

Leveraging Collaboration with Academic Leadership to Improve Resource Allocation at Sonoma State University

Allocating Resources, Centering Students, and Sustaining Momentum

Sonoma State University is a public institution located in Sonoma County, California. One of the smallest members of the California State University system, its current enrollment is approximately 6,100 students. Sonoma State is in a region where the number of high school students is declining, and college readiness scores of regional high school graduates are lower than in other areas of the state. These factors have strengthened the institution's commitment to meeting the needs of current students, building on past successful efforts to improve student completion rates, despite significant revenue declines.

Setting the Stage for a Sustainable Future State

Due to unprecedented multi-year declines in enrollment and corresponding loss of revenue, executive leaders at Sonoma State knew that material changes to offerings and related planning and budgeting practices were required. The provost and chief business officer (CBO) believed solid collaboration between their offices was essential, as decisions were evaluated and diminished resources were allocated. The CBO was new to the university, and the provost was preparing to revise Sonoma's academic master plan congruous to the CBO's arrival.

Mutual respect and a commitment to innovate together were quickly established between these two executives through frank conversations and a willingness to explore new ways of working that would center student outcomes as difficult decisions were made. Both executive leaders came to the work with a deep commitment to ensure that future academic offerings aligned with evolving student and labor market needs and that a balanced budget must be maintained.

Leveraging Models to Prompt Thinking and Conversation

Sonoma State's CBO and provost collaborated with other leaders in academics, institutional research, and finance to use the NACUBO Student Success Hub toolkits to facilitate ideation.

Improvement Project

Collaborating With Academic Leaders to Improve Resource Allocation Practices

Toolkit Used

IPEDS Peer Benchmarking Dashboards
Financial Impact Analysis
Budget Builder

Results

- Working in close partnership, the CBO supported the provost's efforts to update the institution's academic master plan in response to double-digit enrollment drops. A revised approach to resource allocation was developed, supported by planning and budgeting activities that leveraged pro-forma financial models to inform decisions.
- Improved planning and budgeting efforts helped to identify what work could be accomplished with internal expertise and capacity and what the analysis needed to be outsourced for faster turnaround.



“There are opportunities that exist when there are challenges that must be addressed. There was a need to look at the needs and expectations of the students and the labor market and re-envision the institution collaboratively with academic leadership. The NACUBO tools served as catalysts for so much of our work here, and provided resources for me, as the CFO, and the provost to leverage as we worked together.”

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M. Monir Ahmed,

*Vice President for Administration
and Finance/CFO*

The IPEDS Peer Benchmarking Dashboards and Financial Impact Analysis offered dynamic dashboards that served as references and supported work to identify needed information for a more robust program review. These foundational conversations and review of NACUBO’s tool led to a decision to hire an external program audit firm that could more quickly complete a comprehensive financial program review for Sonoma State.

Reviewing Budget Builder’s templates and discussion guides prompted a systems-thinking approach to future resource needs. The templates helped to level-set awareness of the interdependency of expertise and capacity required to effect changes based on changes to resource allocation.

Preparing for Changes that Lead to Financial Sustainability

With foundational changes to planning and budgeting practices established and new ways of working adopted, Sonoma State’s CBO continues to work in close partnership with the provost and interdisciplinary colleagues. Together, the leadership team is preparing for a long-term journey to develop a sustainable infrastructure and processes that prioritize students’ needs and lead to fiscal sustainability.

The CBO regularly expresses a commitment to transparency, acknowledging the reality of the long-term challenges faced by the institution in response to financial stressors. The executive leaders also regularly express a sincere commitment to honoring the relationships with union leadership and their members. After a year of collaborative work and resource analysis, the institution is consolidating academic leadership and moving towards more interdisciplinary academic program models.

Sustaining Momentum

Sonoma State University will continue to respond to enrollment and economic challenges with a commitment to continuous improvement of planning and resource allocation practices. The institution hopes to improve enrollments through innovations to its academic and student support offerings. The next steps will include expanded use of data and dashboards to inform decisions. The CBO expects to continue to reference and leverage toolkits in the NACUBO Student Success Hub to maintain and sustain the institution’s past success in achieving equitable student outcomes and continue to move the university toward sustainable financial health.