

MEMORANDUM

Code: AA-2008-31

**Initial Fall Reply Requested by Opening Term
due date (see Attachment A)**

To: Presidents

Date: August 28, 2008

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


Richard P. West
Executive Vice Chancellor
Chief Financial Officer

Re: 2008-09 Enrollment Planning and Resources Cycle

Thank you for your input at the Executive Council regarding CY 2008-09 enrollments and considerations concerning CY 2009-10 support-budget FTES. The two enrollment planning and resources objectives for the cycle are:

- To review and report on institutional CY 2008-09 enrollments and estimates & CY 2009-10 plans in fall 2008, winter 2009, and spring 2009; and
- To use revised institutional multiyear planning estimates to inform CY 2010-11 capital outlay program plans, as well as multiyear enrollment, academic, and technology planning processes.

Campus outreach, admissions, registration, and institutional research officers are essential to the enrollment planning and resource processes. Enrollment Planning & Resources (EP&R) officers also should be prepared to work with other campus officers on enrollment-related processes in academic, budget, technology, and capital planning. Please contact Assistant Vice Chancellor Marsha Hirano-Nakanishi, mhirano-nakanishi@calstate.edu, with updates regarding the institutional EP&R officer.

Enrollment Updates and Plans

At the campus' Opening Term due dates (see Attachment A), the 2008-09 EP&R EXCEL workbook, which will be emailed to the EP&R officer, should be completed and emailed to Dr. Marsha Hirano-Nakanishi, Assistant Vice Chancellor of Academic Research and Resources, at mhirano-nakanishi@calstate.edu.

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The workbook includes two spreadsheets, one for CY 2008-09 terms (summer 2008, fall 2008, winter 2009, and spring 2009) and one for CY 2009-10 (summer 2009, fall 2009, winter 2010, and spring 2010).

It is especially important in this cycle that the EP&R officer also submits with the fall 2008 EP&R workbook:

- Efforts that the institution undertook to increase state-supported instruction for summer 2008 and information regarding the use of campus facilities during summer 2008 to enhance town-and-gown relations, employer-institution partnerships, and regional reputation and development **(for mandatory report due to the State);**
- The institution's fall 2008 enrollment planning target and the major factors affecting enrollment management to the planned goal; and
- In addition to the fall 2008 EP&R EXCEL workbook which will contain the institution's CY 2008-09 FTES estimate and if the institution estimates that it will provide more resident FTES of instruction in 2008-09 than budgeted, a report on how the instruction was funded **(mandatory report due to the State).**

Multiyear Institutional Projections and Planning Parameters

Revised multiyear enrollment projections were finalized with Presidents and submitted as part of a report to the State in 2007-08. The institution's projections will be emailed to the EP&R officer by Dr. Marsha Hirano-Nakanishi, Assistant Vice Chancellor of Academic Research and Resources; revisions to the institutional planning parameters will be emailed back to Hirano-Nakanishi for posting. As reminders:

- The revised enrollments are rebenchmarked, include both resident and NRT enrollments, and extend to 2020-21.
- The Access to Excellence review and report recognized the need for the CSU to meet the State's need for baccalaureate and higher degree recipients, and analysis confirmed that continued 2.5% growth could be viewed as conservative.
- Institutions may allocate their CY FTES planning estimates between CPEC-approved off-campus centers and the main campus and between the academic year and summer consistent with institutional academic and enrollment plans.
- Institutions may not adjust the non-lecture and laboratory deductions from academic year FTES in the planning estimates workbook.
- The State continues to have expectations regarding summer instruction that mitigate against planning for new lecture and laboratory space.