
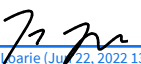



**MEMORANDUM**

---

**TO:** Jeffrey D. Armstrong, President   
Jessica Darin (Jun 23, 2022 12:31 PDT)

**FROM:** Tess Loarie, Co-chair   
Cal Poly Opportunity Fee Committee  
Tess Loarie (Jun 22, 2022 13:40 MDT)

Cynthia Vizcaíno Villa, Co-chair   
Cal Poly Opportunity Fee Committee  
Cynthia Vizcaino Villa (Jun 22, 2022 14:16 PDT)

**SUBJECT:** Cal Poly Opportunity Fee – 2022/23 Recommended Allocations

**DATE:** June 3, 2022

**CC:** Cal Poly Opportunity Fee Committee  
David Valadez

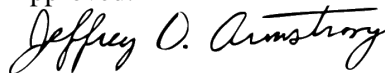
---

The Cal Poly Opportunity Fee Committee (the Committee) met in May to discuss recommendations from Provost Jackson-Elmoore and the Cal Poly Scholars Program regarding the FY2022-23 CPOF budget and expenditure plan. The Committee was provided an overview of proposed expenses totaling approximately \$1,595,250.

For your consideration, the Committee approved by unanimous vote the attached recommendations.

Please let us know if you have any questions, or if we can provide any additional information regarding these committee recommendations.

Approved:



Jeffrey D. Armstrong  
President



**CAL POLY**

**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
<b><u>Budget/Revenue</u></b>						
CPOF Revenues	2,114,000	6,425,000	11,348,000	17,729,000		6,381,000
<b>Total Recurring Funding</b>	<b>\$ 2,114,000</b>	<b>\$ 6,425,000</b>	<b>\$ 11,348,000</b>	<b>\$ 17,729,000</b>		<b>\$ 6,381,000</b>
<b><u>Expenses</u></b>						
<i>Direct Student Support &amp; 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
<b>Subtotal Direct Student Support &amp; Advising</b>	<b>1,216,785</b>	<b>1,997,237</b>	<b>2,986,603</b>	<b>4,432,250</b>	<b>25%</b>	<b>1,445,647</b>
Unallocated/Available Base	(201,207)	58,992	(149,603)	-		149,603
<b>Subtotal Unallocated/Available Base</b>	<b>(201,207)</b>	<b>58,992</b>	<b>(149,603)</b>	<b>-</b>	<b>0%</b>	<b>149,603</b>
<b>Total Direct Student Support &amp; Advising</b>	<b>\$ 1,015,579</b>	<b>\$ 2,056,229</b>	<b>\$ 2,837,000</b>	<b>\$ 4,432,250</b>	<b>25%</b>	<b>\$ 1,595,250</b>
<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
<b>Total Financial Aid</b>	<b>\$ 799,434</b>	<b>\$ 3,026,783</b>	<b>\$ 5,674,000</b>	<b>\$ 8,864,500</b>	<b>50%</b>	<b>\$ 3,190,500</b>
<i>Faculty</i>						
Salary/Benefits	298,988	1,341,988	2,837,000	4,432,250		1,595,250
Operating Expenses	-	-	-	-		-
<b>Total Faculty</b>	<b>\$ 298,988</b>	<b>\$ 1,341,988</b>	<b>\$ 2,837,000</b>	<b>\$ 4,432,250</b>	<b>25%</b>	<b>\$ 1,595,250</b>
<b>Total Expenditures</b>	<b>\$ 2,114,000</b>	<b>\$ 6,425,000</b>	<b>\$ 11,348,000</b>	<b>\$ 17,729,000</b>	<b>100%</b>	<b>\$ 6,381,000</b>
<b>CO Assessment</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 567,400</b>	<b>\$ 1,772,900</b>		<b>\$ 1,205,500</b>



# CAL POLY

## CPOF Direct Student Support & Advising Summary FY2022/23

	Approved FY 2021-22	New Proposals/ Adjustments	Proposed FY 2022-23
<b>Program Administration</b>			
<i>Salaries:</i>			
Associate Vice Provost (new)	-	165,000	165,000
Associate Director	68,292	-	68,292
Data & Budget Analyst	56,664	(20)	56,644
Admin. Support Coordinator	-	48,000	48,000
Salary reserves for IRP & GSI	-	39,410	39,410
<i>Benefits</i>	67,145	141,170	208,315
<i>Other Expenses</i>	122,000	61,040	183,040
<b>Total</b>	<b>\$ 314,101</b>	<b>\$ 454,600</b>	<b>\$ 768,701</b>
<b>Programs &amp; Support</b>			
<i>Salaries:</i>			
Program Coordinator, Yrs. 1-2 SSP II	51,648	3,564	55,212
Program Coordinator, Yrs. 3-4 SSP II	51,648	1,188	52,836
Program Coordinator, Mentors SSP III (new)	-	75,060	75,060
Univ 100 Coordinator	-	8,928	8,928
Univ 100 Lecturers - Student Affairs (20)	25,000	(1,219)	23,781
Univ 100 Lecturers - Faculty (10)	25,000	(3,000)	22,000
Salary reserves for IRP & GSI	-	5,445	5,445
<i>Student Salaries</i>	236,500	89,600	326,100
<i>Benefits</i>	69,877	47,225	117,102
<i>Other Expenses</i>	-	-	-
<b>Total</b>	<b>\$ 459,673</b>	<b>\$ 226,792</b>	<b>\$ 686,464</b>
<b>Academic Advising</b>			
<i>Salaries:</i>			
Lead Advisor (MSC) SSP IV	68,750	5,050	73,800
Academic Advisor (MSC) SSP II	51,648	-	51,648
Academic Advisor (MSC) SSP II (new)	-	56,400	56,400
Academic Advisor (MSC) SSP II (new)	-	56,400	56,400
Retention Specialist/Advisor SSP II	51,648	-	51,648
Retention Specialist/Advisor SSP II	51,648	-	51,648
Retention Specialist/Advisor SSP II	51,648	-	51,648
Retention Specialist/Advisor SSP III	58,008	2,030	60,038
Retention Specialist/Advisor SSP III	57,708	2,020	59,728
Retention Specialist/Advisor SSP III	56,856	-	56,856
Retention Specialist/Advisor SSP III	57,708	1,800	59,508
Retention Specialist/Advisor SSP III (new)	-	75,060	75,060
Salary reserves for IRP & GSI	-	16,837	16,837
<i>Student Salaries (new)</i>	-	36,000	36,000
<i>Benefits</i>	309,207	158,256	467,463
Advising Technical Infrastructure	117,000	-	117,000
<i>Other Expenses</i>	24,000	28,336	52,336
<b>Total</b>	<b>\$ 955,829</b>	<b>\$ 438,189</b>	<b>\$ 1,394,018</b>



# CAL POLY

## CPOF Direct Student Support & Advising Summary FY2022/23

	Approved FY 2021-22	New Proposals/ Adjustments	Proposed FY 2022-23
<b>Strategic Enrollment Management</b>			
<i>Salaries:</i>			
Regional Admissions Mgr PNW	60,000	-	60,000
Rgnl Admissions Mgr Chicago	65,004	-	65,004
Regional Admissions Mgr Dallas	60,000	-	60,000
Regional Admissions Mgr Denver	65,004	-	65,004
Regional Admissions Mgr Honolu	65,004	-	65,004
Regional Admissions Mgr NorCal	62,004	-	62,004
Salary reserves for IRP & GSI	30,468	(5,572)	24,896
<i>Benefits</i>	234,516	31,252	265,769
<i>Other Expenses</i>	-	-	-
<b>Total</b>	<b>\$ 642,000</b>	<b>\$ 25,680</b>	<b>\$ 667,680</b>
<b>Student Affairs Programming &amp; Initiatives</b>			
<i>Salaries:</i>			
LatinX Center Coordinator	-	52,837	52,837
NAAI Center	-	11,451	11,451
<i>Benefits</i>	-	27,924	27,924
<i>Other Expenses</i>			
Latinx Center (Operations)	205,000	(66,403)	138,597
Latinx Center (New Space)	150,000	(150,000)	-
NAAI Center	50,000	(17,607)	32,393
PolyCultural Weekend	55,000	-	55,000
Men of Color	40,000	-	40,000
Black Academic Excellence Center	25,000	-	25,000
Dream Center	25,000	-	25,000
Enhanced Student Diversity & Belonging Programming	10,000	-	10,000
Student and Diversity Programming	-	221,093	221,093
<b>Total</b>	<b>\$ 560,000</b>	<b>\$ 79,293</b>	<b>\$ 639,293</b>
<b>OU DI</b>			
<i>Other Expenses</i>			
Beacon Research & Mentoring Program	50,000	-	50,000
Diversity Programming Allocation	-	221,093	221,093
<b>Total</b>	<b>\$ 50,000</b>	<b>\$ 221,093</b>	<b>\$ 271,093</b>
<b>Academic Affairs Programming &amp; Initiatives</b>			
<i>Other Expenses</i>			
Transfer Center	5,000	-	5,000
<b>Total</b>	<b>\$ 5,000</b>	<b>\$ -</b>	<b>\$ 5,000</b>
<b>Total Allocated</b>	<b>\$ 2,986,603</b>	<b>\$ 1,445,647</b>	<b>\$ 4,432,250</b>
Unallocated	\$ (149,603)	\$ 149,603	-
<b>Total Direct Student Support &amp; Advising</b>	<b>\$ 2,837,000</b>	<b>\$ 1,595,250</b>	<b>\$ 4,432,250</b>