$519,994	0%	\$191,166	0%
Public Service	\$1,830,683	0%	\$1,277,715	0%	\$1,423,141	0%	\$1,147,409	0%	\$940,480	0%	\$591,250	0%
Academic Support	\$36,970,652	9%	\$43,427,531	9%	\$50,942,225	11%	\$41,111,917	11%	\$46,855,509	10%	\$34,608,053	7%
Student Services	\$58,171,030	14%	\$60,958,011	13%	\$64,338,834	14%	\$32,064,469	8%	\$52,148,450	11%	\$43,508,501	9%
Institutional Support	\$34,270,277	8%	\$45,254,075	10%	\$42,257,797	9%	\$45,601,138	12%	\$46,010,387	10%	\$68,515,993	15%
Operation & Maintenance	\$50,745,194	12%	\$46,577,346	10%	\$55,557,881	12%	\$40,979,252	11%	\$57,864,739	12%	\$53,565,597	12%
Student Financial Aid	\$49,822,151	12%	\$64,069,979	14%	\$36,681,667	8%	\$49,467,988	13%	\$58,710,356	12%	\$56,295,488	12%
Total Operating Expenses	\$419,592,875	100%	\$463,551,175	100%	\$446,481,797	100%	\$387,231,625	100%	\$473,785,436	100%	\$462,566,799	100%
2017/18 College Year FTES (d)	27,077		31,358		31,894		25,543		30,485		32,747	
\$ Expended per FTES	\$15,496		\$14,783		\$13,999		\$15,160		\$15,542		\$14,125	

Footnotes:

(a) The data source for this report is the "Actuals Summaries" for the CSU Operating Fund available on the CSU Budget Office website: <https://csyou.calstate.edu/Divisions-Orgs/bus-fin/budget/Pages/final-budget-and-actual-summaries/>.

(b) Auxiliaries, Housing, Parking and Federal funds for student aid are not included in this display.

(c) Standard reporting categories used by all universities to report financial data.

Source: www.calstate.edu/as/cyr/cyr17-18/excel/Cy17_03.xlsx; Table 3.

(d) Rounded to nearest FTES.

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Selected Funds and Self- Support Operations

Selected Funds

- Capital Outlay and Deferred Maintenance
- Student Success, Excellence and Technology Fee
- Intercollegiate Athletics
- Lottery

Self- Support Operations

- Continuing Education Reserve Fund & College of International and Extended Studies
- Student Health
- University Housing Services
- University Parking Services

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CAPITAL OUTLAY AND DEFERRED MAINTENANCE

Each year, CSU campuses submit a plan to the Office of the Chancellor to request the inclusion of projects in the CSU's Five-Year Plan for facilities renewal and capital improvement. The comprehensive CSU Five-Year Plan includes both State-funded and Self-Support capital improvement and deferred maintenance projects, and is presented to the CSU Board of Trustees and later submitted to the State Legislature and Department of Finance. Historical plans may be viewed online from the calstate.edu/cpdc website.

Major Capital Improvements

Over recent years, San José State University (SJSU) has embarked on a number of major capital improvement projects to better meet the current needs of the campus community, update and improve upon existing facilities. Major completed projects include the Student Union Expansion and Renovation, Spartan Complex Seismic Renovation, Campus Village Phase II (CVII), and most recently the Spartan Recreation and Aquatic Center (SRAC).

Funded from Student Union fee reserves and a Systemwide Revenue Bond (SRB) to be repaid with Student Union fees, SRAC opened in April 2019, featuring five workout areas including 20,000 square feet of cardio and strength equipment, three full-court gymnasiums, four exercise studios, an indoor track, two swimming pools, and common space lounge areas.

In late April 2019 campus celebrated the groundbreaking for the Interdisciplinary Science Building (ISB) which will offer academic space for teaching, research labs, faculty offices, and collaborative space. The ISB will be the first new academic building on campus in more than 30 years, the first new science facility in almost 50 years, and serves as the first phase of an envisioned Science Park. The eight-story building is designed LEED Silver (target LEED Gold) and is expected to be complete for occupancy by 2022. The budgeted construction cost of the project is \$181 million, largely funded by the SRB program, with contributions from campus reserves, Professional and Continuing Education funds, and support from the Research Foundation.

Other Future Major Capital Projects in Plan 2019/20 – 2023/24

- State-Funded Academic Projects, with campus contribution
 - Duncan Hall Renovation Phases I+II: \$72 million SRB + \$7 million campus
 - *Listed as* Dudley Moorhead Hall Renovation/Addition: \$41 million SRB
- Self-Support Projects
 - Dining Commons Addition: \$47 million (most recent estimate)
 - Campus Village Phases III + IV: \$316 million (most recent estimate)

In addition to the projects identified in the Five-Year Plan, SJSU is also reviewing the potential of the Alfred E. Alquist Building in downtown San José for a mixed-use housing project. To support the initiative, the Budget Act of 2019 included an appropriation of \$250,000 for evaluation of the project.

Deferred Maintenance & Infrastructure Improvements

Over recent years, the State has provided limited one-time funding to the CSU for deferred maintenance projects, with appropriations ranging from \$25 million to \$35 million per year for 2015/16 through 2018/19. For 2019/20, the State committed \$239 million of funding for deferred maintenance and infrastructure needs to help reduce the \$11 billion+ backlog of need across the system.

The final list of deferred maintenance projects and funding amounts are currently pending review by the State. Barring any changes from that review, SJSU expects to receive approximately \$17.7 million in deferred maintenance funding for infrastructure and steam line projects.

After the completion of a financing round at the systemwide level, SJSU also anticipates \$10.7 million in infrastructure improvement funding for ADA restroom upgrades, lighting replacements, HVAC control upgrades, and electrical infrastructure renewal projects, among others.

In addition, campus will directly fund a number of continuing and new deferred maintenance projects in 2019/20 to support the repair, replacement, and upgrading of various facilities, grounds, and mechanicals.

STUDENT SUCCESS, EXCELLENCE, AND TECHNOLOGY FEE (SSETF)

The display on the following page identifies allocations made from the Student Success, Excellence and Technology Fee (SSETF). The SSETF is a mandatory student fee paid by all students. The per-term fee rate for 2019/20 is as follows: Instructionally Related Activities Fee (\$167), Course Support Fee (\$34.00), and Student Success Fee (\$133.50). The six priorities supported by the SSETF are detailed below.

1. Student Success Services & Graduation Pathways

Expand support for comprehensive student success services and improved pathways to graduation.

2. 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.

3. 21st Century Teaching Spaces

Create 21st century classrooms, labs and learning spaces, including virtual spaces (e.g., lecture capture, e-portfolios, social media, etc.)

4. Retention & Graduation

Expand support for all students and work to close the retention and graduation gap for Under-represented Minority students (URM)

5. Course Support

Enhance support for instructional materials and methods used in the delivery of instruction.

6. 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

Campus Fee Advisory Committee (CFAC)

SSETF proposals are submitted by division leadership and reviewed by the Campus Fee Advisory Committee (CFAC). The last call for SSETF proposals for Instructionally Related Activities (IRA) Fee funding and Student Success Fee funding was for two years, 2017/18 and 2018/19. Commitments were reviewed by CFAC in April 2017 and approved by the president in June 2017. The displays on the following page reflect both base and one-time allocations based on the University Enrollment Plan. For updates to the SSETF commitments, please visit http://www.sjsu.edu/finance/policies_guidelines/ssetf/.

Student Success, Excellence & Technology Fee 2019/20 Budget

	IRA	Course Support	Student Success	Total SSETF Budget	
Revenues					
Fees	\$10,865,989	\$2,213,318	\$8,687,002	\$21,766,309	(a)
Total Operating Revenues	\$10,865,989	\$2,213,318	\$8,687,002	\$21,766,309	
Division Expenses					
Academic Affairs	\$1,458,245	\$1,849,617	\$3,448,891	\$6,756,753	
Student Affairs			\$3,578,338	\$3,578,338	
Student Union (Club Sports)	\$250,000			\$250,000	
Intercollegiate Athletics	\$9,272,641			\$9,272,641	
University-Wide	\$163,245	\$139,505	\$2,126,375	\$2,429,125	(b)
Total Division Expenses	\$11,144,131	\$1,989,122	\$9,153,604	\$22,286,857	
Net Revenue (Expense)	(\$278,142)	\$224,196	(\$466,602)	(\$520,548)	
Prior Year Balance Net of Encumbrances	(\$150,379)	(\$19,505)	\$4,689,691	\$4,519,807	
Budget Balance (Base and One-Time)	(\$428,521)	\$204,691	\$4,223,089	\$3,999,260	(c)

Footnotes:

- (a) Fees includes both base and one-time projected revenues.
- (b) Includes employee benefits pool. Budget is allocated over the course of the fiscal year to Academic Affairs and Student Affairs to cover actual benefit expenses incurred.
- (c) Reserves have supported compensation increases as established by applicable collective bargaining agreements & future programmatic allocations under the direction of CFAC and the campus president.

INTERCOLLEGIATE ATHLETICS

San José State University's Division of Intercollegiate Athletics is an integral part of the institution's overall educational mission. The goal is to establish a "Culture of Champions", as San José State Athletics continues to build on the university's tradition of academic and athletic excellence. Athletics prides itself on upholding its four core values – Student-Athlete Welfare, Academics, Compliance, and Spartan Pride.

For more than a century, Athletics has been fostering athletic excellence and takes pride in the successes of SJSU graduates, both on and off the field. The success is measured not only by the athletic performance of its students, but also by their contribution to society as students and as alumni.

To achieve the best for student-athletes and become more competitive nationally, the division aims to:

- Recruit and retain top athletes by providing financial incentives through scholarships.
- Create a supportive environment to ensure academic success of student-athletes and provide opportunities to advance the physical, mental, social, and emotional rewards that result from a comprehensive educational experience.
- Empower coaches with resources.
- Strengthen athletic programs and enhance the facilities for competition, practice and training for all athletic programs.

San José State University is a member of the Mountain West Conference (MWC) which provides tremendous opportunities. San José State also competes in the Western Athletic Conference (Men's Soccer), the Mountain Pacific Sports Federation (Women's Gymnastics and Women's Water Polo), and the Golden Coast Conference (Men's Water Polo).

Intercollegiate Athletics 2019/20 Budget

	CSU Operating Fund (a)	Student Success, Excellence & Technology Fee (IRA)	Generated Revenues	All Funds Total
Revenues/Allocations				
Allocated Funds	\$10,247,855	\$9,906,033		\$20,153,888
Work-Study Funds	\$42,857			\$42,857
Student Assistants	\$62,100			\$62,100
Development			\$818,630	\$818,630
Ticket Sales			\$691,925	\$691,925
Conference Distribution			\$2,585,373	\$2,585,373
Game Guarantees			\$1,933,000	\$1,933,000
NCAA Distribution			\$2,109,221	\$2,109,221
Facilities/Marketing/etc.			\$350,000	\$350,000
Concessions/Parking/etc.			\$100,000	\$100,000
Total Revenues/Allocations	\$10,352,812	\$9,906,033	\$8,588,149	\$28,846,994
Expenses				
Salaries & Benefits				
Salaries	\$6,614,709	\$705,199	\$156,768	\$7,476,676
Benefits	\$3,175,060	\$338,496	\$75,249	\$3,588,803
Graduate Assistants		\$88,205	\$198,535	\$286,740
Student Wages	\$62,100		\$119,060	\$181,160
Work Study	\$42,857			\$42,857
Supplemental Pay				\$0
	\$9,894,726	\$1,131,900	\$549,612	\$11,576,236
Operating Expenses & Equipment				
Grants in Aid			\$7,726,170	\$7,726,170
Team Travel		\$2,807,956		\$2,807,956
Operational Expenses	\$458,263	\$1,570,606	\$167,454	\$2,196,323
Event Related Expenses		\$1,793,544		\$1,793,544
Game Guarantees		\$934,000		\$934,000
Training Table		\$365,130		\$365,130
Recruiting		\$531,355		\$531,355
Miscellaneous Expenses	\$253,385	\$608,898		\$862,283
I.T. Software / Hardware		\$161,082		\$161,082
	\$711,648	\$8,772,571	\$7,893,624	\$17,377,843
Total Expenses	\$10,606,374	\$9,904,471	\$8,443,236	\$28,954,080
Net Revenues of Expenses	(\$253,562)	\$1,562	\$144,913	(\$107,087)
Prior Year Fund Balance	\$253,562	(\$1,562)	(\$144,913)	\$107,087
Ending Fund Balance, All Funds	\$0	\$0	\$0	\$0

Footnotes:

a) CSU Operating Fund includes ongoing funding awarded in 2018/19 plus GSI adjustments.
For details regarding SJSU Intercollegiate Athletics, visit: www.sjsuspartans.com.

LOTTERY FUND

San José State University will receive an estimated \$2.2 million of lottery revenues in 2019/20 from the CSU. This represents a base increase of \$170K from prior year. 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 state lottery receipts. CSU lottery revenue projections are conservative and usually do not vary significantly from one fiscal year to the next.

The primary programs supported by Lottery Funds are:

- Library Acquisitions (books, periodicals, subscriptions, etc.). The campus has designated \$1.9 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, as well as secondary school students, community college students and undergraduate students who are 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), 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 improve their own skills.

Lastly, the CSU also provides funding support for the California Pre-Doctoral Program which is administered by the Chancellor's Office 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. Two SJSU students were selected as Sally Casanova California Pre-Doctoral Scholars for 2019/20, and each of them will receive a \$3,000 scholarship to support their Pre-Doctoral activities. The campus will also receive \$2,000 for local Pre-Doctoral Program operating/administrative expenses. These funds are generally for the full academic year (September through May).

Lottery Fund 2019/20 Budget

Revenues

CSU Allocation	\$2,221,000
Interest	\$500
Early Assessment Program	\$100,000
Pre-Doctoral Program	\$2,000
Total Revenues	<u>\$2,323,500</u>

Expenses

Operational Costs

University Administrative Overhead	\$165,231
CSU Risk Pool Assessment	\$5,448
	<u>\$170,679</u>

Funded Activities/Programs

University Library Funding	\$1,900,000
Teacher Recruitment Project	\$75,000
CO PY Initiatives (CRT, CourseMatch)	\$24,900
Early Assessment Program	\$309,433
Pre-Doctoral Program	\$2,000
	<u>\$2,311,333</u>
Total Expenses	<u>\$2,482,012</u>

Net Revenues (Expenses) **(\$158,512)**

Prior Year Fund Balances

CO PY Initiatives (CRT, CourseMatch)	\$24,900
Undesignated	\$69,778
Early Assessment Program	\$209,433
Pre-Doctoral Program	\$15,757

Projected Ending Fund Balance **\$161,356**

COLLEGE OF PROFESSIONAL AND GLOBAL EDUCATION (CPGE)

CENTRAL OPERATIONS

The mission of 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. In collaboration with other academic units and with the support of our institutional partners, CPGE initiates and implements new programs and delivery methods to support the educational and workforce needs of local, national, and international communities. We aspire to be a globally recognized college that shapes the future workforce, by preparing students and working professionals with a solid foundation to become engaged, productive members of an evolving global society.

The university programs (degrees, certificates, and courses) which the college extends may be accessed on campus via Open University, Special Session or non-credit bearing continuing education unit offerings. The programs (degrees and certificates) and courses (credit, non-credit, and professional development units) are designed to prepare significant numbers of educated, responsible individuals to contribute to their communities' economy, culture, and future.

Highlights of the 2019/20 Budget

The Professional and Continuing Education (PaCE) revenues for 2019/20 are projected at \$37.4 million which includes non-credit revenues. Following the current revenue distribution model, approximately \$30.3 million will be allocated as shared costs to campus partners (i.e. Divisions of Administration & Finance, Student Affairs, and Academic Affairs).

Enrollment growth in professional degree and certificate programs is of strategic importance to the future of the university and our college, particularly in our mission to support the ever-evolving workforce and industry demands. Marketing is an integral element of any enrollment growth strategy, plan, and execution. We are partnering with marketing and enrollment service providers to develop marketing and communications plans to increase enrollment numbers for our graduate degree and certificate programs.

Facility (classroom and laboratory space) and infrastructure (faculty, instructors and support staff) continue to be the strongest barriers to grow and sustain programs beyond the current cohort sizes. The new Interdisciplinary Science Building (ISB) will increase our classroom and laboratory capacity in STEM programs when the facility is ready for occupancy in early 2022.

In addition to the infrastructure challenges to accommodate expanding programs, we are also facing challenges in state authorizations for online and internship offerings. In the areas of non-resident student recruitment and online education, Bay Area universities and Silicon Valley campuses of other reputable institutions (e.g., Carnegie Mellon, Northeastern, and UC Santa Cruz) pose strong 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 pursue the development of new professional degree and certificate programs, as well as to invest in our facilities, faculty and staff.

College of Professional and Global Education (CPGE) Central Operations 2019/20 Budget

	Central Operations	Study Abroad and Away	Total
Revenues			
Revenues	\$7,010,003	\$1,454,723	\$8,464,726
Interest		\$16,606	\$16,606
Total Revenues	\$7,010,003	\$1,471,329	\$8,481,332 (a)
Expenses			
Salaries and Benefits			
Salaries and Staff Benefits	\$5,064,330	\$453,423	\$5,517,753
Student Assistants	\$105,352	\$14,400	\$119,752
	\$5,169,682	\$467,823	\$5,637,505
Operating Expenses & Equipment			
Communications	\$11,950		\$11,950
Travel	\$32,639	\$13,880	\$46,519
Subscriptions	\$0		\$0
Contractual Services	\$836,032	\$683,075	\$1,519,107 (b)
Information Technology	\$68,363	\$5,000	\$73,363
Postage	\$0		\$0
Printing	\$50,000		\$50,000
Supplies	\$235,000		\$235,000
Training & Prof Dev.	\$136,500		\$136,500
Advertising	\$179,697		\$179,697
Space Rental	\$242,672		\$242,672
Recruitment & Relocation	\$18,420		\$18,420
Memberships Due	\$1,759		\$1,759
Other Operating	\$24,789	\$189,855	\$214,644
	\$1,837,821	\$891,810	\$2,729,631
Total Expenses	\$7,007,504	\$1,359,633	\$8,367,136
Net Revenue (Expense)	\$2,499	\$111,696	\$114,196
Allocation of Division Capital Projects ISB	(\$400,000)		(\$400,000)
Allocation of Tuition Revenue		(\$49,894)	(\$49,894) (c)
Prior Year Fund Balance	\$2,990,008	\$810,592	\$3,800,600
Projected Ending Fund Balance	\$2,592,507	\$872,394	\$3,464,902

Footnotes:

(a) Projected Central Operations revenue allocation from credit programs (special session and summer and winter intersession) and non credit programs.

(b) Contractual services for faculty-led study abroad is for the program expenses for students and faculty travel, lodging, insurance and other program specific expenses budgeted and funded from program fees.

(c) 10% of faculty-led study abroad tuition program revenue is distributed to partner colleges and 5% to SAA unit.

PROFESSIONAL AND CONTINUING EDUCATION FUND (PACE)

The College of Professional and Global Education (CPGE) manages professional and continuing education programs to meet the needs of the University and serve the contemporary workforce demands of the region and the world.

Professional Education programs (degrees and certificate) and courses (credit, non-credit, and continuing education units) are designed to educate and build competencies which lead to gainful employment and develop engaged, productive members for our communities. These programs and courses 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 (e.g., traditional students, re-entrants to the workforce, career changers, and working professionals) have access to CPGE's program offerings.

For fiscal year 2018/19, PaCE revenue, generated through the various program streams increased six percent over prior year (see table below). The increase in gross revenue was directly related to an increase in enrollment, student credit units and FTES during the year. CPGE had the largest enrollment of student (headcounts) amongst the twenty-three campuses in fall 2018 (2,489 in fall 2017 and 2,647 in fall 2018).

PaCE Program	FY 2017/18	FY 2018/19	YOY % Change
Open University	\$ 2,810,677	\$ 2,633,124	-3%
Special Session	\$ 21,810,789	\$ 22,984,582	5%
Winter Session	\$1,810,644	\$ 1,969,627	9%
Summer Session	\$6,923,428	\$ 7,753,056	12%
Faculty Led Study Abroad	\$1,136,399	\$ 1,264,977	11%
Non-Credit	\$281,334	\$ 221,828	-21%
Total PaCE	\$ 34,773,271	\$ 36,827,194	6%

Two new programs launched in fall 2018 were:

- MS Data Analytics, a 30-unit hybrid degree program offering an interdisciplinary comprehensive curriculum and the first academic degree program owned by CPGE
- MS Software Engineering, Specialization in Data Sciences, a program offered by College of Engineering

New programs approved for self-support delivery in 2018/19 and open for fall 2019 admission are:

- MS Informatics, a 30-unit online degree program
- Advanced Certificate in Facilities Management, a 12-unit certificate

To foster global competencies in our students through innovative curricular and to meet the embedded "international experience" requirements in some majors across campus, CPGE, through its Study Abroad and Away unit launched two pilot pathways to build capacity in short-term study abroad programs. The two pathways, namely, direct enroll summer school abroad programs and the winter term faculty-led study abroad programs will offer a variety of course options to support more majors across the university.

Professional and Continuing Education Fund (PaCE) 2019/20 Budget

	Academic Affairs	Administration & Finance	Student Affairs	University Wide	Faculty-Led Study Abroad	Total
Revenues						
Credit Revenues						
Open University		\$289,644	\$92,159	\$2,251,321		\$2,633,124 (a)
Special Session	\$19,927,633	\$2,578,870	\$820,550	\$117,221		\$23,444,274
Winter Session (intersession)	\$1,674,183	\$216,659	\$68,937	\$9,848		\$1,969,627
Summer Session (intersession)	\$6,655,999	\$861,365	\$274,071	\$39,153		\$7,830,587
Faculty Led Study Abroad					\$1,454,723	\$1,454,723 (b)
	\$28,257,815	\$3,946,537	\$1,255,716	\$2,417,543	\$1,454,723	\$37,332,335
Other Revenues						
Non Credit Revenue	\$108,550					\$108,550
Early Start Program	\$175,720					\$175,720
Interest				\$425,804	\$16,606	\$442,410
	\$284,270	\$0	\$0	\$425,804	\$16,606	\$726,680
Total Revenues	\$28,542,085	\$3,946,537	\$1,255,716	\$2,843,348	\$1,471,329	\$38,059,015
Total Expenses	\$25,949,578	\$3,946,537	\$1,255,716	\$1,347,785	\$1,359,633	\$33,859,249
Net Revenue (Expense)	\$2,592,507	\$0	\$0	\$1,495,563	\$111,696	\$4,199,766
Transfer In (Out)					(\$49,894)	(\$49,894) (c)
Prior Year Fund Balances/Reserves						
Operating Reserve	\$3,551,795					\$3,551,795
Moving Fund Reserve	\$0					\$0
Facility Reserve	\$638,266					\$638,266
Program Development	\$1,354,923					\$1,354,923
Total Prior Yr Reserves	\$5,544,984	\$0	\$0	\$0	\$0	\$5,544,984
Total Prior Yr Fund Balance	\$17,839,284	\$0	\$1,385,764	\$2,598,360	\$810,592	\$22,634,000 (d, e)
Projected Ending Fund Balance	\$23,384,268	\$0	\$1,385,764	\$2,598,360	\$810,592	\$28,178,985

Footnotes:

(a) Academic Affairs receives Open University revenue in CSU Op fund and the balance is set aside for the university to use on capital projects or other strategic initiatives.

(b) 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.

(c) 10% of Study Abroad tuition revenue to be distributed to the "home" academic college and 5% to CPGE supporting units allocated towards SAA operating funds.

(d) U-wide balance includes 41% of summer 2019 revenue, posted to 2018/19 (\$5.45 million) at year-end for GAAP reporting, to be allocated to campus partners in 2019/20.

(e) Study Abroad balance will fund "soft" encumbrances for summer 2019 program expenses (approx. \$683K) for students and faculty travel, lodging, etc.

STUDENT HEALTH CENTER

The Student Health Center (SHC) provides services and education for registered students and consultative services for the campus. The SHC mission states: "Together we enhance community health and well-being in support of student learning."

SHC goals are to:

- Provide student health and wellness services, including primary care, limited specialty care, health promotion, disease prevention, support services (laboratory, pharmacy, physical therapy, radiology, nutrition), and mental health services;
- Promote accountability and responsibility for the health and well-being of the student community; and
- Leverage expertise and resources in collaborative support of campus strategic priorities, including wellness initiatives.

Highlights about the SHC

The "Student Health Service" for the San José Normal School was officially organized in 1912 and has grown to be a fully-accredited, outpatient clinic and a center for student development. The SHC has served the students and campus for over 100 years. Approved by a wide margin in a 2001 student referendum, the Health Services Fee remains the principal funding source for SHC services.

Due to Student Health Center strategic leadership, the Division of Student Affairs now has a state of the art 50,000 sq. ft. student services facility which is an SJSU point of pride and is energy efficient. The facility provides space for a wider range of student health, wellness, and counseling services training and education in an interactive, collaborative, culturally inclusive, and holistic manner that are aligned with the missions of the CSU, SJSU, and the Division of Student Affairs.

Recent accomplishments include the following:

- Continued development of campus wide collaborations supporting student engagement and education (i.e. Alcohol and Drug Abuse Prevention Committee, Sexual Assault and Alcohol Education, the National Collegiate Health Survey);
- Expanded use of secure electronic health records (i.e. online student messaging, appointments, and fee payment options);
- Support for developing the campus response to immunization requirements; and
- A more consistent CSU organizational approach to having health services on 23 campuses.

In 2018/19, the SHC clinical services and wellness programs each recorded over 18,107 student visits. Counseling and Psychological Services (CAPS) has also seen annual increases in the number of students for utilizing its services. In 2018/19, CAPS served 2,670 students who attended 10,716 individual and group appointments. The number of students CAPS served increased 7% over the prior year.

During 2018/19 there was a realignment of the Student Health Services and Facility fees to ensure funding for quality services without a net increase to the mandatory health-related student fees. In addition to primary care services, SHC also offers specialty services (dermatology, podiatrist, travel, sports medicine) and lab services for a fee.

Student Health Center (SHC) 2019/20 Budget

	Health Services (incl Mental Health)	Augmented Health Services (Fee for Service)	Facilities	Capital Improvements / Maint & Repair	SHC Total
Revenues					
Student Fees	\$12,681,025	\$411,000	\$2,334,489		\$15,426,514
Interest	\$115,000	\$12,000	\$153,286		\$280,286
Total Revenues	\$12,796,025	\$423,000	\$2,487,775	\$0	\$15,706,800
Expenses					
Salaries	\$7,433,222				\$7,433,222
Benefits	\$3,642,473				\$3,642,473
Subtotal Salaries and Benefits	\$11,075,695	\$0	\$0	\$0	\$11,075,695
Operating Expenses & Equipment	\$1,019,264	\$544,950	\$185,276	\$1,200,000	\$2,949,490
SJSU Overhead / CSU Chargebacks	\$1,190,193	\$14,800	\$390,779		\$1,595,772
Total Expenses	\$13,285,152	\$559,750	\$576,055	\$1,200,000	\$15,620,957
Repairs & Maintenance Transfers (Out)			(\$1,200,000)	\$1,200,000	\$0
Capital Improvement Transfers					\$0
Operating Fund					\$0
Debt Service Payments			(\$1,470,000)		(\$1,470,000)
Net Revenue (Expense)	(\$489,127)	(\$136,750)	(\$758,280)	\$0	(\$1,384,157)
Prior Year Fund Balance	\$6,717,970	\$703,446	\$7,546,281	\$3,141,421	\$18,109,118
Projected Ending Fund Balance	\$6,228,843	\$566,696	\$6,788,001	\$3,141,421	\$16,724,961

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's practices promote efficiency, operational effectiveness, and fiscal responsibility. UHS currently hosts over 4,000 residents.

UHS is comprised of Residential Life (including Faculty in Residence), Administration and Financial Operations, Organization & 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
- Damage fees, application fees, late fees, license processing fees, parking fees from CV garage
- Rent and utilities from Chartwells for the use of the Village Market

2018/2019 Accomplishments

New security implementations for guests checking into the residence halls began in January 2019. This was accomplished by having (2) desk staff members available at our building's front desks. The check-in process of guests was enhanced and technological connectivity improvements have been made to most housing buildings.

2019/2020 Housing Budget

The 2019/20 UHS year-end balance is projected to be a positive \$9.9 million. This projection is based upon the university-approved 3% rent rate increase and ongoing average occupancy rate of 108%. \$4.4 million is a planned transfer in 2019/20 to the Housing Maintenance and Repair Fund. This amount may increase due to the need to update all building to the S2 access system as well as beginning the process to update several floors at a time in Joe West Hall. All of our projects will continue to focus primarily on life safety, end-of-life cycle replacement items, and, when fiscally possible and prudent, any renovations. In addition, we are creating a long term plan that will assist us in future innovation and housing plans.

We are also in the process of creating an SII integration access system with our internal student database to facilitate in a faster check in system for our residents.

UHS continues to review fire life safety compliance and address any issues as necessary with the proper authorities.

A number of new and necessary positions were approved for the 2019/20 year, and the process to fill these positions is currently underway. Salary and benefits for these positions were included in the 2019/20 budget projections.

University Housing Services 2019/20 Budget

Revenues

Student Housing Rent	\$46,673,956
Conference and Overnight Guests	\$1,750,000
Other Revenues	\$550,000
Miscellaneous Student Fees	\$658,000
Auxiliaries Rent Revenues	\$342,000

Total Revenues	\$49,973,956
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Expenses

Salary and Benefits

Salaries and Wages	\$3,932,604
Benefits	\$2,658,171
Student Assistants	\$2,694,078
	\$9,284,853

Operating Expenses & Equipment

General Supplies/Services	\$2,831,256
Equipment/Furniture Replacement	\$200,650
Insurance Premiums	\$343,300
Internet/Cable (UTS)	\$1,240,987
Repairs, Maintenance & FD&O Services	\$5,756,455
Utilities	\$3,883,883
Payments to Service Providers:	
Business Services	249,834
CSU Centrally Paid Costs	\$79,500
Ground Lease Fees	\$342,953
Security (UPD)	\$630,299
Debt Service (a)	\$22,847,581

Total Expenses	\$47,691,551
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Transfer in from Parking Trust Fund	\$580,000
Transfer out to Housing Maintenance and Repair Fund	(\$4,400,000)
Net Revenue (Expense)	(\$1,537,595)

Prior Year Fund Balance	\$5,930,657
Housing Operations Reserve Fund Balance	\$5,527,917
Projected Ending Fund Balance (b)	\$9,920,979

Footnotes:

(a) Systemwide Revenue Bond (SRB) debt for Campus Village I and II.

(b) 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 the 2019/20 Budget

Parking fee revenue for fiscal year 2019/20 is expected to decrease by 5% over the prior year. This reduction in revenue is attributed to the efforts of Parking Services staff redirecting commuters to utilize the resources available through the Valley Transit Authority (VTA) and the loss of parking through construction events. Parking Services initiated this action as a means of mitigating the unsustainable parking demands impacting the existing parking facilities. We also anticipate greater compliance to parking regulations as the campus' License Plate Recognition (LPR) System is allowed to go completely on line. This greater adherence to parking regulations is anticipated to result in a 5% reduction in fine and forfeiture revenue.

San Jose State University plans to expand parking inventory by 1,500 spaces with the construction of a new four story parking garage located on the South Campus. Alongside the garage, a new sports field with a turf surface and evening lights will also be constructed for recreation and intramurals, with restrooms and storage rooms incorporated into the garage structure. The parking garage and field facility is anticipated to open in late fall 2020.

Parking Services will need to purchase key capital equipment for the new South Campus parking garage such as additional permit dispensers and LPR cameras. In addition buses will also be purchased to assist in transporting our students, faculty, and staff from the South Campus parking garage to Campus.

University Parking Services 2019/20 Budget

	Parking Fees	Fines & Forfeitures	Capital Projects	Special Events	Total
Revenues					
Parking Permits	\$5,426,400				\$5,426,400
Parking Coingates	\$300,000				\$300,000
Parking Fines		\$330,450			\$330,450
Revenue-Others	\$18,000				\$18,000
Interest	\$155,000	\$100			\$155,100
Cost Recovery from Auxiliaries	\$115,000			\$22,440	\$137,440
Cost Recovery from Others	\$60,000			\$5,100	\$65,100
Total Revenues	\$6,074,400	\$330,550	\$0	\$27,540	\$6,432,490
Expenses					
Salaries & Wages	\$1,123,760	\$25,000		\$18,831	\$1,167,591
Benefits	\$726,866			\$1,014	\$727,880
	\$1,850,626	\$25,000	\$0	\$19,845	\$1,895,471
Operating Expenses & Equipment					
Charges for Business Services	\$1,152,293	\$26,436			\$1,178,729
Contractual Services (a)	\$140,000	\$250,000	\$5,380,122		\$5,770,122
Communications	\$1,200				\$1,200
Equipment	\$431,000				\$431,000
General Operating Expenses	\$472,759	\$13,000			\$485,759
Printing/Duplicating	\$62,350	\$10,000			\$72,350
Facility Upkeep	\$578,000				\$578,000
Utilities	\$216,829				\$216,829
Merchant's Credit Card Fee	\$170,000				\$170,000
Insurance & Risk Expenses	\$90,872				\$90,872
UPD Security	\$1,169,456				\$1,169,456
	\$4,484,759	\$299,436	\$5,380,122	\$0	\$10,164,317
Total Expenses	\$6,335,385	\$324,436	\$5,380,122	\$19,845	\$12,059,788
Transfers In (Out)					
Parking Fees			\$93,453		\$93,453
Construction	(\$93,453)				(\$93,453)
Total Transfers In (Out)	(\$93,453)	\$0	\$93,453	\$0	\$0
Net Revenues (Expenses)	(\$354,438)	\$6,114	(\$5,286,669)	\$7,695	(\$5,627,298)
Prior Year Fund Balance	\$2,046,545	\$38,749	\$5,809,640	\$66,191	\$7,961,125
Projected Ending Fund Balance	\$1,692,107	\$44,863	\$522,971	\$73,886	\$2,333,827

Footnotes:

(a) The figure in the construction fund represents expenditures related to North, South and South Campus Parking Garage construction projects.

For details regarding Parking, visit: <http://www.sjsu.edu/parking>.

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Photo by Robert Bain

Auxiliary Organizations

- Associated Students
- Research Foundation
- Spartan Shops, Inc.
- Student Union, Inc.
- Tower Foundation

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ASSOCIATED STUDENTS

The Associated Students San José State University 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. The core functions are described below.

Government

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.

Retention

Provide access and retention for San José State University students through funding of parental information resources and quality care for their pre-school age children, as well as providing scholarships and financial support to student academic projects and organizations.

Campus Life

Enhance students' academic experiences through programmed educational and entertainment events with cross cultural exposure to music, films and school pride. Providing co-curricular experiences through service learning and volunteering and bringing activism to life.

Support Services

Assist the University in fulfilling the service needs of students by providing full and self-print and copy services, course reader distribution, electronic bill payment, affordable textbook program, and funds management for student organizations.

Technology & Resources

Provide students with a full service computer lab where they can complete homework and research assignments, use multiple operating systems, explore a variety of course related and leisure software, utilize a wireless network, rent laptops, and print materials; an on-campus solution for all copying and printing needs for both students and the campus community.

Transportation

Serve the commuting needs of the students and employees of San Jose State University by facilitating public transit access, ride sharing, and biking to campus. We provide alternative transportation services and incentives including the deeply discounted SmartPass Clipper Card for VTA buses and Light Rail, discounted regional transit passes, carpool matching, trip planning, and safe bicycle enclosures.

Facilities

Manage the Associated Students House, a child development center, and bike enclosures.

Associated Students 2019/20 Budget

	Government	Retention	Campus Life	Support Services	Technology & Resources	Transportation	Facilities	Total
Revenues								
Student Association Fees (a)	\$700,920	\$1,274,400	\$1,019,520	\$764,640	\$955,800	\$1,210,680	\$446,040	\$6,372,000
Program Revenues	\$191,554	\$348,281	\$278,624	\$208,968	\$261,210	\$330,867	\$121,898	\$1,741,403
Grants and Contracts	\$90,282	\$164,149	\$131,319	\$98,489	\$123,112	\$155,941	\$57,452	\$820,744
Total Revenues	\$982,756	\$1,786,829	\$1,429,464	\$1,072,098	\$1,340,122	\$1,697,488	\$625,390	\$8,934,147
Expenses								
Compensation for Officers and Directors	\$29,766	\$54,120	\$43,296	\$32,472	\$40,590	\$51,414	\$18,942	\$270,600
Salaries and Wages	\$314,040	\$570,982	\$456,785	\$342,589	\$428,236	\$542,433	\$199,844	\$2,854,909
Salaries - Student Assistants	\$148,935	\$270,790	\$216,632	\$162,474	\$203,093	\$257,251	\$94,777	\$1,353,951
Staff Benefits	\$117,832	\$214,240	\$171,392	\$128,544	\$160,680	\$203,528	\$74,984	\$1,071,200
Total Salary and Benefits	\$610,573	\$1,110,132	\$888,106	\$666,079	\$832,599	\$1,054,625	\$388,546	\$5,550,660
Operating Expenses & Equipment								
Accounting and Legal Fees	\$7,568	\$13,760	\$11,008	\$8,256	\$10,320	\$13,072	\$4,816	\$68,800
Affordable Textbook Program	\$3,850	\$7,000	\$5,600	\$4,200	\$5,250	\$6,650	\$2,450	\$35,000
Janitorial Services	\$6,017	\$10,940	\$8,752	\$6,564	\$8,205	\$10,393	\$3,829	\$54,700
CSU Operating Fund Admin Services	\$13,816	\$25,120	\$20,096	\$15,072	\$18,840	\$23,864	\$8,792	\$125,602
Food Services	\$8,368	\$15,214	\$12,171	\$9,128	\$11,411	\$14,453	\$5,325	\$76,070
Other Operating Expenses	\$20,510	\$37,291	\$29,832	\$22,374	\$27,968	\$35,426	\$13,052	\$186,453
Publicity and Promotion	\$7,090	\$12,891	\$10,313	\$7,735	\$9,669	\$12,247	\$4,512	\$64,457
Rental Charges	\$21,532	\$39,149	\$31,319	\$23,490	\$29,362	\$37,192	\$13,702	\$195,746
Repairs & Maintenance	\$2,057	\$3,740	\$2,992	\$2,244	\$2,805	\$3,553	\$1,309	\$18,700
Risk Coverage/Insurance	\$4,306	\$7,828	\$6,263	\$4,697	\$5,871	\$7,437	\$2,740	\$39,142
Staff Development and Hospitality Svcs	\$11,005	\$20,009	\$16,007	\$12,006	\$15,007	\$19,009	\$7,003	\$100,046
Student Orgs & Spartan Community Program	\$29,700	\$54,000	\$43,200	\$32,400	\$40,500	\$51,300	\$18,900	\$270,000
Student Grants & Scholarships	\$8,470	\$15,400	\$12,320	\$9,240	\$11,550	\$14,630	\$5,390	\$77,000
Contracts and Services	\$49,149	\$89,361	\$71,489	\$53,617	\$67,021	\$84,893	\$31,276	\$446,807
Telephones/Baseline Charges	\$19,597	\$35,630	\$28,504	\$21,378	\$26,723	\$33,849	\$12,471	\$178,150
Transportation Solutions Program	\$140,800	\$256,000	\$204,800	\$153,600	\$192,000	\$243,200	\$89,600	\$1,280,000
Travel	\$8,666	\$15,756	\$12,605	\$9,454	\$11,817	\$14,968	\$5,515	\$78,780
Utilities	\$6,512	\$11,840	\$9,472	\$7,104	\$8,880	\$11,248	\$4,144	\$59,200
Operating Capital Outlay	\$550	\$1,000	\$800	\$600	\$750	\$950	\$350	\$5,000
Total Operating Expenses	\$369,562	\$671,931	\$537,544	\$403,158	\$503,948	\$638,334	\$235,176	\$3,359,653
Total Expenses	\$980,134	\$1,782,063	\$1,425,650	\$1,069,238	\$1,336,547	\$1,692,959	\$623,722	\$8,910,313
Net Revenues over Expenses (operating)	\$2,622	\$4,767	\$3,813	\$2,860	\$3,575	\$4,528	\$1,668	\$23,834
Prior Year Fund Balance								\$10,876,403
OPEB-Postretirement Health Benefit Program								\$0
Depreciation								(\$267,470)
AS House Lease								(\$148,430)
Projected Ending Fund Balance								\$10,484,337

Footnote:
(a) Student Association Fee \$98.00.

RESEARCH FOUNDATION

The San José State University Research Foundation is a 501(c)(3) non-profit corporation and plays an integral part of the San José State University community. We provide an entrepreneurial framework through which local, state and federal agencies, businesses and private foundations engage SJSU faculty and students. This is done through sponsored research, public service and community projects, consulting and other specialized educational activities in support of the university's mission.

Research Foundation fosters the university's quest for excellence by:

- 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. Developing unique strategies to secure support for interdisciplinary programs related to the role of SJSU as a "metropolitan university."
- 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, art museums, historical societies, and other appropriate venues.
- Delivering specialized business services by administering funds for campus programs. Seeking opportunities to manage monies for other CSU/campus auxiliaries and/or public agencies and maintaining a diversified investment portfolio using targeted investment advisors.
- Developing partnerships with the community by establishing and/or supporting business partnerships consistent with the role of SJSU as a "metropolitan university." Providing legal and administrative structures for new ventures with business, industry, and community organizations, including acquisition and management of real property.

Each year hundreds of local, state, and federal agencies, businesses, and private foundations partner with the Research Foundation to engage SJSU faculty and other university specialists to perform basic and applied research, public service and community projects, consulting, and other specialized educational activities.

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

Research Foundation 2019/20 Budget

Revenues

Fees	\$8,300,000
Investment Income	\$800,000
Federal Grants and Contracts	\$26,000,000
State Grants and Contracts	\$7,500,000
Private Gifts, Grants and Contracts	\$6,600,000
Other Revenue Activities - Campus Organizations (a)	\$6,200,000
Other Revenue and Support	\$100,000
Total Revenues	\$55,500,000

Expenses

Salary and Benefits

Salary and Wages	\$27,000,000
Staff Benefits	\$7,500,000
Postretirement Benefits - Accrued Expense	\$750,000
	\$35,250,000

Operating Expenses & Equipment

Depreciation	\$1,000,000
Equipment Purchase	\$300,000
Equipment Rent and Lease	\$80,000
University Admin. Services & Facilities Use	\$550,000
Occupancy (Rent, Janitorial, Utilities, Insurance)	\$1,300,000
Printing	\$50,000
Building Repairs and Maintenance	\$300,000
Scholarships and Fellowships	\$3,500,000
Supplies	\$1,600,000
Telephones/Communications	\$400,000
Travel	\$2,300,000
Contracted Services and Fees (b)	\$8,000,000
Professional Fees (Accounting and Legal)	\$600,000
Net Alloc/Grants/Transfers to Related Entities	\$0
	\$19,980,000

Total Expenses **\$55,230,000**

Net Revenue (Expense)

Projected Prior Year Fund Balance

Projected Ending Fund Balance

\$270,000

\$16,964,712

\$17,234,712

Footnotes:

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

(b) Contracted services and fees are grants and contracts or sub-contracted to other universities, organizations and individuals.

For more information about Research Foundation finances, operations, etc., visit <http://www.sjsufoundation.org>.

SPARTAN SHOPS, INC.

Spartan Shops is a not-for-profit (501c3) campus benefit corporation founded in 1956 for the purpose of providing support services to the San José State University (SJSU) campus community. These services include bookstore management, dining services management, golf complex management and 13 rental units for faculty and staff.

Spartan Shops is comprised of four major divisions:

Bookstore Management

In April 2011, Spartan Shops entered into an agreement with Barnes & Noble College Booksellers to operate Spartan Bookstore for a period of ten years. In July 2015, Spartan Shops extended the agreement with Barnes & Noble to operate Spartan Bookstore until June 30, 2026. Spartan Bookstore offers course materials and related items to our students and campus community.

Dining Service Management

In September 2018, Spartan Shops entered into an agreement with Chartwells Higher Education, a division of Compass Group USA, Inc. to provide and manage Spartan Shops' food service program on the campus of San José State University for two years under Earned Management Fee basis with an option of two five-year Profit and Loss contract extensions. In July 2018, Chartwells assumed responsibility for the residential meal program incorporated within The Commons, retail foodservice operations located on the SJSU Main campus, concession services at the Event Center, SJSU South Campus and Hammer Theater, and catering services.

Spartan Golf Complex Management

In September 2017, Spartan Shops entered into an agreement with Tower Real Estate Fund (TREF) for the management of daily operations of the Spartan Golf Complex at Spartan Village Project Facility for a period of five years, effective July 1, 2017 through June 30, 2022. The Spartan Golf Complex is intended primarily for the use of the San José State University Men's and Women's Golf Teams, and is operated in accordance with all NCAA rules and regulations. Unaccompanied guests are not permitted on site.

Friends of Spartan Golf and their guests, however, will be able to enjoy the facilities when the teams are not using them for practice. To learn more about Friends of Spartan Golf, or to schedule a tour of the Spartan Golf Complex, please visit: <http://spartangolfcomplex.com/>.

Commercial Services

This division includes Real Estate Services provided to SJSU faculty and staff. Spartan Shops' Real Estate division provides 13 off campus rental housing units at affordable rates for SJSU faculty and staff.

Spartan Shops, Inc. 2019/20 Budget

	Amount	% of Total Resources
Resources		
Sales		
Spartan Golf Complex	\$55,300	1.37%
Real Estate	\$230,365	5.71%
Total Sales	\$285,665	7.09%
Cost of Sales		
Spartan Golf Complex	\$44,660	1.11%
Less: Total Cost of Sales	\$44,660	1.11%
Gross Profit	\$241,005	5.98%
Other Income		
Bookstore Commission	\$700,272	17.37%
Dining Services Net Revenues	\$1,125,049	27.91%
Golf Complex Commissions and Facility Rental	\$46,020	1.14%
Interest Income	\$78,560	1.95%
Other Income	\$77,180	1.91%
Tower Foundation Expense Reimbursement	\$914,911	22.69%
Miscellaneous Income	\$848,501	21.05%
Total Other Income	\$3,790,493	94.02%
Total Resources	\$4,031,498	100.00%
Expenses		
Salary & Benefits	\$693,658	17.21%
Operating Expenses		
Depreciation	\$1,635,507	40.57%
Travel and Meeting	\$3,100	0.08%
Supplies	\$13,900	0.34%
Repair & Maintenance	\$139,000	3.45%
Utilities	\$255,915	6.35%
Advertising & Events	\$7,200	0.18%
University Donations	\$16,200	0.40%
Services	\$1,063,289	26.37%
Equipment	\$28,832	0.72%
Rent - University	\$915,000	22.70%
Facility Fee - Event Center	\$80,000	1.98%
Insurance	\$164,615	4.08%
Bank Service Charge	\$12,200	0.30%
Tax and Licenses	\$7,400	0.18%
Laundry and Uniform	\$3,410	0.08%
Staff Recruitment & Training	\$4,240	0.11%
Other Expenses	\$529,230	13.13%
Dining Services Management Fees	\$400,000	9.92%
Total Operating Expenses	\$5,279,039	130.94%
Total Expenses	\$5,972,696	148.15%
Net Loss	(\$1,941,198)	-48.15%
Prior Year Fund Balance	\$6,818,503	
Projected Ending Fund Balance	\$4,877,305	

Footnotes:

For more information about Spartan Shops finances, operations, etc., visit <http://www.spartanshops.com>.

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 maintains three major facilities at SJSU: the newly remodeled Student Union Building with its new East and West expansions, the Provident Credit Union Event Center Building, and the Spartan Recreation and Aquatic Center, opened in April of 2019. Students interact with the Student Union on a daily basis through the use of facilities, participation in sponsored events, or through Student Union programs. The Student Union also acts as a bridge to the greater campus community, offering use of recreational facilities, diverse concerts and events on campus.

The Student Union is governed by a Board of Directors composed of eleven (11) voting members:

- Students – Six (6)
- Faculty – Two (2)
- Administrators – Two (2)
- Community Member – One (1)

Revenue sources include the mandatory Student Union fee, as well as revenues earned from various services offered, and rental of the facilities. These revenues support the costs of operating the facilities, major and minor capital projects, and the annual debt service payments. Revenues from the mandatory Student Union fee collected by the University on behalf of the Student Union are projected to be approximately \$24 million in 2019/20. The balance of the collected student fees are held in trust by San José State University and will be used to pay for the new Student Recreation & Aquatic Center Project (SRAC) as well as debt related to the expansion/renovation of the Student Union, which is \$9,254,356 for 2019/20.

Generating income from programs, services, and facility rentals continues to be a priority due to the increasing operational needs of the existing facilities. The Board-approved balanced budget for 2018/19 includes revenues and expenses totaling \$16,296,255 (including the return of \$11,564,085 in student fees from the University trust to fund operations) plus an additional amount of \$290,491 in capital projects.

Services listed below include the new East and West Student Union expansions, New Student Union Main, Provident Credit Union Event Center, and the 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 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.
2019/20 Operating Budget

	General Administration	Student Union Building	Event Center Building	SRAC Center	Total Budget
Revenues					
Student Union Fees	\$ 11,564,085	\$ -	\$ -	\$ -	\$ 11,564,085
Service Fees		414,460	48,700	598,268	1,061,428
Reimbursement of Event Costs			830,000		830,000
Interest Income	275,000				275,000
Rental Income		1,449,742	971,000	130,000	2,550,742
Commissions & Other	15,000	-	-	-	15,000
Total Operating Revenues	\$ 11,854,085	\$ 1,864,202	\$ 1,849,700	\$ 728,268	\$ 16,296,255
Expenses					
Salaries and Wages	\$ 2,083,822	\$ 987,953	\$ 877,297	\$ 2,163,241	\$ 6,112,313
Staff Benefits	1,370,519	370,598	192,203	271,499	2,204,819
Total Salaries & Benefits	\$ 3,454,341	\$ 1,358,551	\$ 1,069,500	\$ 2,434,740	\$ 8,317,132
Operating Expenses & Equipment					
Travel	\$ 45,243	\$ 8,717	\$ 25,966	\$ 21,698	\$ 101,624
Risk Coverage/Insurance	453,286	600	21,011	-	474,897
Supplies	105,828	128,550	148,181	145,786	528,345
Communications	231,500	2,220	-	-	233,720
Repairs and Maintenance	19,557	60,261	67,788	24,767	172,373
Event Costs-(Reimb. Portion)	-	-	831,250	-	831,250
Programming Costs	292,450	2,000	39,400	40,225	374,075
Utilities	-	622,800	806,057	418,089	1,846,946
Small Equipment Purchases	29,306	31,305	32,000	14,600	107,211
Services from Outside Agencies	1,160,868	150,204	128,089	772,825	2,211,986
Depreciation	750,700	-	-	-	750,700
OPEB Obligation	243,793	-	-	-	243,793
Staff Development & Other	40,708	13,825	13,950	33,720	102,203
Total Operating Expenses	\$ 3,373,239	\$ 1,020,482	\$ 2,113,692	\$ 1,471,710	\$ 7,979,123
Total Operating Expenses	\$ 6,827,580	\$ 2,379,033	\$ 3,183,192	\$ 3,906,450	\$ 16,296,255
Total Operating Income (Loss):					\$ -

LOCAL RESERVES

Funding of Special Projects	\$ 290,491 (a)
Increase/(Decrease) in Net Position	290,491
Estimated Net Position Beginning of Year	\$ 10,308,520
Long Term Investment funds (Unrestricted)	\$ 6,972,445
Investment in Capital Assets	\$ 3,364,740
Board-Designated	\$ 949,520
Estimated Net Position End of Year	\$ 11,286,705

Footnote:

(a) FY 2019/20 Capital Projects

	Project Costs:
Boom Lift for SRAC	\$ 100,000
Power Distribution System for EC arena	29,875
Website Design for Event Center arena	15,500
Renovate the current aerobics room in the Sports Club to become a VIP/Meet and Greet/Chalk Talk	55,000
Fiber Installation for EC arena	20,700
Fall Arrest System for EC area	69,416
	\$ 290,491

Additional information regarding the Student Union Inc. is available at www.union.sjsu.edu.

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.

Our campus unveiled its new strategic plan, Transformation 2030, and is eager to work toward achieving the goals in the plan. There is great enthusiasm about the campus's new look and future capital projects on the horizon.

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 \$153 million endowment is comprised of over 650 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.

Earlier this year, the Tower Foundation board of directors approved a 4% endowment distribution, directing over \$5.8 million to the campus for scholarships, faculty support and the programs our donors have made possible. Tower Foundation remains confident that its endowment investment portfolio is well positioned, from both a risk and a return standpoint, to support SJSU and its growth in the future.

Tower Foundation 2019/20 Budget

Revenues

Endowment Gifts	\$4,000,000
Gifts & Pledges	\$14,000,000
Bequests	\$10,000,000
Nonmonetary Gifts	\$500,000
Other Investment & Non-operating Revenues	\$3,800,000 (a)
Total Revenues	\$32,300,000

Expenses

Tower Operating Expenses

Tower Operating Expenses	\$3,693,313
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Tower Program Distributions

SJSU Program Activities	\$16,105,000 (b)
SJSU Endowment Distributions	\$5,800,000 (c)
SJSU Outreach Funds	\$217,500 (d)
	\$22,122,500

Restricted Funds & Reserves

Restricted Endowments	\$4,000,000
Restricted Pledges & Bequests	\$2,000,000
Operating & Campaign Reserves	\$484,187
	\$6,484,187

Total Expenses	\$32,300,000
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Net Revenue of Expenses	\$0
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Prior Year Fund Balance	\$207,051,127
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Projected Ending Fund Balance	\$207,051,127
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Footnotes:

(a) 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.

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

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

(d) Community relations funds providing support to SJSU leadership for outreach activities.

For more information about Tower Foundation finances, visit

<http://www.sjsu.edu/towerfoundation/about/financials/index.html>

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Photo by David Schmitz

Appendix

- Student Enrollment and Fees
- Glossary of Budget Related Terms
- Organizational Charts by Division

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Student Fees
2009/10 to 2019/20

Fiscal Year	Tuition Fee							Non-Resident Tuition Per Unit	Campus Mandatory Fees							
	Undergraduate Tuition Fee		Graduate Students' Tuition Fee						(Academic Year fees that must be paid to apply to, enroll in, or attend SJSU)							
			Non-Teacher Credential		Teacher Credential Candidates		Education 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	Up to 6 Units	6.1 Units or Greater	Fall/Spring									
2019/20 <i>Change Over PY</i>	\$3,330 0.0%	\$5,742 0.0%	\$4,164 0.0%	\$7,176 0.0%	\$3,864 0.0%	\$6,660 0.0%	\$11,838 0.0%	\$396 0.0%	\$70	\$380	\$0	\$33	\$196	\$762	\$669	\$ 2,110 2.7%
2018/19 <i>Change Over PY</i>	\$3,330 0.0%	\$5,742 0.0%	\$4,164 0.0%	\$7,176 0.0%	\$3,864 0.0%	\$6,660 0.0%	\$11,838 0.0%	\$396 0.0%	\$68	\$364	\$0	\$32	\$192	\$744	\$654	\$ 2,054 3.8%
2017/18 <i>Change Over PY</i>	\$3,330 4.9%	\$5,742 4.9%	\$4,164 6.6%	\$7,176 6.5%	\$3,864 4.9%	\$6,660 4.9%	\$11,838 6.5%	\$396 6.5%	\$120	\$295	\$0	\$31	\$185	\$717	\$631	\$ 1,979 1.8%
2016/17 <i>Change Over PY</i>	\$3,174 0.0%	\$5,472 0.0%	\$3,906 0.0%	\$6,738 0.0%	\$3,684 0.0%	\$6,348 0.0%	\$11,118 n/a	\$372 0.0%	\$118	\$290	\$0	\$31	\$182	\$704	\$620	\$ 1,945 2.0%
2015/16 <i>Change Over PY</i>	\$3,174 0.0%	\$5,472 0.0%	\$3,906 0.0%	\$6,738 0.0%	\$3,684 0.0%	\$6,348 0.0%	\$11,118 n/a	\$372 0.0%	\$116	\$284	\$0	\$30	\$178	\$690	\$608	\$ 1,906 3.0%
2014/15 <i>Change Over PY</i>	\$3,174 0.0%	\$5,472 0.0%	\$3,906 0.0%	\$6,738 0.0%	\$3,684 0.0%	\$6,348 0.0%	\$11,118 n/a	\$372 0.0%	\$113	\$276	\$0	\$30	\$172	\$670	\$590	\$ 1,851 -1.1%
2013/14 <i>Change Over PY</i>	\$3,174 0.0%	\$5,472 0.0%	\$3,906 0.0%	\$6,738 0.0%	\$3,684 0.0%	\$6,348 0.0%		\$372 0.0%	\$111	\$272	\$0	\$30	\$169	\$659	\$630	\$ 1,871 12.9%
2012/13 <i>Change Over PY</i>	\$3,174 0.0%	\$5,472 0.0%	\$3,906 0.0%	\$6,738 0.0%	\$3,684 0.0%	\$6,348 0.0%		\$372 0.0%	\$109	\$253	\$0	\$30	\$147	\$648	\$470	\$ 1,657 21.1%
2011/12 <i>Change Over PY</i>	\$3,174 26.3%	\$5,472 26.2%	\$3,906 26.0%	\$6,738 26.1%	\$3,684 26.2%	\$6,348 26.2%		\$372 0.0%	\$106	\$219	\$234	\$30	\$147	\$632		\$ 1,368 20.0%
2010/11 <i>Change Over PY</i>	\$2,514 7.7%	\$4,335 7.7%	\$3,099 7.6%	\$5,343 7.7%	\$2,919 7.6%	\$5,031 7.6%		\$372 0.0%	\$86	\$187	\$198	\$30	\$147	\$492		\$ 1,140 10.9%
2009/10 <i>Change Over PY</i>	\$2,334 31.9%	\$4,026 32.1%	\$2,880 32.2%	\$4,962 32.1%	\$2,712 32.2%	\$4,674 32.0%		\$372 9.7%	\$66	\$155	\$198	\$30	\$147	\$432		\$ 1,028 8.9%

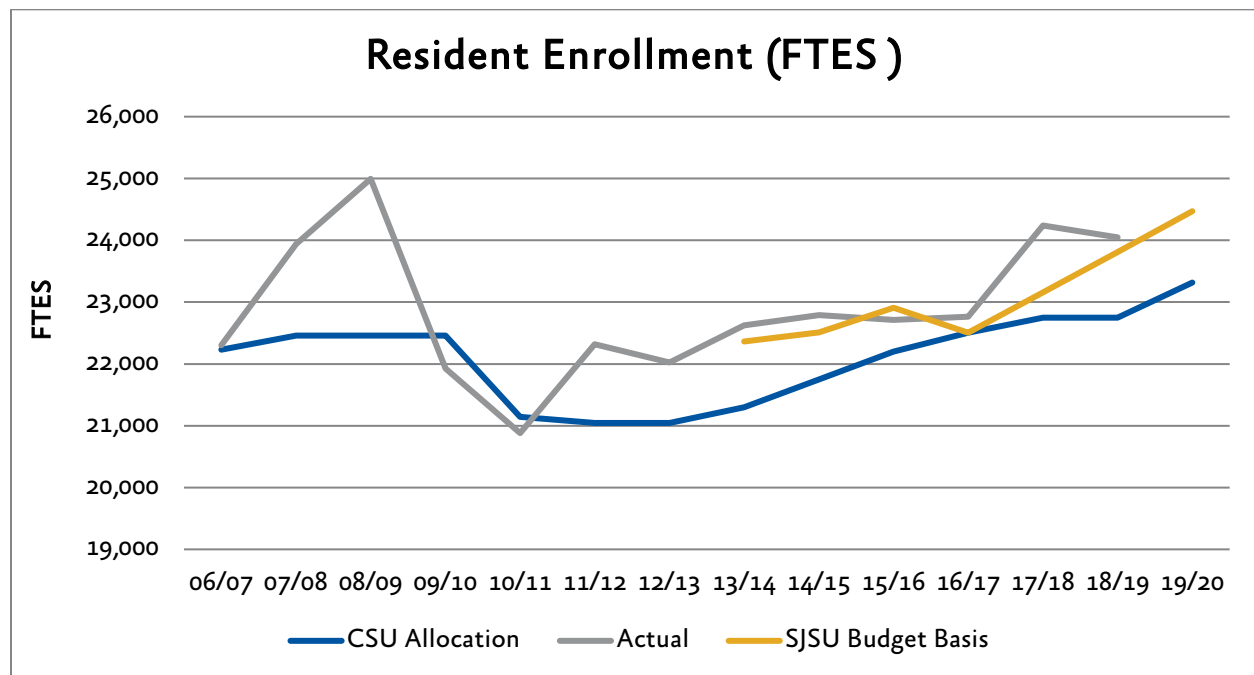
STUDENT ENROLLMENT

Student enrollment informs the CSU's budget allocations from the State and resource planning efforts. 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. Enrollment targets for each campus are jointly determined by the chancellor and campus presidents. Targets are referenced in terms of Full Time Equivalent Students (FTES) based on an Average Unit Load (AUL) of 15 units for undergraduate students.

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. SJSU has pursued a plan for flat student headcount, while allocating more resources for additional course sections and student services.

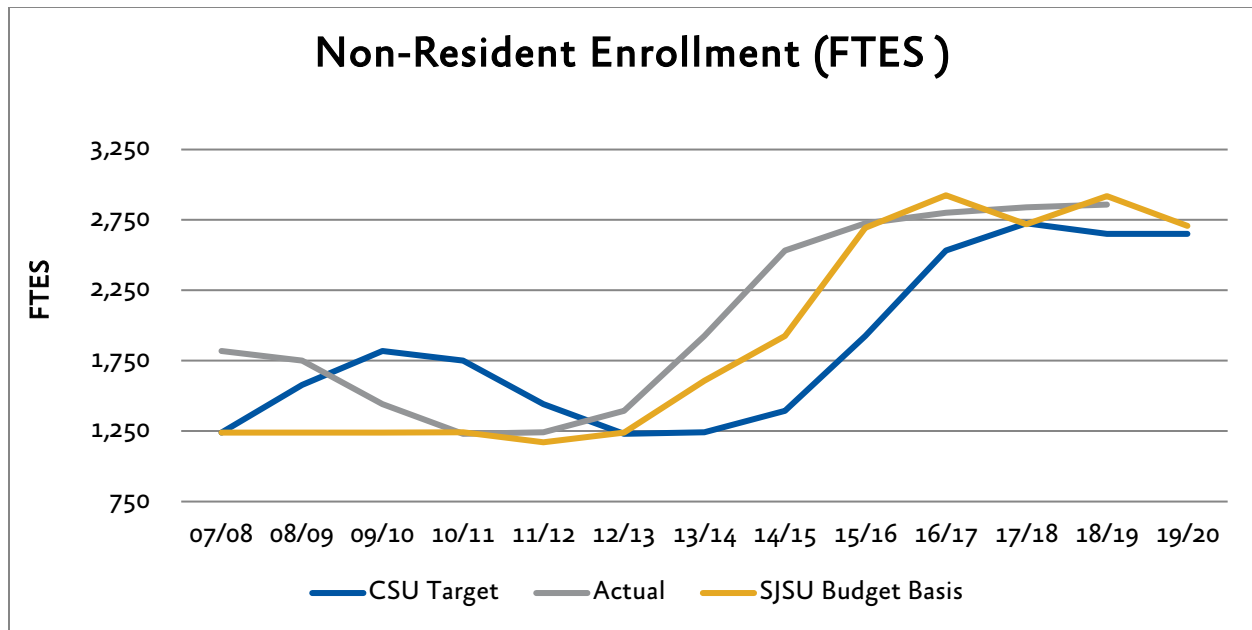
Resident Enrollment (State-Supported)

Resident student enrollment has fluctuated over the years at SJSU. SJSU's enrollment allocation ("target") was essentially flat between 2006/07 and 2009/10 at approximately 22,460 FTES. In response to deep budget reductions made too late in 2009/10 to implement, the CSU reduced enrollment targets in 2010/11 and 2011/12 to 21,045 FTES. Since then, SJSU's resident enrollment has consistently exceeded the target set by CSU, and the campus is classified as "impacted" in all undergraduate programs. In 2019/20, SJSU's resident FTES target increased by 569 FTES to a total of 23,316, which is a 2.5% increase over the 2018/19 target. Actual enrollment levels made increases in 2018/19 as a result of efforts to increase average unit loads in support of Graduation Initiative 2025.



Non-Resident Enrollment (Self-Supported)

While the CSU Support 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 targets within a reasonable range. Expanding non-resident enrollment is a priority for SJSU, and heightened recruitment efforts are evident in the results. Non-resident enrollment target for 2019/20 is conservatively planned at 2,707 FTES.



CSU Target and Actual FTES

	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20
<u>Target FTES</u>											
Resident	22,460	21,145	21,045	21,045	21,298	21,728	22,001	22,507	22,747	22,747	23,316
Non-Resident	1,239	1,239	1,171	1,239	1,607	1,927	2,400	2,650	2,650	2,650	2,650
Total Target FTES	23,699	22,384	22,216	22,284	22,905	22,905	24,601	25,157	25,547	25,397	25,966
<u>Actual FTES</u>											
Resident	24,991	21,927	20,881	22,318	22,023	22,788	22,710	22,766	24,237	24,050	
Non-Resident	1,751	1,441	1,231	1,241	1,395	2,532	2,727	2,801	2,839	2,859	
Total Actual FTES	26,742	23,368	22,112	23,559	23,418	25,320	25,437	25,567	27,076	26,909	

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GLOSSARY OF BUDGET/FINANCE 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 National Guard Education Assistance Award: 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 CPGE, University Housing, Intercollegiate Athletics, Lottery, Parking and Student Health Services.

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 Maintenance/Repair Project: Is a project that falls in one of two categories: 1) Recurring Maintenance/Repair, and 2) Non-Recurring Maintenance/Repair (NRM). Projects do not have a dollar limit and do not require Board of Trustees' approval unless debt financing is necessary.

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.

College of Professional and Global Education (CPGE, formerly CIES): Also known within the CSU as *Continuing Education*, offers both matriculated and non-matriculated courses through Special Session, Open University, Summer and Winter Intersessions, International Student and Scholar Services, and Professional Development.

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

Continuing Education: Refer to College of Professional & Global Education.

Deferred Maintenance: Funding allocated for specific campus projects that are designed to continue the useful lifespan of a facility. Examples include repainting an exterior of a facility, re-roofing, 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.

Ed.D Program – 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. For 2018/19, the Expected Family Contribution is \$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 \$5,486 for 2018/19, and is prorated according to the number of units enrolled. The maximum award is for 6 years (600%) or 12 semesters.

Federal Supplemental Educational Opportunity Grant (SEOG): A federal grant that provides assistance for undergraduates with the 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 Compact: An agreement made between the Governor and the CSU/UC regarding future funding increments. Originated in 1995 under Pete Wilson and used intermittently, typically in good budget years.

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 \$709,000. 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 (Ops) Fee, Student Association Fee, Student Union Fee, Document Fee, SSETF IRA Fee, SSETF Course Support Fee, and SSETF Student Success Fee.

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 \$171,000 for 2018/19. 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 \$709,000 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. Such work may include restoring facilities, buildings, equipment, roads, sidewalks, sewer and

water systems, utility infrastructure, and grounds to their original condition or to a condition where the intended use can be restored.

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 capital project that typically materializes each year as part of ongoing and routine operations and maintenance of buildings and equipment.

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.

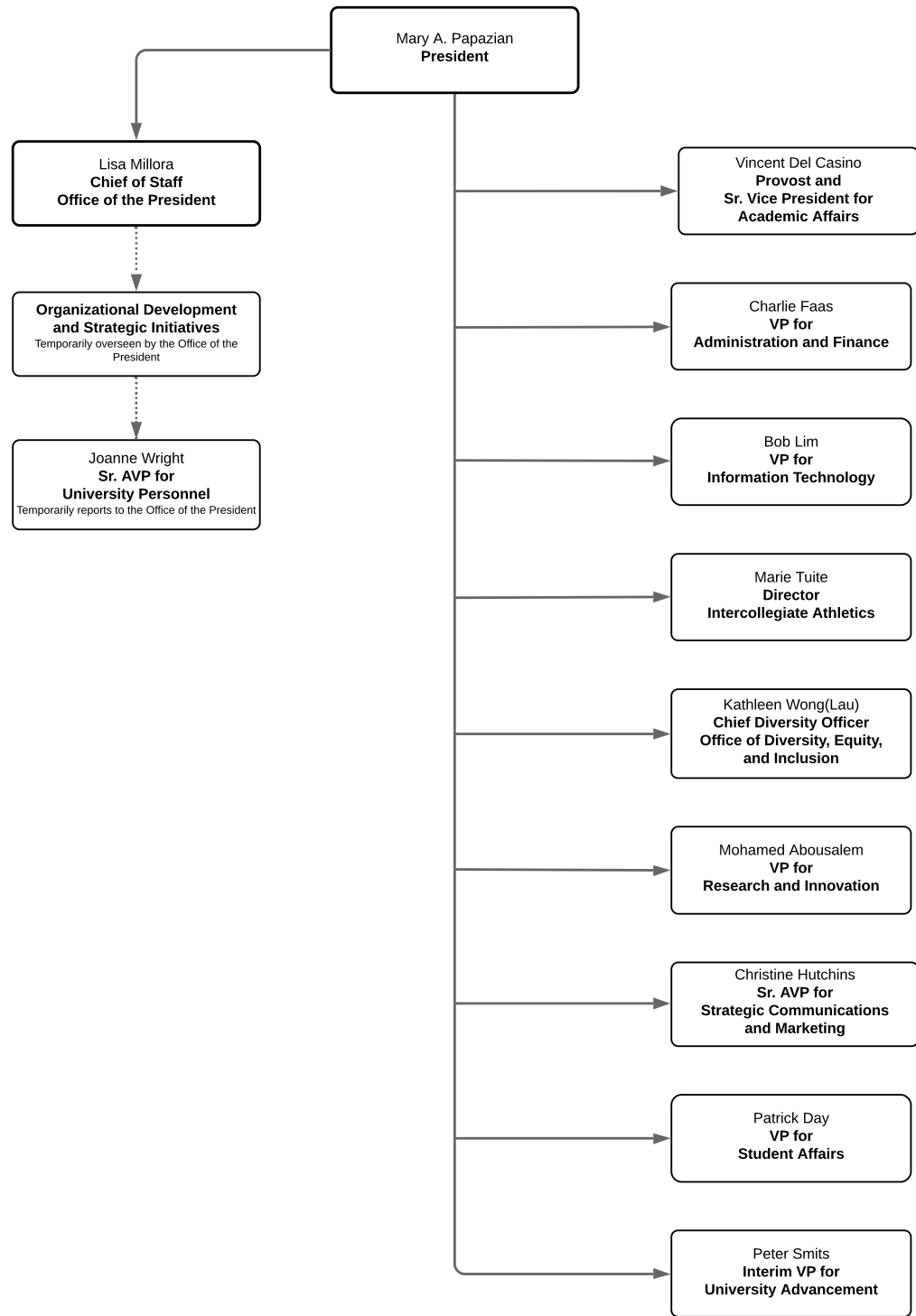
Support Budget: Operating Fund base budget plus any one-time funding for a given fiscal year.

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.

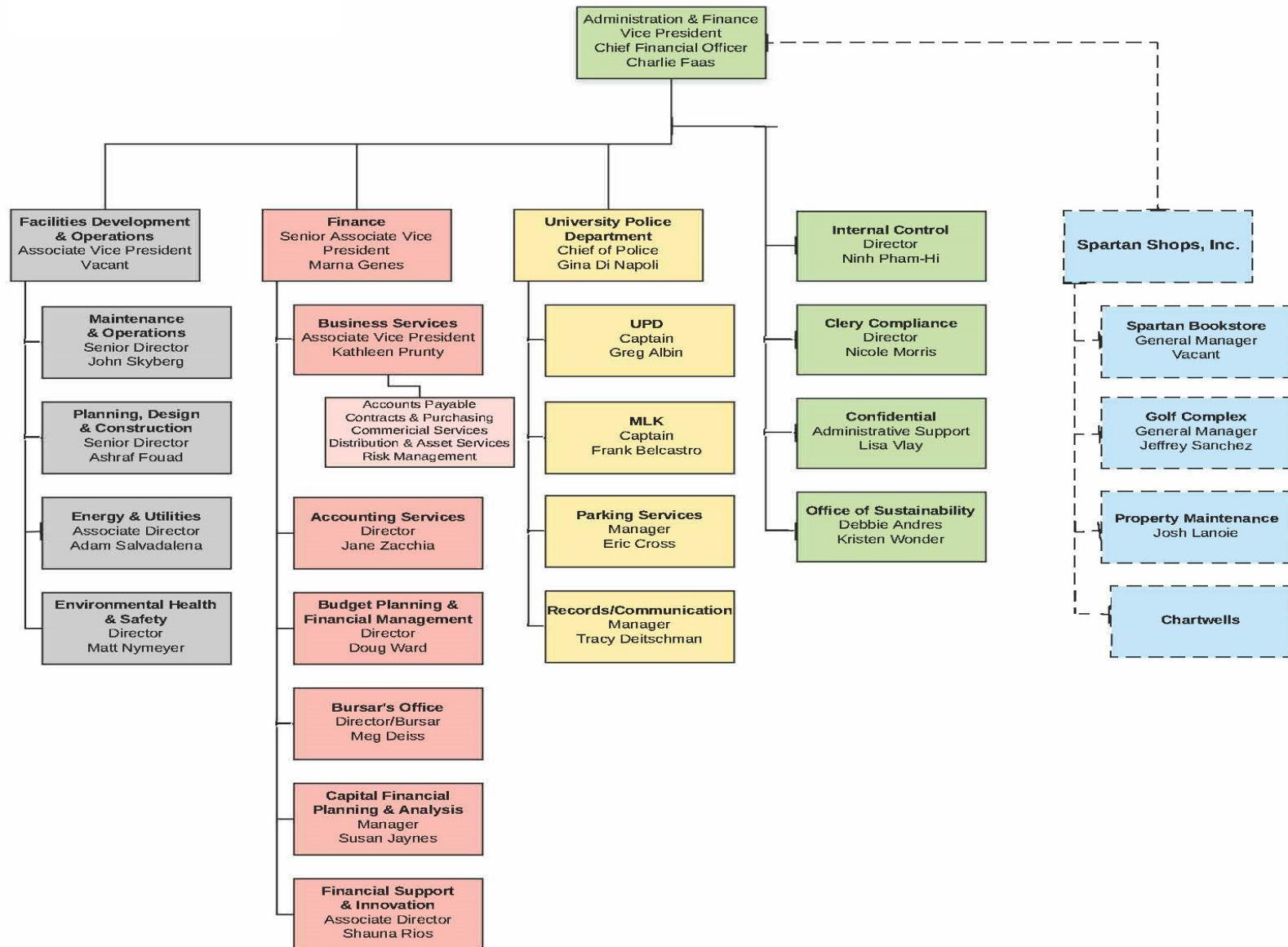
Tower Foundation: The Tower Foundation is SJSU's auxiliary organization dedicated solely to philanthropy. Its primary mission is to build bridges with alumni and friends by improving services, stewardship and donor support. The Foundation encourages private gifts, trusts, and bequests for the benefit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

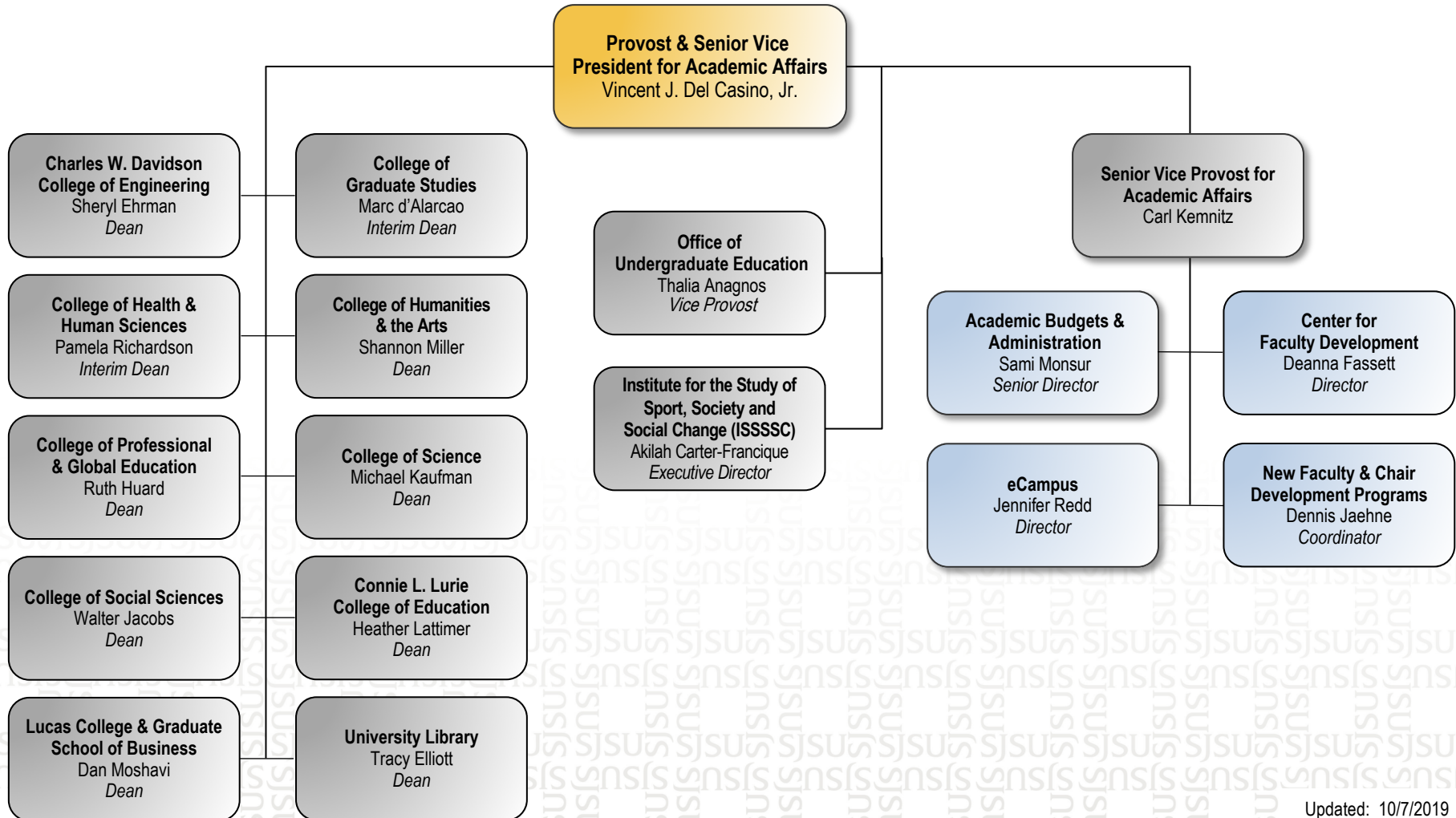
Tuition Fee: In November 2010, the Board of Trustees voted to rename the State University Fee (SUF) the Tuition Fee. All students, resident and non-resident, pay the Tuition Fee.

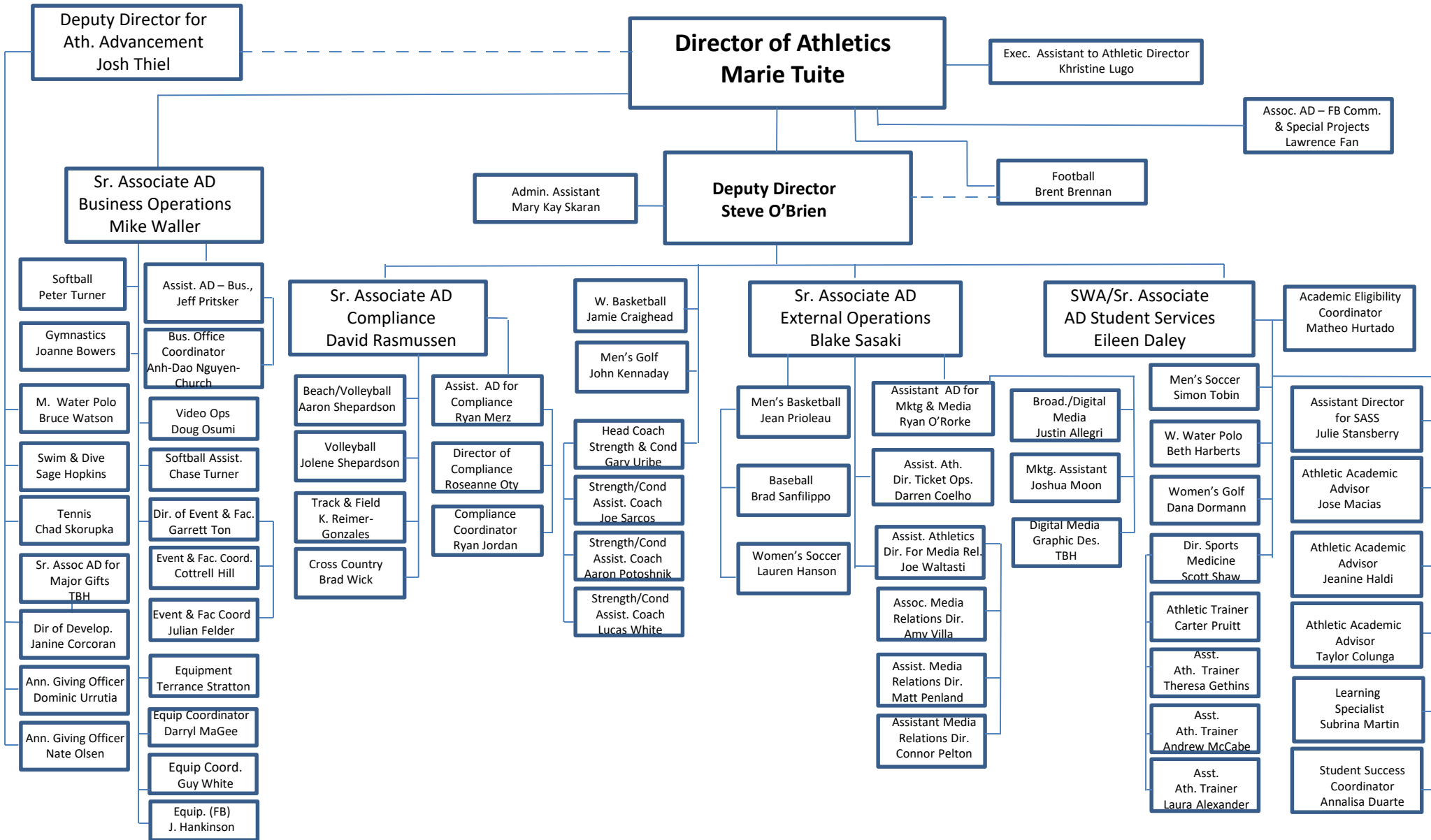
University Wide Resources: Resources essential to the operation of the campus and independent from any particular division's core activities. Examples include utilities, benefits and compensation pools, space rental and risk pool premiums.

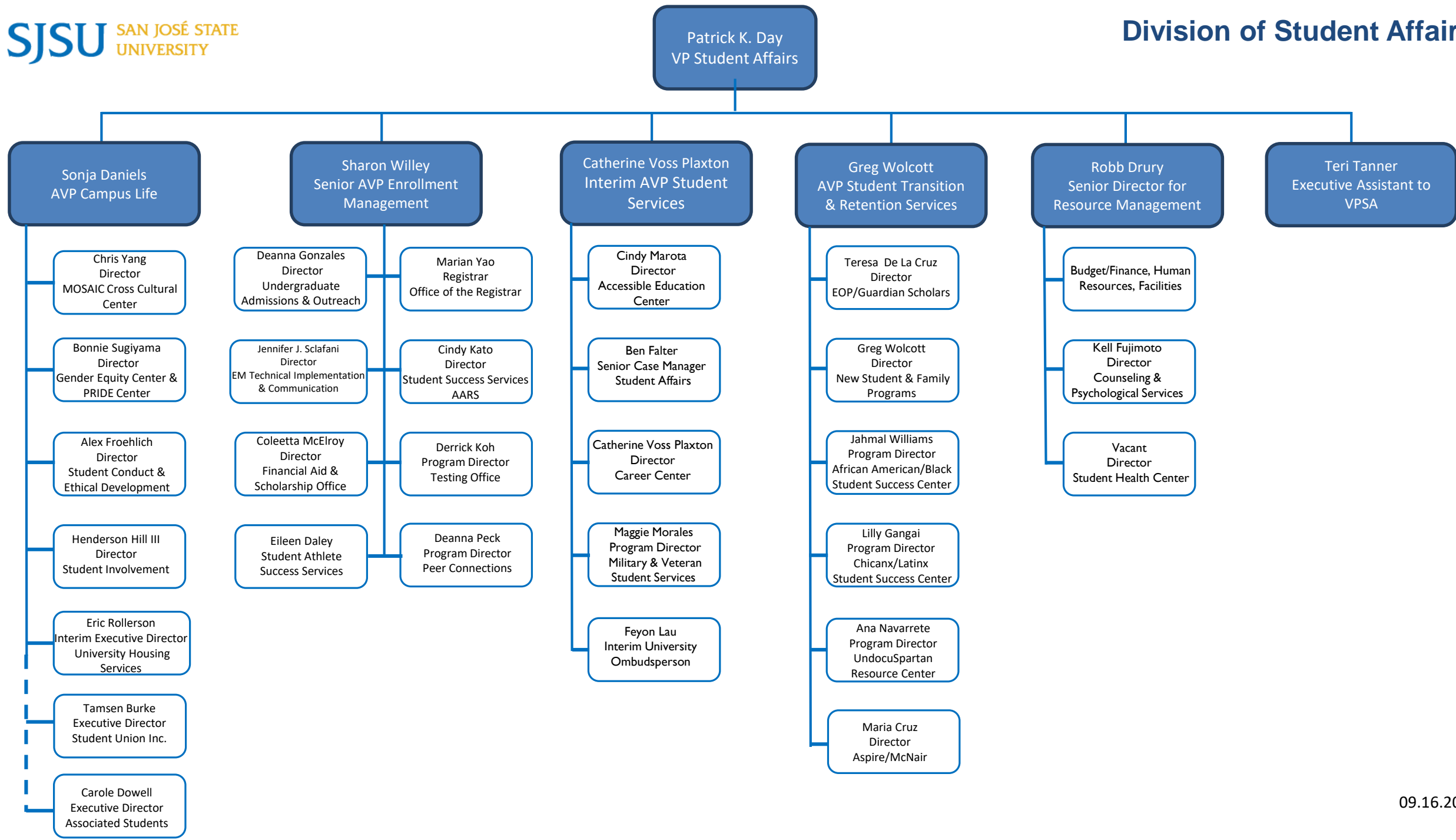


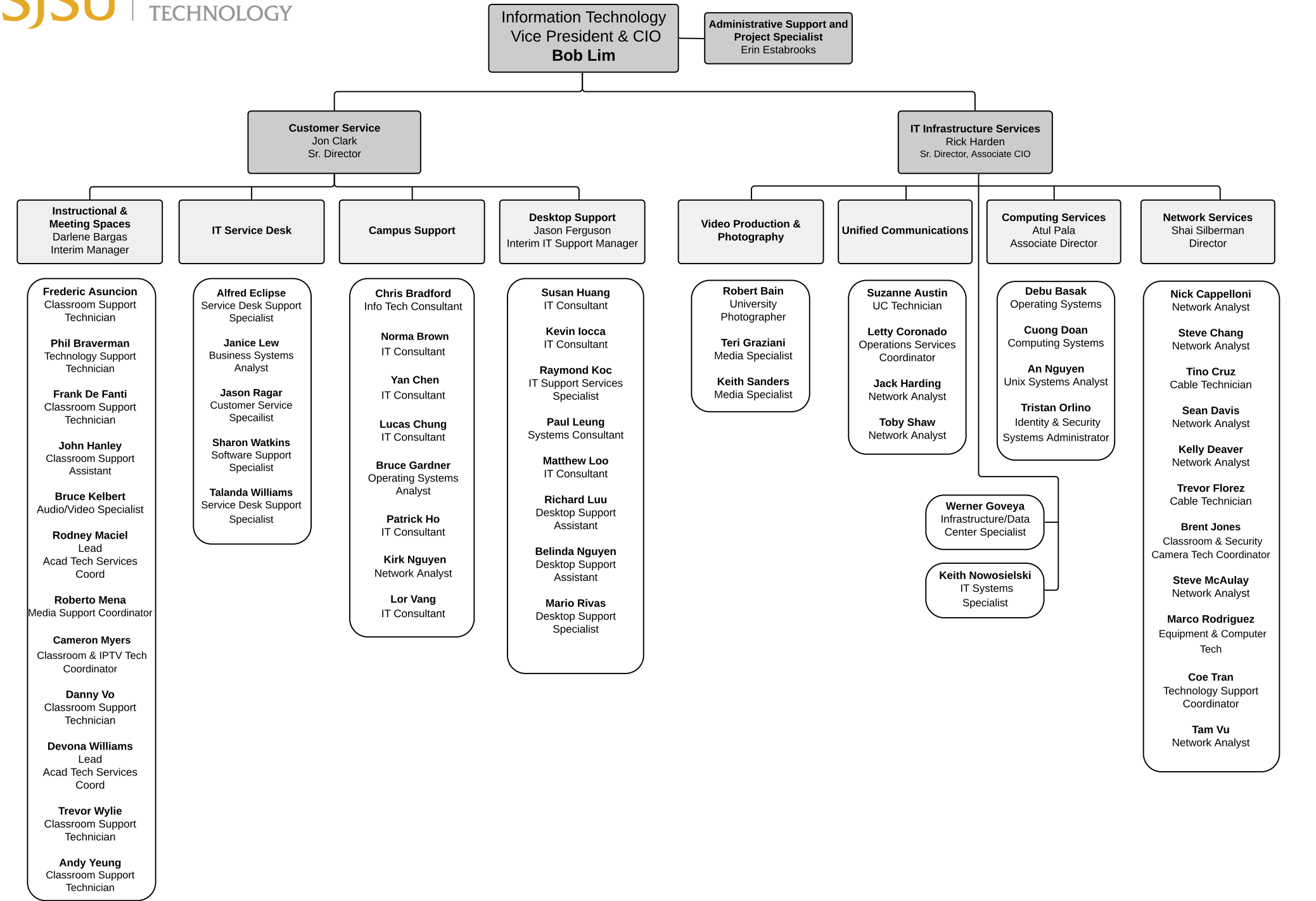
**ADMINISTRATION & FINANCE DIVISION
ORGANIZATIONAL CHART**

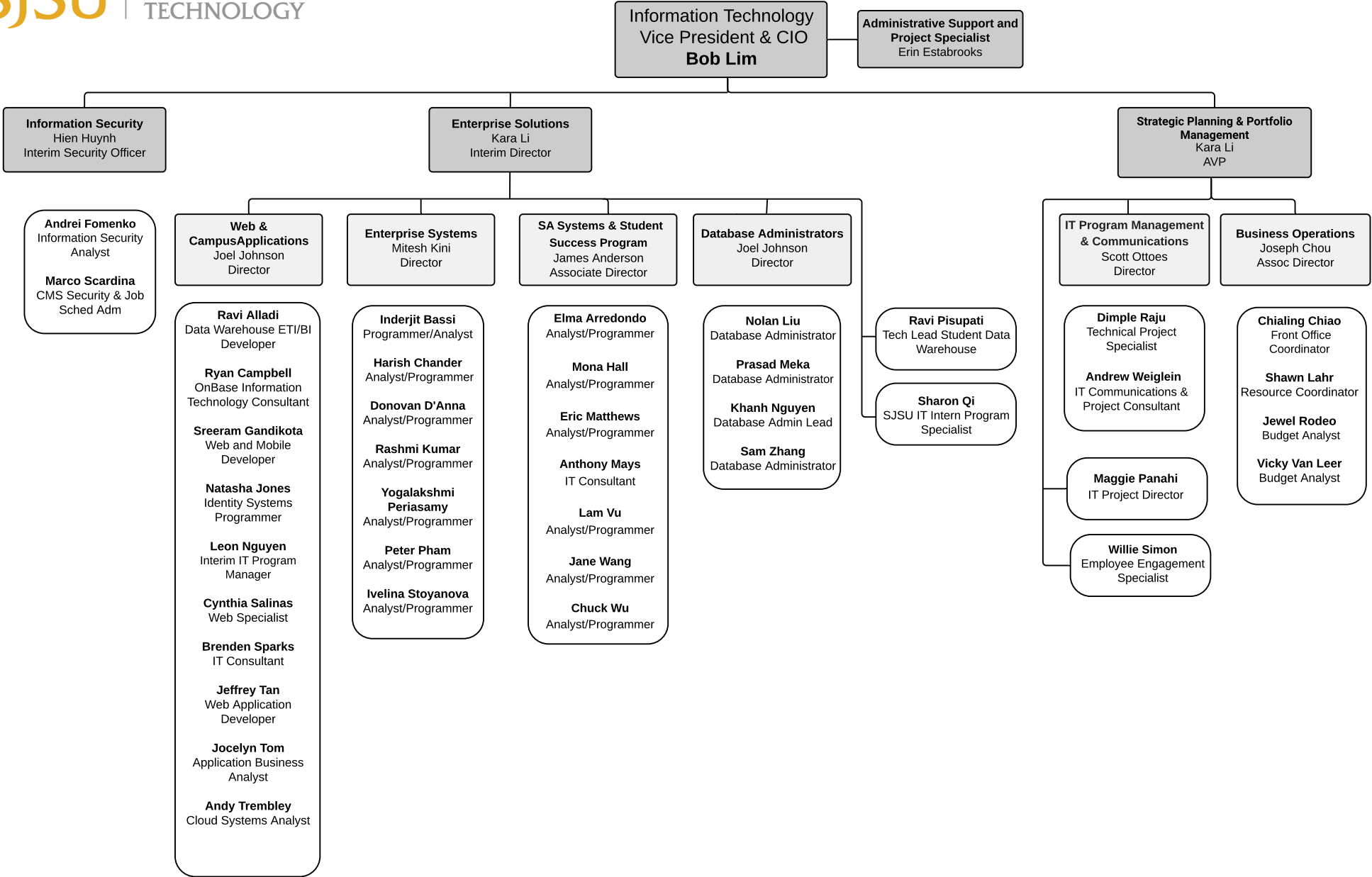




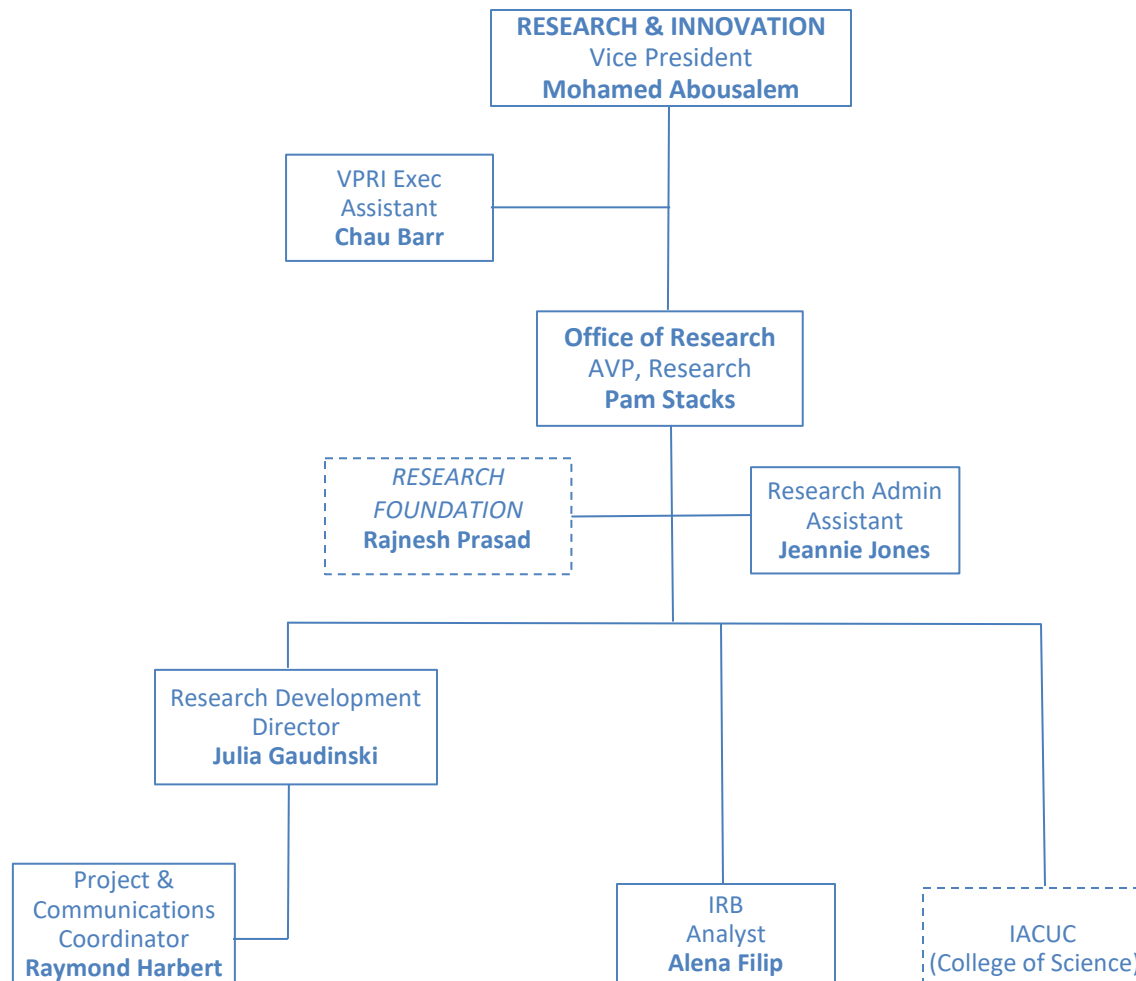








Research & Innovation Division



Peter Smits
Interim Vice President
CEO, Tower Foundation

Julie Jimenez
Director
Financial and
Administrative Services

Aracelis Velazquez Rivera
Administrative Assistant

Vacant
Executive Director
Board Development and
Donor Relations

Candice Piper
Executive Assistant to the VP

Brian Bates
Associate Vice President
Alumni Community and Engagement /
Executive Director of Alumni Association

Joshua Thiel
Deputy Athletics Director
Athletics Advancement

Sabra Diridon
Interim Associate Vice President
Development and
Executive Director of the Campaign

Christine Hutchins
Senior Associate Vice President
Strategic Communications and
Marketing

Beth Colbert
Associate Vice President
Advancement and Campaign Operations

Leslie Rohn
Chief Operating Officer
Tower Foundation

Amber Armstrong
Director
Special Events

Clifton Gold
Assistant Creative
Director for Live Events /
Senior Event Planner

Erika Greet
Assistant Director
Ceremonies and Events

Nicholas Messing
Event Planner

Lauren Avina
Event Planner

Vacant
Event Planner

Vacant
Event Planner
Athletics Advancement

Jen Jurgensen
Budget and Program
Analyst

Mary Growitz
Administrative
Coordinator

Vacant
Membership Services
Assistant

Eric Bonesteel
Associate Director for
Silicon Valley Outreach

Valerie Gonzales
Assistant Director
Alumni Relations

Vacant
Student and Community
Outreach Officer

Braley Ferris
Associate Director
Marketing and
Membership

Vacant
Associate Director
Alumni Career Resources

Vacant
Strategic Community
Engagement Manager

Nancy Stewart
Senior Director
Annual Giving

Carolyn Canete
Annual Giving Manager

Evan Smallwood
Director Leadership
Annual Giving

Robert Zipp
Leadership Annual
Giving Officer

Jason Brown
Annual Giving Officer

Student Call Center

Hilary Gunderson
Director
Constituent Engagement

Vacant
Senior Associate
Athletics Director
Major Gifts

Nathan Olson
Athletics Annual
Giving Officer

Janine Corcoran
Director of Development
Intercollegiate Athletics

Dominic Urrutia
Athletics Annual
Giving Officer

Claudia Tercero
Administrative Assistant
to the AVP

Rodney Knox
Executive Director of
Development

Randy Balogh
Director
Planned Giving

Anie Clark
Planned Giving
Coordinator

Vacant
Executive Director
Corporate and
Foundation Relations

Michelle Smith
Corporate and
Foundation Relations
Officer

Vacant
Director of
Foundation Relations

Brad Vartan
Senior Director of
Development
College of Business

Sabra Diridon
Senior Director of
Development
Campaign Priorities

Vacant
Director of Development
College of Education

Sela Gaglia
Director of Development
College of Engineering

Sonia Wright
Sr Director of
Development
College of Health and
Human Sciences

Matthew Taylor Siegel
Director of Development
Humanities and
the Arts

Anh Ly
Director of Development
Martin Luther King Jr.
Library

Michael Donohue
Director of Development
Moss Landing

Emily Lane
Director of Development
College of Science

Daan Giron
Director of Development
College of
Social Sciences

Jody Ulate
Senior Director of
Strategic
Communications and
Chief Storyteller

Julia Halprin Jackson
Advancement Writer

Michelle Frey
Creative Director

Peter Carvalho
Sr Graphic Designer and
Art Director

Vacant
Graphic Designer

Roman Goshev
Production Manager

Vacant
Digital Director

Kelly Preston
Digital Communications
Specialist

Monica Bosque Mendoza
University Web and User
Experience Designer

Felicia McKee
Administrative Assistant to
the AVP

Michael Janes
Director Executive
Communications

Melissa Anderson
Executive
Communications
Specialist

Vacant
Senior Director
Media Relations

Robin McElhatton
Media Relations
Specialist

Amanda Struer
Director
Development
Research

Elina Barahona
Advancement
Research Coordinator

Kathy Richmond
Development
Research Analyst

Veronica Murphy
Director,
Donor Relations and
Stewardship

Rigo Vargas
Computer Systems
Consultant

Leonor Cheong
Database Administrator

Libing Sun
Programmer Analyst

Pat Thompson
Administrative Assistant
to the AVP

Maria Ramirez
Director
Advancement
Services

Shawna Terry
Gift Analyst

Roya Omid
Gift Analyst

Vanessa Cruz
Gift Analyst

Vacant
Gift Analyst

Christina Tan-Aoyagi
Controller

Cindy Nimrud
Accounting Supervisor

Lena Tran
Accountant and
Procurement Card
Coordinator

Jennifer Stevenson
Accounting Associate

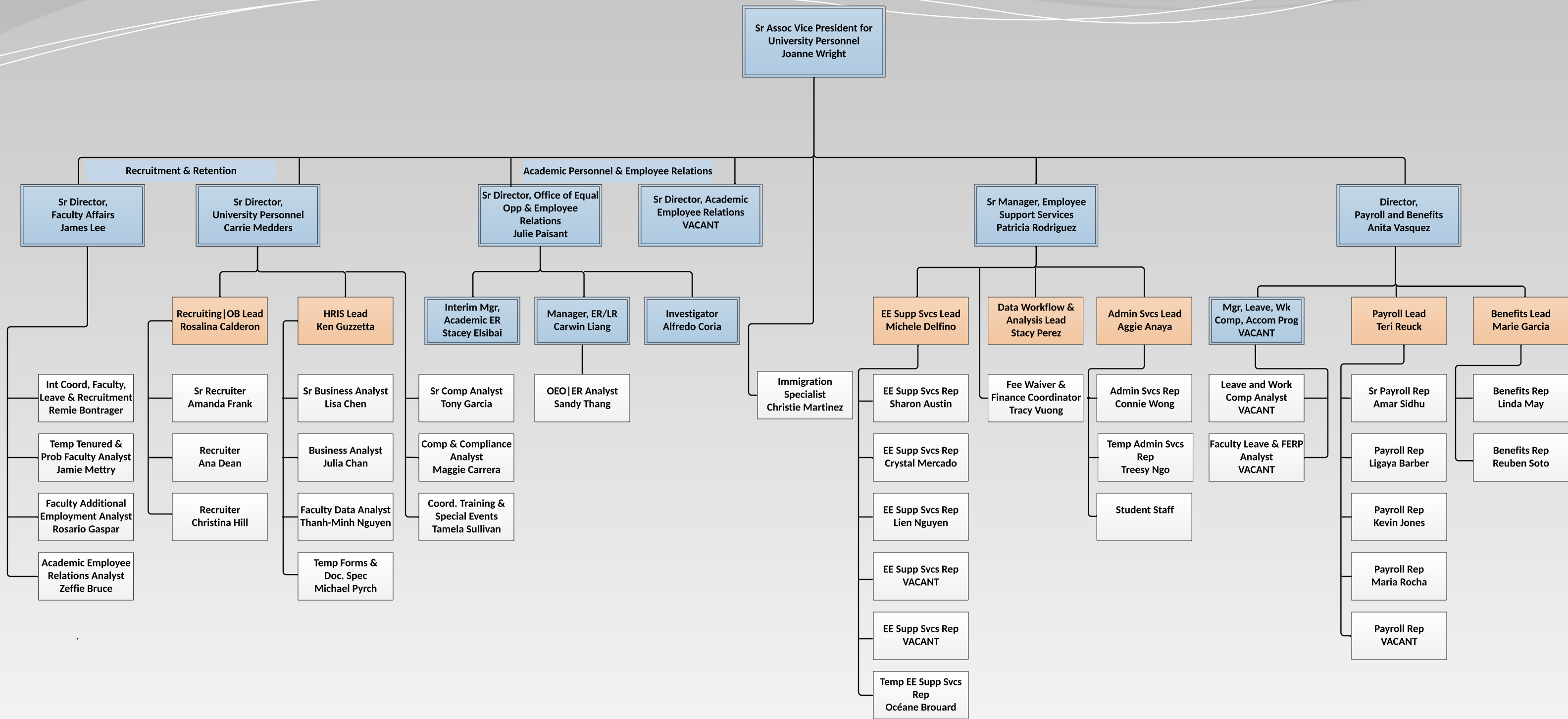
Vi Tran
General Accounting
Associate

Brooklyn Boyd
Assistant to the COO

Leah Barrington
Director
Tower Foundation
Human Resources

Evelyn Johnsen
Grants Manager

Csilla Kuehn
Senior Endowment
Accountant



*University Personnel temporarily reports to the Office of the President during the 19-20 FY.