



MEMORANDUM

TO: Jeffrey D. Armstrong, President
FROM: Gracie Babatola, Co-chair
Angie Kraetsch, Co-chair
SUBJECT: Cal Poly Opportunity Fee – 2023/24 Recommended Allocations
DATE: December 6, 2022
CC: Cal Poly Opportunity Fee Committee
David Valadez

The Cal Poly Opportunity Fee Committee met December 2, 2022 to discuss recommendations from Provost Jackson-Elmoore regarding the FY2023-24 CPOF budget and expenditure plan. The Committee discussed and recommended approval of base funding in the amount of \$1,252,609 and one-time funding in the amount of \$720,964 as outlined in the below summary:

Table with 4 columns: Description, Approved Base Request, Approved One-time Request, Total. Rows include AVP of OUDI for Academic Initiatives, Sense of Belonging/Out of Class Support, Development/Fundraising Related, CP Scholars, National and International Fellowship and Scholarship Coordination, and Total Budget.

*Detailed schedule of approved allocations is attached

It is important to note that the committee did not approve all of the base requests as proposed. Due to funding limitations, \$247,964 in proposed base requests were recommended and approved to be funded from one-time funds. If there is an ongoing need for these funds, they will need to be resubmitted to the CPOF Committee for consideration and approval as part of the FY2024-25 CPOF budget.

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
Jeffrey D. Armstrong
President

Jennifer Haft



CPOF Proposed Summary FY2019/20 - FY2023/24

	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24		
	Budget	Budget	Budget	Budget	Total Proposed	%	Net Change
Budget/Revenue							
CPOF Revenues	2,114,000	6,425,000	11,348,000	17,729,000	23,057,000		5,328,000
Total Recurring Funding	\$ 2,114,000	\$ 6,425,000	\$ 11,348,000	\$ 17,729,000	\$ 23,057,000		\$ 5,328,000
<i>Financial Aid</i>							
Technology/WOW/SOAR Supplement	270,000	352,800	990,900	838,800	909,900		71,100
Financial Aid	529,434	2,673,983	4,683,100	8,025,700	10,618,600		2,592,900
Total Financial Aid	\$ 799,434	\$ 3,026,783	\$ 5,674,000	\$ 8,864,500	\$ 11,528,500	50%	\$ 2,664,000
<i>Faculty</i>							
Salary/Benefits	298,988	1,341,988	2,837,000	4,432,250	5,764,250		1,332,000
Operating Expenses		-	-	-	-		-
Total Faculty	\$ 298,988	\$ 1,341,988	\$ 2,837,000	\$ 4,432,250	\$ 5,764,250	25%	\$ 1,332,000
<i>Base Direct Student Support & Advising</i>							
Salary/Benefits	958,990	1,681,966	1,772,103	2,894,599	4,243,666		1,349,067
Student Salaries	138,375	197,557	236,500	362,100	362,100		-
Operating Expenses	119,420	117,714	878,000	1,175,551	1,158,484		(17,067)
Subtotal Base Direct Student Support & Advising	1,216,785	1,997,237	2,886,603	4,432,250	5,764,250	25%	1,332,000
Unallocated/Available Base	(201,207)	58,992	397	-	-		-
Subtotal Unallocated/Available Base	(201,207)	58,992	397	-	-	0%	-
Total Direct Student Support & Advising	\$ 1,015,579	\$ 2,056,229	\$ 2,887,000	\$ 4,432,250	\$ 5,764,250	25%	\$ 1,332,000
Total Base Budget	\$ 2,114,000	\$ 6,425,000	\$ 11,398,000	\$ 17,729,000	\$ 23,057,000	100%	\$ 5,328,000
<i>One-Time</i>							
<i>One-Time Direct Student Support & Advising</i>							
Student Salaries	-	-	-	-	63,000		63,000
Operating Expenses	-	-	150,000	-	657,964		657,964
Total One-Time Direct Student Support & Advising	\$ -	\$ -	\$ 150,000	\$ -	\$ 720,964		\$ 720,964
CO Assessment	\$ -	\$ -	\$ 567,400	\$ 886,450	\$ 1,152,850		\$ 266,400



CAL POLY

FY2023/24 CPOF Base Budget

	Approved FY2022-23	New Proposals/ Adjustments	Total Proposed Budget
CP Scholars Program Administration	\$ 768,701	\$ (4,230)	\$ 764,471
Associate Vice Provost	266,426	10,230	276,656
Associate Director	108,744	3,618	112,362
Data & Budget Analyst	92,961	2,870	95,831
Admin. Support Coordinator	78,120	2,462	80,582
Salary Holdings for IRPs (new)	39,410	(23,410)	16,000
Operating Expenses	183,040	-	183,040
CP Scholars Programs & Support	\$ 686,464	\$ 253,791	\$ 940,255
Program Coordinator, Yrs. 1-2 SSP II	99,096	3,301	102,397
Program Coordinator, Yrs. 3-4 SSP II	81,003	3,690	84,693
Program Coordinator, Mentors SSP III	125,556	7,961	133,517
SSP III - Retention Specialist (new)	-	132,406	132,406
SSP II - Financial Aid Counselor (new)	-	106,434	106,434
Student Salaries	326,100	-	326,100
Univ 100 Coordinator	8,928	-	8,928
Univ 100 Lecturers - Student Affairs (20)	23,781	-	23,781
Univ 100 Lecturers - Faculty (10)	22,000	-	22,000
Academic Advising	\$ 1,394,018	\$ 186,461	\$ 1,580,479
Lead Advisor (MSC) SSP IV	130,434	9,505	139,939
Academic Advisor (MSC) SSP II	86,617	2,337	88,954
Academic Advisor (MSC) SSP II	93,060	7,264	100,324
Academic Advisor (MSC) SSP II	93,060	7,264	100,324
Retention Specialist/Advisor SSP II	83,452	6,652	90,104
Retention Specialist/Advisor SSP II	81,192	6,652	87,844
Retention Specialist/Advisor SSP II	89,513	6,652	96,165
Retention Specialist/Advisor SSP III	90,539	7,733	98,272
Retention Specialist/Advisor SSP III	104,276	7,693	111,969
Retention Specialist/Advisor SSP III	95,280	7,323	102,603
Retention Specialist/Advisor SSP III	95,029	7,665	102,694
Retention Specialist/Advisor SSP III	123,849	9,668	133,517
SSP II - MSC Advisor (new)	-	106,434	106,434
Salary Holdings for GSI (new)	22,382	(6,382)	16,000
Advising Technical Infrastructure	117,000	-	117,000
Student Salaries	36,000	-	36,000
Operating Expenses	52,335	-	52,335
Office of University Diversity & Inclusion	\$ 271,093	\$ 156,200	\$ 427,293
Assistant VP DEI Strategic Planning & Networks	120,102	-	120,102
AVP of OUDI for Academic Initiatives (new)	-	156,200	156,200
BEACoN Research & Mentoring Program	150,991	-	150,991
Strategic Enrollment Management	\$ 667,680	\$ 68,123	\$ 735,803
Regional Admissions Mgr PNW	111,042	7,728	118,770
Rgnl Admissions Mgr Chicago	118,097	8,373	126,469



CAL POLY

FY2023/24 CPOF Base Budget

	Approved FY2022-23	New Proposals/ Adjustments	Total Proposed Budget
Regional Admissions Mgr Dallas	95,289	7,728	103,017
Regional Admissions Mgr Denver	102,343	8,373	110,716
Regional Admissions Mgr Honolu	94,440	8,373	102,812
Regional Admissions Mgr NorCal	106,997	7,986	114,983
Salary Holdings for IRP	39,473	(39,473)	-
Operating (new)	-	59,036	59,036
Academic Affairs Program Administration	\$ 5,000	\$ -	\$ 5,000
Transfer Center	5,000	-	5,000
Sense of Belonging / Out of Class Support	\$ 639,293	\$ 324,356	\$ 963,649
Coordinator for Cultural Clubs & Orgs (new)	-	128,200	128,200
Director of EOP (new)	-	140,600	140,600
Latinx Center (\$25k new)	213,200	7,227	220,427
NAAI Center (\$10k new)	50,000	4,329	54,330
PolyCultural Weekend (\$40 new)	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
CultureFest (new)	-	8,000	8,000
CORE Program (new)	-	20,000	20,000
Student Diversity & Belonging Programming	10,000	-	10,000
Enhanced Student & Diversity Programming	221,093	-	221,093
Spanish Translation Stipends (new)	-	16,000	16,000
Development/Fundraising	\$ -	\$ 195,300	\$ 195,300
Senior Director of Development (new)	-	195,300	195,300
National & International Fellowships and Scholarshi	\$ -	\$ 152,000	\$ 152,000
National and International Fellowships and Scholarships (NIFS) Coordinator / Director (new)	-	152,000	152,000
Total Expenses	\$ 4,432,250	\$ 1,332,000	\$ 5,764,250

**CPOF Priorities
2023 - 2024**

Priorities	Request description	Base				Onetime	
		Salary	Benefits	Operational	Total	Operational	Total
1. Assoc VP of OUDI for Academic Initiatives							
	Associate Vice President of OUDI for Academic Initiatives	\$ 100,000	\$ 56,200		\$ 156,200		\$ -
	Faculty Engagement				-	30,000	30,000
	Total Assoc VP of OUDI for Academic Initiatives	100,000	56,200		156,200	30,000	30,000
2. Sense of Belonging / Out of Class Support							
	Coordinator for Cultural Clubs/Orgs	75,000	53,200		128,200		-
	Professional Development				-	5,000	5,000
	Student Programming			-	-	25,000	25,000
	Director of Educational Opportunity Program (EOP)	90,000	50,600		140,600		-
	Professional Development			-	-	5,000	5,000
	Enhanced Student Diversity and Belonging Center Programming				-		-
	CORE program			20,000	20,000	30,000	30,000
	Poly Cultural Weekend			-	-	40,000	40,000
	CultureFest			8,000	8,000	2,000	2,000
	Latinx Center			-	-	25,000	25,000
	Native and Indigenous Cultural Center			-	-	10,000	10,000
	Spanish Translation Stipends			16,000	16,000		-
	Website Conversion to Spanish				-	220,000	220,000
	Simultaneous Interpretation Equipment				-	15,000	15,000
	DEI related website and programming (HSI, African American initiatives)				-	45,000	45,000
	CP Alumni Identity-Based Affinity Programming				-	5,000	5,000
	Total Sense of Belonging / Out of Class Support	165,000	103,800	44,000	312,800	427,000	427,000
3. Development / Fundraising Related							
	Total Development / Fundraising Related	125,000	70,300		195,300		-
4. CP Scholars							
	SSP III - Retention Specialist	77,406	55,000		132,406		-
	SSP II - MSC Advisor	62,234	44,200		106,434		-
	SSP II - Financial Aid Counselor	62,234	44,200		106,434		-
	Operating Budget for regional admissions			59,036	59,036	100,964	100,964
	Student Assistants - MSC Peer Advisors (2)				-	18,000	18,000
	Student Assistants (10) - CP Scholars				-	45,000	45,000
	IRP's	22,857	9,143		32,000		-
	Total CP Scholars	224,731	152,542	59,036	436,309	163,964	163,964
5. National and International Fellowships and Scholarship Coordination							
x	National and International Fellowships and Scholarships (NIFS) Coordinator / Director	94,000	58,000		152,000		-
x	NIFS Professional Development			-	-	5,000	5,000
x	Faculty Engagement - interview prep, travel, other related activities				-	25,000	25,000
x	Student Engagement - programming, operational support, institutional memberships				-	20,000	20,000
x	Website Design/Development (student opportunities, communications)				-	50,000	50,000
x	*Potentially bridge one-time funding for some of the items tied to Operating budget for regional admissions and Sense of Belonging if not covered through base funds this year.				-		
	Total National and International Fellowships and Scholarship Coordination	94,000	58,000	-	152,000	100,000	100,000
Total Budget Requests		\$ 708,731	\$ 440,842	\$ 103,036	\$ 1,252,609	\$ 720,964	\$ 720,964
	Available				\$ 1,332,000		\$1,000,000
	Benefits/GSI Funding						79,391
	Total Adjusted Base Available				1,252,609		
	Amount over/under available CPOF Funds				\$ -		\$ 279,036

Support for regional admissions officers

Fall Travel	59,000
Yield Events	60,000
Add't travel/events	41,000
Total	160,000