



MEMORANDUM

Code: AA-2006-38

**Initial Replies Requested by Opening Fall Due Date
(See Attachment A) and October 31, 2006**

To: Presidents

Date: September 12, 2006

From: Gary W. Reichard
Executive Vice Chancellor
Chief Academic Officer

Richard P. West
Executive Vice Chancellor
Chief Financial Officer

Re: 2006-07 Enrollment Planning and Resources Cycle

Thank you for sharing your insights, comments, and concerns about enrollment planning at the August Executive Council meeting. During this year's enrollment planning and resources cycle, we will be working with you and your designated Enrollment Planning & Resources (EPR) Officer:

- To review campus enrollments, estimates, plans, and proposals in September and October 2006;
- To discuss campus enrollment proposals for CY 2007-08 support budget FTES targets before the November 2006 meeting of the Board of Trustees;
- To provide more detailed multiyear planning estimates by discipline to support the CY 2008-2009 capital outlay program, as well as multiyear academic and technology planning processes; and
- To begin the process of setting multiyear planning estimates and parameters for academic, capital, and technology purposes that reflect rebenching and anticipated infrastructure needs for all students.

This memorandum focuses on providing you and your staff members with detailed information to help us address these issues. We thank you and your staff members in advance for your assistance in working with us.

(continued on the next page)

Distribution: Enrollment Planning & Resources Officer (designated by the President)
 Vice Presidents/Provosts, Academic Affairs
 Vice Presidents, Administration
 Vice Presidents/Deans, Student Affairs
 Vice Presidents, Information Resources Management
 Deans, Extended Education
 Chief Budget Officers
 Chief Facilities Planners/Executive Deans
 Chief Enrollment Management Officers
 Chief Academic Programs Planners
 Chief Academic Resource Planners
 Directors, Institutional Research
 Deans/Directors, Admissions and Records
 Directors, Computer Center
 Coordinators, APDB

CSU Presidents
AA 2006-38
Enrollment Planning & Resources
September 12, 2006
Page 2

Enrollment Planning & Resources Submissions: CY 2006-2007 Enrollment Estimates and CY 2007-2008 Enrollment Proposals and Plans

By the campus' Opening Fall Term due date (see Attachment A), the 2006-07 Opening Term Excel Workbook should be completed to reflect campus actual census-date enrollments for summer and fall terms along with estimates and proposals for subsequent terms. The campus should email the campus' completed Excel Workbook of CY 2006-2007 detailed enrollment information and CY 2007-2008 enrollment proposals to Dr. Marsha Hirano-Nakanishi, Assistant Vice Chancellor, Academic Research and Resources, at mhirano-nakanishi@calstate.edu. A copy of the summary page of the EXCEL workbook should be signed by the President (or person designated by the President) and faxed to Dr. Hirano-Nakanishi at 562-951-4981.

It is anticipated that budgeted CY 2007-2008 FTES targets will be released for planning purposes shortly after the November 2006 meeting of the Board of Trustees. The winter and spring term opening term EXCEL workbook submissions should reflect actual and estimated CY 2006-2007 enrollments, as well as adjusted enrollment plans for CY 2007-2008.

The "2006-07 Opening Term Excel Workbook" is available at the following URL under the Enrollment Planning Documents section:

http://www.calstate.edu/acadres/enrollment_planning.shtml

If your staff members have any difficulty with the download, please contact Ms. Terry Monzon, who is available at tmonzon@calstate.edu and 562-951-4754.

It may be useful to refer to the August 3, 2006, memorandum sent to you regarding the 2006-07 Final Budget Enrollment Allocation as it discussed important and complex changes with regard to budgeted enrollments. The two main points were:

1. The State's agreement that CSU should count graduate student FTES in the same way as the UC and the rest of the nation, and enrollment base and growth beginning in 2006-07 reflects this change.
2. The State's decision to no longer provide marginal cost General Fund support for most nonresident student *growth*, because such students already pay the total average cost of their instruction through nonresident tuition.

A copy of the memorandum and attachments are available at the above Enrollment Planning URL under the Enrollment Planning Documents section as references for you and your staff.

In addition, materials shared at workshops last spring on the graduate student FTES calculation methodology and the resulting CY 2005-06 "rebenched" baselines and CY 2006-07 "rebenched"

targets, as well as procedures followed to split these baselines into resident and nonresident tuition (NRT) components, have been posted at:

http://www.calstate.edu/acadres/Rebenching_NRT_Resident.shtml

As above, these materials also are accessible at the general Enrollment Planning URL under the Enrollment Planning Documents section. For more information about CSU students and their appropriate placement into resident and NRT categories, please contact Dr. James Blackburn, Associate Director of Enrollment Management Services, jblackburn@calstate.edu. Dr. Philip Garcia, Senior Director of Analytic Studies, pgarcia@calstate.edu, can provide more detail about Enrollment Reporting System (ERS) coding specifications for graduate students, NRT students, and resident students.

Multiyear Enrollment Planning

The Compact with the Governor calls for the CSU to increase enrollments by 2.5% per year through CY 2010-11. During 2004-05, the Executive Council carefully reviewed campus FTES planning estimates through CY 2010-11, and they were revised and finalized through 2015-16. These multiyear planning estimates, used to support CY 2006-07 capital planning, along with the standard planning parameters and campus summer and off-campus center adjustments, are posted as "CY 2005-06 Target and Multiyear Planning Estimates and Parameters to Support CY 2006-07 Capital Planning" at the following URL under Targets and Planning Estimates:

http://www.calstate.edu/acadres/enrollment_planning.shtml

These multiyear planning estimates and parameters were used to support CY 2007-08 Capital Planning.

Campus facility planners now are due to prepare documents and plans for the CY 2008-09 capital planning cycle. At the spring 2006 workshops on the graduate differential and rebenching, we agreed that considerations regarding implementation of the graduate differential and rebenching for academic program, technology, and capital purposes required continued discussion. With the support budget focus on *resident* FTES, matters are further complicated.

As such, we have decided to ask that campuses begin by preparing documents for the CY 2008-09 capital planning cycle using the same posted multiyear planning estimates and parameters. We anticipate having revised multiyear planning estimates and parameters that reflect rebenching sometime in spring 2007.

To ground the transition from existing multiyear planning estimates to revised estimates, at the request of Capital Planning, Design, and Construction (CPDC) and Academic Affairs, we have

CSU Presidents
AA 2006-38
Enrollment Planning & Resources
September 11, 2006
Page 4

moved the call for long-range disciplinary enrollment projections from the annual call for State and Nonstate Funded Capital Outlay Program plans to this memorandum.

Long-range academic disciplinary enrollment projections for the campus sum to the campus' multiyear planning estimates. While these disciplinary projections, CPDC 2-1, are required by the State as part of the justification for new lecture and laboratory space, they also are used to guide other campus academic resource plans.

By October 31, 2006, Academic Enrollment Projections by Discipline (CPDC 2-1) should be submitted to Dr. Marsha Hirano-Nakanishi, Assistant Vice Chancellor, Academic Research and Resources, at mhirano-nakanishi@calstate.edu, and Elvyra San Juan, Assistant Vice Chancellor, Capital Planning, Design, and Construction, at esanjuan@calstate.edu. The CPDC 2-1 form and instructions for completion can be downloaded from the Chancellor's Office Facilities Planning Web page:

http://www.calstate.edu/cpdc/Facilities_Planning/majorcapoutlay.shtml

For assistance in accessing the form and instructions, please contact Judi Brown in CPDC, jbrown@calstate.edu.

If academic planners or analysts have questions about CPDC 2-1, please contact Marsha Hirano-Nakanishi, at mhirano-nakanishi@calstate.edu.

In addition, there are a number of additional CPDC forms that need to be completed if the campus is submitting a proposal for disciplinary classroom or laboratory space. The above website provides information about these forms and their purpose. Questions regarding the state-funded submissions should be directed to Larry Piper, Chief of Facilities Planning, Capital Planning, Design and Construction, at lpiper@calstate.edu

Finally, after careful deliberation and consensus from campus colleagues who have oversight responsibilities for use of FTES as viewed from the perspective of course offerings, changes are being made to the Academic Planning Data Base (APDB) that will underpin the rebenching from the perspective of course offerings. Mike McLean, Information Management and Administration and Enterprise Applications Services, at mmclean@calstate.edu and Ron Basich, Enterprise System, at rbasich@calstate.edu are overseeing communications with campus coordinators of APDB.

GWR/RPW/mjhn

Enrollment Planning & Resources Term Milestone Dates, CY 2006-07

<i>Fall 2006</i>			
Campus Name	Classes Begin	Semester/Quarter Census Date	EP&R Opening Term Excel Workbook Due
Bakersfield	12-Sep-06	02-Oct-06	09-Oct-06
Channel Islands	28-Aug-06	25-Sep-06	02-Oct-06
Chico	21-Aug-06	18-Sep-06	25-Sep-06
Dominguez Hills	28-Aug-06	25-Sep-06	02-Oct-06
East Bay	27-Sep-06	17-Oct-06	24-Oct-06
Fresno	28-Aug-06	25-Sep-06	02-Oct-06
Fullerton	21-Aug-06	18-Sep-06	25-Sep-06
Humboldt	21-Aug-06	18-Sep-06	25-Sep-06
Long Beach	28-Aug-06	25-Sep-06	02-Oct-06
Los Angeles	21-Sep-06	11-Oct-06	18-Oct-06
Maritime Academy	05-Sep-06	02-Oct-06	09-Oct-06
Monterey Bay	28-Aug-06	25-Sep-06	02-Oct-06
Northridge	05-Sep-06	02-Oct-06	09-Oct-06
Pomona	21-Sep-06	12-Oct-06	19-Oct-06
Sacramento	05-Sep-06	02-Oct-06	09-Oct-06
San Bernardino	21-Sep-06	11-Oct-06	18-Oct-06
San Diego	28-Aug-06	25-Sep-06	02-Oct-06
San Francisco	28-Aug-06	25-Sep-06	02-Oct-06
San Jose	23-Aug-06	20-Sep-06	27-Sep-06
San Luis Obispo	25-Sep-06	13-Oct-06	20-Oct-06
San Marcos	24-Aug-06	21-Sep-06	28-Sep-06
Sonoma	22-Aug-06	19-Sep-06	26-Sep-06
Stanislaus	06-Sep-06	03-Oct-06	10-Oct-06
<i>Winter 2007</i>			
Campus Name	Classes Begin	Semester/Quarter Census Date	EP&R Opening Term Excel Workbook Due
Bakersfield	02-Jan-07	23-Jan-07	30-Jan-07
East Bay	08-Jan-07	29-Jan-07	05-Feb-07
Los Angeles	02-Jan-07	23-Jan-07	30-Jan-07
Pomona	02-Jan-07	23-Jan-07	30-Jan-07
San Bernardino	08-Jan-07	29-Jan-07	05-Feb-07
San Luis Obispo	08-Jan-07	29-Jan-07	05-Feb-07
Stanislaus	03-Jan-07	10-Jan-07	18-Jan-07

Enrollment Planning & Resources Term Milestone Dates, CY 2006-07

<i>Spring 2007</i>			
Campus Name	Classes Begin	Semester/Quarter Census Date	EP&R Opening Term Excel Workbook Due
Bakersfield	26-Mar-07	16-Apr-07	23-Apr-07
Channel Islands	22-Jan-07	16-Feb-07	23-Feb-07
Chico	22-Jan-07	16-Feb-07	23-Feb-07
Dominguez Hills	22-Jan-07	16-Feb-07	23-Feb-07
East Bay	02-Apr-07	20-Apr-07	27-Apr-07
Fresno	17-Jan-07	13-Feb-07	21-Feb-07
Fullerton	22-Jan-07	16-Feb-07	26-Feb-07
Humboldt	16-Jan-07	12-Feb-07	19-Feb-07
Long Beach	29-Jan-07	23-Feb-07	02-Mar-07
Los Angeles	26-Mar-07	16-Apr-07	23-Apr-07
Maritime Academy	08-Jan-07	05-Feb-07	12-Feb-07
Monterey Bay	22-Jan-07	16-Feb-07	23-Feb-07
Northridge	29-Jan-07	23-Feb-07	02-Mar-07
Pomona	26-Mar-07	16-Apr-07	23-Apr-07
Sacramento	29-Jan-07	23-Feb-07	02-Mar-07
San Bernardino	02-Apr-07	20-Apr-07	27-Apr-07
San Diego	18-Jan-07	14-Feb-07	21-Feb-07
San Francisco	24-Jan-07	20-Feb-07	27-Feb-07
San Jose	24-Jan-07	20-Feb-07	27-Feb-07
San Luis Obispo	02-Apr-07	20-Apr-07	27-Apr-07
San Marcos	20-Jan-07	15-Feb-07	22-Feb-07
Sonoma	29-Jan-07	26-Feb-07	05-Mar-07
Stanislaus	13-Feb-07	12-Mar-07	19-Mar-07