



CSUE | Academic Resources
ACADEMIC AFFAIRS

Academic Budget Council

March 2024 Meeting

March 7, 2024 –CP 1060-05 & Zoom





**Welcome new
members!**



Agenda

- Meeting Reminders
- Organization Updates
- Process Improvement
- Learning Opportunities
- Budget/Fiscal Updates
- Good News and Announcements
- Wrap-Up and Adjournment

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Meeting Reminders



Meeting Reminders...

- The purpose of monthly ABC meetings is to:
 - Build community across colleges and departments
 - Create space for budget/administrative analysts to share with and learn from one another
 - Create space for budget/administrative analysts to voice common issues/challenges and together develop potential solutions
 - Share CSU, campus, and divisional policy, procedural, and staffing updates
- You are encouraged to share ways you/your unit have achieved efficiencies, your tips and tricks, and other nuggets of wisdom.
- Please share information from this meeting within your college/dept and across teams.
- Who's not here that should be? Share their name and college/dept with Bonnie at blivictorino@Fullerton.edu.

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Organization Updates



Office of the Provost and Vice President for Academic Affairs

OFFICE OF THE PROVOST AND VICE PRESIDENT FOR ACADEMIC AFFAIRS

COLLEGES & LIBRARY

ACADEMIC AFFAIRS UNITS

INITIATIVES

ACADEMIC SENATE

NEWS

CAMPUS CALENDAR

New
Look!

Office of the Provost and Vice President for Academic Affairs

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Process Improvement



Process Improvement

External Processes Managed by Campus Partners

- Concur
 - Concur system is still under review by Admin and Finance
 - Feedback on current updates & changes – February 27, 2024
 - Concur reports – Are these being filtered and shared with your Colleges/Dept. Chairs/Managers?
 - Concur Faculty Resources:
<https://adminfin.fullerton.edu/travel/resources/Faculty.php>
- Hospitality Policy – With Auditor for Final Review

Process Improvement

Internal Processes Managed by Academic Affairs

- Forms requiring VPAA review and approval
 - Alicia to lead the review of campus forms; recommend changes to the workflow
 - Kick-Off Meeting TBD-Week of March 11-15
 - Alicia, Lan, Yari, Ivan, Deborah, Crystal, and Mandy
- Access to resources, visibility of budget information and data
 - Academic Resources website development
 - What information would you like to see on the website?
- Are there other processes that need to be revamped or newly created?

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Learning Opportunities



Learning Opportunities

Led by Academic Affairs

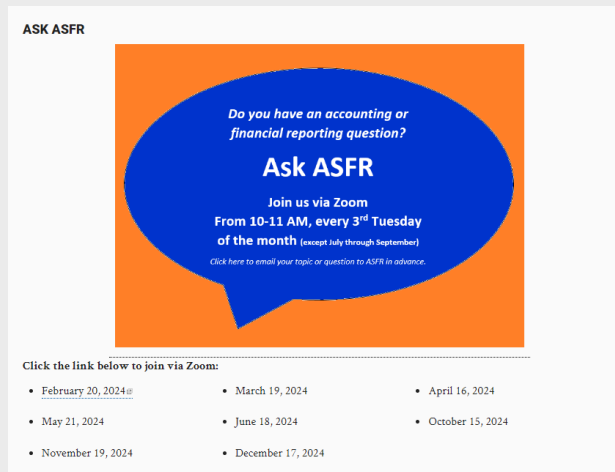
- Monthly brown bag sessions with VPAA Academic Resources
 - Sessions will continue as long as there's interest
 - Topics for April? Share with Bonnie at blivictorino@fullerton.edu
- ABC Meetings with VPAA Academic Resources
 - Will be moved to a Bi-Monthly or Quarterly
- Quarterly meetings with campus partners
 - Initially planned due to lack of training and communication
 - Since improvements have been made, the new plan is to hold these meetings 1x per semester

Learning Opportunities

Led by Admin and Finance

- Ask ASFR monthly Zoom Sessions:

<https://financialservices.fullerton.edu/controller/asfr/services/Workshops.php>



- **SAVE THE DATE:** Year-End Closing Process for Financial Services, Budget and Payroll Services (Year End Closing Memo will be announced soon with Zoom Link)
 - March 19, 2024 – 1:30 PM to 3:30 PM (Virtual Presentation)

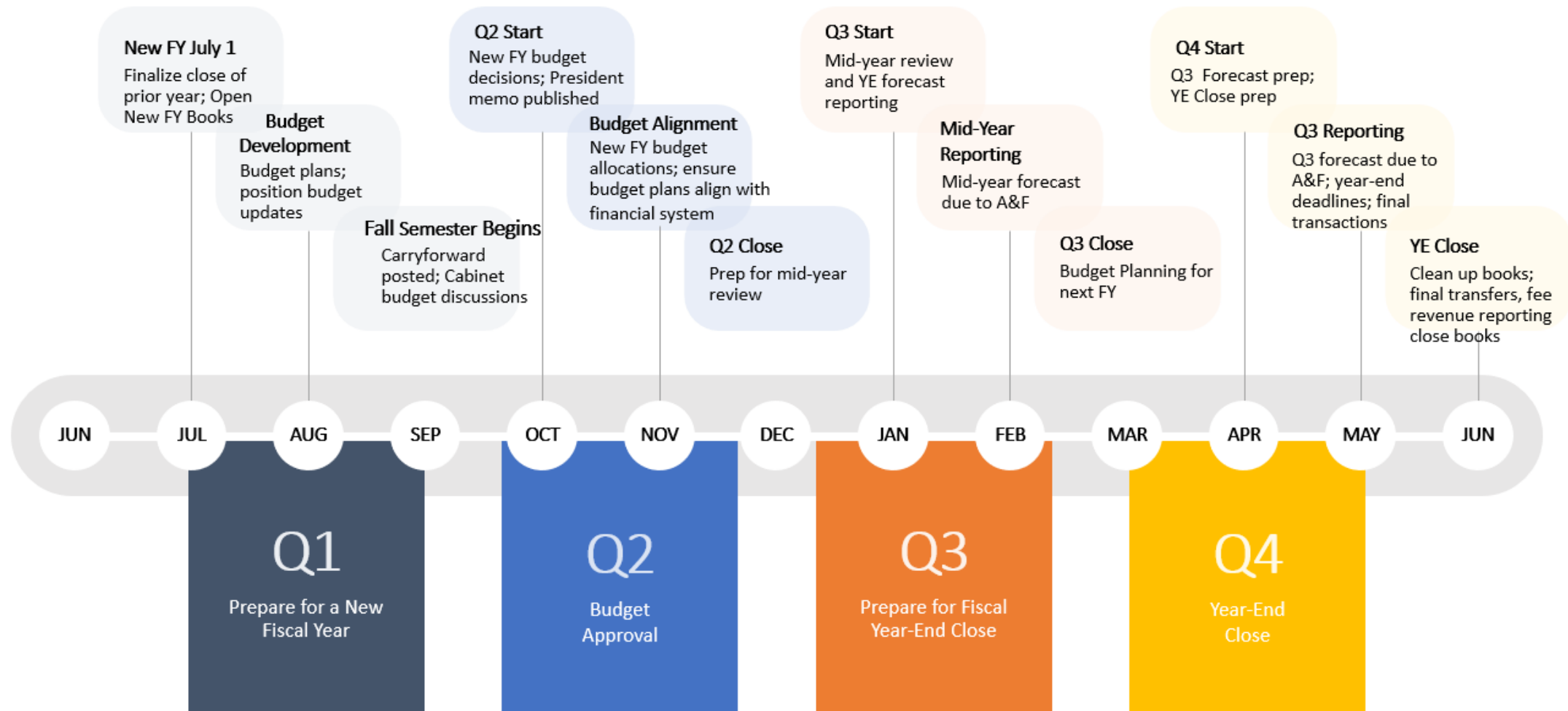
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Budget/Fiscal Updates



Budget Cycle

Fiscal Year July 1st – June 30th



Mid-Year Review and Upcoming Reporting

- VPAA has completed the mid-year review and forecast with input from colleges and AVP units. Thank you all for your assistance.
- Up-Coming:
 - **April-May:** Colleges/AVP units complete Q3 with carryforward plans and Position Budgeting
 - **Apr-June:** FY 24-25 Budget Development
 - **July:** Annual Fee Revenue Reports
 - **August:** Carryforward Reporting

Budget/Fiscal Updates – Position Budgeting

- What is Position Budgeting?
 - Accounting of all positions in the division
 - Ensure permanent positions are baselined
 - Identify alternate source of funds for non-baselined employees
- When?
 - Position budgeting process will begin once salary increases/expenses post (Mar-Apr)
 - Line by line entries to increase the budget for each position in accordance with the increase
 - Reporting process/template simplified

Budget/Fiscal Updates – Pending Allocations

- Pending allocations managed by VPAA
 - Exceptional levels of service to students & other commitments – by end of week (please reach out if Amir has made a commitment we need to follow up on)
 - Over-enrollment – Mar-Apr 2024
 - EIP cost recovery for term MOUs (Summer, Winter, OU) – Apr-May 2024
 - EIP program MOU allocations (allocations pending)
- New faculty onboarding
 - Colleges record expenses to the appropriate department budget in the college
 - Expenses, up to the approved amount, transferred out to Univ-wide by June 30
 - Effective this year (starting with faculty starting 24-25), funds must be spent down in 2 years
 - Process guide to be developed and shared in Mar-Apr timeframe

Budget/Fiscal Updates – Fee Revenue

- Consolidated Course Fee (CCF) – THEFD 20364
- Instructionally Related Activity (IRA) – TA002
- Student Success Initiative Fee (SSI) - SSFGF
 - **IMPORTANT TO NOTE:** Expenses must be shifted from THEFD to SSFGF by June 30. Otherwise, you will lose the funding.
 - **REMINDER:** You don't have to wait for SSFGF funds to post to the department's budget; expenses can be shifted in advance of the budget allocation. Use the projection we provide and shift expenses in advance.



FEE REVENUE MUST
BE FULLY EXPENDED
BEFORE YEAR-END.

YEAR-END BALANCES
ARE PULLED CENTRAL
TO VPAA.

Budget/Fiscal Updates – Fiscal Services Contacts DL Lists

Help our
Campus
Partners serve
you better!

Use these DLs
instead of
emailing
individuals.

Please share
with your teams!



Financial Services (DL) Department ListServ

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Please direct your inquiries to the appropriate DL-ListServ

Accounts Payable: DL-ap@fullerton.edu

Accounting Services & Financial Reporting: DL-accounting@fullerton.edu

Budget: DL-budget@fullerton.edu

Contracts & Procurement: DL-C_and_P@fullerton.edu

e-Business: ebusiness@fullerton.edu

Student Business Services: DL-SBS-Staff@fullerton.edu

Travel: DL-travel@fullerton.edu

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Good News & Announcements



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Wrap-Up & Adjournment

