



MEMORANDUM

6/24/2022

TO: Jeffrey D. Armstrong, President

FROM: Tess Loarie, Co-chair 
Cal Poly Opportunity Fee Committee

Cynthia Vizcaíno Villa, Co-chair 
Cal Poly Opportunity Fee Committee

COPIES: Cal Poly Opportunity Fee Committee
David Valadez

SUBJECT: 2021-22 Cal Poly Opportunity Fee Committee (CPOF) – Annual Report

During FY2021-2022, the Cal Poly Opportunity Fee Committee (CPOF) held four meetings on the following dates:

- January 18, 2022
- April 22, 2022
- April 29, 2022
- May 27, 2022

At the above-referenced meetings, discussions included:

- Committee Purpose and Role
- Executive Order 1117
- Committee Composition
- Fee Analysis and Projections
- Cal Poly Scholars Budget Proposal
- Budget Growth
- Funding Requests
- Voting

The Cal Poly Opportunity Fee Committee recommended approval of the attached 2022-2023 allocations:



**CPOF Summary
FY2019/20 - FY2022/23**

| | FY 2019/20 | FY 2020/21 | FY 2021/22 | FY 2022/23 | | |
|-------------------------------------------------------|---------------------|---------------------|----------------------|----------------------|--------------|---------------------|
| | Budget | Budget | Budget | Total Proposed | % of Funding | Net Change |
| Budget/Revenue | | | | | | |
| CPOF Revenues | 2,114,000 | 6,425,000 | 11,348,000 | 17,729,000 | | 6,381,000 |
| Total Recurring Funding | \$ 2,114,000 | \$ 6,425,000 | \$ 11,348,000 | \$ 17,729,000 | | \$ 6,381,000 |
| Expenses | | | | | | |
| <i>Direct Student Support & Advising</i> | | | | | | |
| Salary/Benefits | 958,990 | 1,681,966 | 1,872,103 | 2,894,601 | | 1,022,498 |
| Student Salaries | 138,375 | 197,557 | 236,500 | 362,100 | | 125,600 |
| Operating Expenses | 119,420 | 117,714 | 878,000 | 1,175,549 | | 297,549 |
| Subtotal Direct Student Support & Advising | 1,216,785 | 1,997,237 | 2,986,603 | 4,432,250 | 25% | 1,445,647 |
| Unallocated/Available Base | (201,207) | 58,992 | (149,603) | - | | 149,603 |
| Subtotal Unallocated/Available Base | (201,207) | 58,992 | (149,603) | - | 0% | 149,603 |
| Total Direct Student Support & Advising | \$ 1,015,579 | \$ 2,056,229 | \$ 2,837,000 | \$ 4,432,250 | 25% | \$ 1,595,250 |
| <i>Financial Aid</i> | | | | | | |
| Technology/WOW/SOAR Supplement | 270,000 | 352,800 | 990,900 | 838,800 | | (152,100) |
| Financial Aid | 529,434 | 2,673,983 | 4,683,100 | 8,025,700 | | 3,342,600 |
| Total Financial Aid | \$ 799,434 | \$ 3,026,783 | \$ 5,674,000 | \$ 8,864,500 | 50% | \$ 3,190,500 |
| <i>Faculty</i> | | | | | | |
| Salary/Benefits | 298,988 | 1,341,988 | 2,837,000 | 4,432,250 | | 1,595,250 |
| Operating Expenses | - | - | - | - | | - |
| Total Faculty | \$ 298,988 | \$ 1,341,988 | \$ 2,837,000 | \$ 4,432,250 | 25% | \$ 1,595,250 |
| Total Expenditures | \$ 2,114,000 | \$ 6,425,000 | \$ 11,348,000 | \$ 17,729,000 | 100% | \$ 6,381,000 |
| CO Assessment | \$ - | \$ - | \$ 567,400 | \$ 1,772,900 | | \$ 1,205,500 |