### Form A - Budget Plan Summary

**Operating Requests (Form B1)**
- My agency is submitting the following recurring budget requests in priority order (Form B1):
  1. Base Appropriations Increase
  2. Clemson University Health Innovation – Extension Programming
  3. Clemson University Safety & Security
  4. Clemson University - Center for Advanced Manufacturing
  5. Changes to Other Earmarked Funds in I.A E&G Unrestricted and III. Employee Benefits Budgets
  6. Changes to Other Restricted Funds in I.B E&G Restricted and III. Employee Benefits Budgets
  7. Changes to Other Earmarked Funds in II. Auxiliary Enterprises and III. Employee Benefits Budgets
  8. Changes to Federal Restricted Funds in I.B E&G Restricted and III. Employee Benefits Budgets
  9. Changes to Federal Funds in I.A E&G Unrestricted Budgets

For FY 2020-21, my agency is (mark “X”):
- X Requesting General Fund Appropriations.
- X Requesting Federal/Other Authorization.
- Not requesting any changes.

**Non-Recurring Requests (Form B2)**
- For FY 2020-21, my agency is (mark “X”):
- Requesting Non-Recurring Appropriations.
- Requesting Non-Recurring Federal/Other Authorization.
- Not requesting any changes.

**Capital Requests (Form C)**
- My agency is submitting the following one-time capital budget requests (Form C):
  10. E&G Planned Maintenance and Renewal Projects

For FY 2020-21, my agency is (mark “X”):
- X Requesting funding for Capital Projects.
- Not requesting any changes.

**Provisos (Form D)**
- For FY 2020-21, my agency is (mark “X”):
- X Requesting a new proviso and/or substantive changes to existing provisos.
- Only requesting technical proviso changes (such as date references).
- Not requesting any proviso changes.

Please identify your agency’s preferred contacts for this year’s budget process.
<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anthony E. Wagner</td>
<td>(864)656-2421</td>
<td><a href="mailto:wagnera@clemson.edu">wagnera@clemson.edu</a></td>
</tr>
<tr>
<td>Steven H. Crump</td>
<td>(864)656-0586</td>
<td><a href="mailto:crumps@clemson.edu">crumps@clemson.edu</a></td>
</tr>
</tbody>
</table>

I have reviewed and approved the enclosed FY 2020-21 Agency Budget Plan, which is complete and accurate to the extent of my knowledge.

<table>
<thead>
<tr>
<th>Sign/Date:</th>
<th>Agency Director</th>
<th>Board or Commission Chair</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>James P. Clements</td>
<td>E. Smyth McKissick III, Chairman</td>
</tr>
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This form must be signed by the agency head – not a delegate.
**Fiscal Year 2020-21 Budget Request Executive Summary**

**Agency Code:** 1120  
**Agency Name:** Clemson University - Education & General  
**Section:** 14

<table>
<thead>
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<th>Priority</th>
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**TOTAL BUDGET REQUESTS**  
42,300,000 | 6,930,585 | 48,035,281 | 10,264,389 | 107,548,255 | 79.00 | 0.00 | 80.00 | 0.00 | 159.00
AGENCY NAME: Clemson University

AGENCY CODE: H120

SECTION: 14

FORM B1 – RECURRING OPERATING REQUEST

AGENCY PRIORITY 1

Provide the Agency Priority Ranking from the Executive Summary.

TITLE Base Appropriations Increase

Provide a brief, descriptive title for this request.

AMOUNT

General: $9,600,000
Federal:
Other:
Total: $9,600,000

What is the net change in requested appropriations for FY 2020-21? This amount should correspond to the total for all funding sources on the Executive Summary.

NEW POSITIONS 22.0

Please provide the total number of new positions needed for this request.

FACTORS ASSOCIATED WITH THE REQUEST

Mark “X” for all that apply:

X  Change in cost of providing current services to existing program audience
    Change in case load/enrollment under existing program guidelines
    Non-mandated change in eligibility/enrollment for existing program
X  Non-mandated program change in service levels or areas
    Proposed establishment of a new program or initiative
    Loss of federal or other external financial support for existing program
    Exhaustion of fund balances previously used to support program
    IT Technology/Security related
    Consulted DTO during development
    Related to a Non-Recurring request – If so, Priority #

STATEWIDE ENTERPRISE STRATEGIC OBJECTIVES

Mark “X” for primary applicable Statewide Enterprise Strategic Objective:

X  Education, Training, and Human Development
    Healthy and Safe Families
    Maintaining Safety, Integrity, and Security
    Public Infrastructure and Economic Development
    Government and Citizens

ACCOUNTABILITY OF FUNDS

This base funding increase request supports the University’s enterprise objectives for Education, Training and Human Development and Public Infrastructure and Economic Development. This request focuses on enhancing retention and graduation rates, contributing to an educated workforce in South Carolina, preparing students to lead into the future with science and technology innovation, and funding mandatory costs.

What specific strategy, as outlined in the FY 2019-20 Strategic Planning and Performance Measurement template of agency’s accountability report, does this funding request support? How would this request advance that strategy? How would the use of these funds be evaluated?
RECIPIENTS OF FUNDS

The majority of funds received for this initiative will be used for program costs, positions and operating costs for existing academic departments responsible for facilitating the success of the program. Clemson University will adhere to state procurement policies and procedures for any acquisition of goods and services with these funds, if necessary.

What individuals or entities would receive these funds (contractors, vendors, grantees, individual beneficiaries, etc.)? How would these funds be allocated – using an existing formula, through a competitive process, based upon predetermined eligibility criteria?

JUSTIFICATION OF REQUEST

Clemson University respectfully requests an increase of $9,600,000 to the recurring state appropriations base budget in an effort to slow the growth of tuition costs and continue to ensure affordable education opportunities for in-state students.

Keeping Clemson accessible and affordable for in-state students is a priority for the University. Clemson continues to remain accessible for in-state students. From 2009 - 2018, in-state enrollment has increased by 25%, or 3,115+ students. Clemson has ensured that nearly 100% of enrolled in-state freshmen receive financial aid. Clemson continues to remain affordable for incoming and continuing in-state students while offering a top-27 quality public education without having to leave the state of South Carolina. Out-of-pocket costs are low at ~37% for new undergraduate students and have remained stable at ~one-third of sticker price since 2009.

The percentage of students graduating with debt (46%) is less than state (58%) and national (65%) averages. Student loan default rates (1.9%) are significantly lower than the national average (10.8%), indicating students are better able to repay loans after graduation.

Divestments, internal reallocations, entrepreneurial revenues, and fundraising efforts have allowed Clemson to invest in faculty, instruction and research activities, facilities and infrastructure, and life safety and security, while only modestly increasing tuition and fees. The University continuously uses LEAN process improvement strategies campus-wide in an effort to contain costs and improve efficiencies. Even so, the University’s model that depends heavily on cost savings and reallocations for continued investments, especially with the recurring financial impact of the Retirement System Funding and Administration Act of 2017 and other mandated costs, is unsustainable. Significant growth in fringe benefits costs means less resources available for growth in university-funded scholarships and investments in faculty and advising to ensure students receive a quality education while graduating on-time.

Without modest tuition and fee increases and/or additional investment in recurring state appropriations, the University would be unable to manage rising mandatory, inflationary, and compliance costs while continuing to invest in providing a quality education and scholarship opportunities to Clemson students. While the State has provided additional state appropriations in recent years, and Clemson is appreciative, the University’s current E&G recurring state funding is still $17.7 million less than FY 2007-08 funding levels. Currently E&G state appropriations per student are approximately $4,400 which is $2,500 less per student than FY 2007-08 at $6,900; when adjusted for inflation, current per student funding is less than half that in FY 2007-08.

Clemson’s state funding request to slow the growth of tuition costs and continue to ensure affordable education opportunities for in-state students will allow the University
<table>
<thead>
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<th>AGENCY NAME: Clemson University</th>
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<tbody>
<tr>
<td>AGENCY CODE: H120</td>
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</table>

| SECTION: 14 |

<table>
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<tr>
<th>to provide for:</th>
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</table>

1. Compliance with all applicable laws, regulations, and mandates
   - Estimate of increase in E&G employer retirement contributions - $3,900,000
   - Estimate of increase in E&G insurance, compliance, and health and environmental safety requirements - $980,000
   - Cost of living salary increases (COLA) for Clemson employees – TBD

2. Student success
   - Continue to provide students with a quality educational experience that will prepare them to lead the way - $3,340,000 and 22 FTEs for faculty

3. Inflationary Operational Costs
   - Estimate of E&G inflationary increases to recurring operating operations - $1,380,000

Please thoroughly explain the request to include the justification for funds, potential offsets, matching funds, and method of calculation. Please include any explanation of impact if funds are not received. If new positions have been requested, explain why existing vacancies are not sufficient.
**FORM B1 – RECURRING OPERATING REQUEST**

**AGENCY PRIORITY**
2

Provide the Agency Priority Ranking from the Executive Summary.

**TITLE**
Clemson University Health Innovation – Extension Programming

Provide a brief, descriptive title for this request.

**AMOUNT**

| General: | $1,300,000 |
| Federal: |            |
| Other:   |            |
| **Total:** | **$1,300,000** |

What is the net change in requested appropriations for FY 2020-21? This amount should correspond to the total for all funding sources on the Executive Summary.

**NEW POSITIONS**
14.0

Please provide the total number of new positions needed for this request.

**FACTORS ASSOCIATED WITH THE REQUEST**

| Mark “X” for all that apply: |
| Change in cost of providing current services to existing program audience |
| Change in case load/enrollment under existing program guidelines |
| Non-mandated change in eligibility/enrollment for existing program |
| Non-mandated program change in service levels or areas |
| X Proposed establishment of a new program or initiative |
| Loss of federal or other external financial support for existing program |
| Exhaustion of fund balances previously used to support program |
| IT Technology/Security related |
| Consulted DTO during development |
| Related to a Non-Recurring request – If so, Priority # _________ |

**STATEWIDE ENTERPRISE STRATEGIC OBJECTIVES**

| Mark “X” for primary applicable Statewide Enterprise Strategic Objective: |
| Education, Training, and Human Development |
| Healthy and Safe Families |
| Maintaining Safety, Integrity, and Security |
| X Public Infrastructure and Economic Development |
| Government and Citizens |

**ACCOUNTABILITY OF FUNDS**

The funding request for the Health Innovation Extension Programming initiative supports the University’s enterprise objective for Public Infrastructure and Economic Development. The program’s focus on educating communities on healthy living promotes and supports dissemination of formalized foundational and applied scholarship, outreach, and public service beyond the University.

What specific strategy, as outlined in the FY 2019-20 Strategic Planning and Performance Measurement template of agency’s accountability report, does this funding request support? How would this request advance that strategy? How would the use of these funds be evaluated?
The majority of the funds received for this initiative will be used for program costs, positions and operating costs for existing departments responsible for facilitating the success of the program. Clemson University will adhere to state procurement policies and procedures for any acquisition of goods and services with these funds, if necessary.

What individuals or entities would receive these funds (contractors, vendors, grantees, individual beneficiaries, etc.)? How would these funds be allocated – using an existing formula, through a competitive process, based upon predetermined eligibility criteria?

Clemson University, in collaboration with the Medical University of South Carolina (MUSC), wants to partner with rural hospitals, physician practices, home health agencies, local government, and other key stakeholders to improve health outcomes and equity in rural South Carolina. Clemson University faculty, staff, and institutional resources complement MUSC resources and capacity in several ways that will ensure both institutions will have a greater collective impact on health outcomes for these citizens and communities. Clemson does this through a true integrated partnership between the Cooperative Extension Service, the Joseph F. Sullivan Center, and the Department of Public Health Sciences.

Since the late 1970’s, the nurse practitioners of Clemson University have been delivering health care to underserved communities across the Upstate Region and beyond. In 2016, the legislature provided Clemson funding for a large (three exam room) solar-powered mobile health van to deliver primary health screenings and labs (e.g. cancer, cardiovascular, lifestyle), providing lifestyle education and wellness counselling, and follow-up clinical care to South Carolinians living without health insurance or in communities where few health resources exists. The success of the Clemson mobile health clinic outreach helped shape the new health innovation-extension partnership between MUSC and Clemson in health extension and outreach. In 2019, the legislature expanded the mobile health clinic fleet by funding two additional runabout (one exam room) mobile health clinics which will soon be leveraged to improve the efficiency and versatility in supporting various regions of the state.

Recurring support from the state for the health innovation initiative, will ensure our initial four health extension programs continue in three counties coupled with expanded cancer screening and preventive care in nine additional counties. The funding will allow Clemson to also expand beyond its initial efforts toward a regional vision that would support the Upstate, Midlands, Pee Dee, and Low Country regions of the state in a deeper and more cost-effective manner as outlined below.

Continuing our health extension programming:
In 2019 and into 2020, Clemson mobile health clinics and the MUSC Hollings Cancer Center mobile health clinic will continue to travel and operate together in outreach trips into rural South Carolina counties in each of the state’s four regions. Working together, Clemson and MUSC does/will deliver underserved communities primary health screenings and labs (e.g. cancer, cardiovascular, lifestyle), expand the SC Mother’s Milk Bank and other programs (e.g. safe sleep) aimed at combatting infant mortality, expand childhood obesity programs in schools (to include school gardens), and combat opioid addiction through innovation in care of chronic pain management patients.

New proposed regional expansion for the Upstate, Midlands, and Pee Dee regions:
In addition to the four programs outlined above, Clemson desires to transition toward a
regional approach to improving health outcomes and equity across the state. Our regional teams (including health extension agents) will focus on serving as a population bridge between hospitals, physician practices, home health agencies, local government, local businesses and other stakeholders—including patients to: A) reduce preventable hospitalization (typically uncontrolled diabetes, controlled hypertension, poorly controlled heart disease), B) reduce cancer mortality, and C) reduce premature death. The regional teams will care for both the insured and uninsured citizens in these regions, operating from referral services that will not harm existing clinicians, hospitals, and other organizations. The regional teams will become embedded in their communities and provide true “gap care” that is not being sufficiently addressed and is currently driving down health outcomes. Reduced preventable hospitalization will be realized through enhanced health services care and patient education related to the prevention and treatment of chronic disease. Reduced cancer mortality will be realized through enhanced cancer screening efforts and targeted prevention strategies. Reduced premature death will be realized through the strategies above and new efforts aimed at avoiding accidental drug overdose and breaking addiction through medical-assisted therapy.

In doing so we seek to improve the health of South Carolina families, which should lead to reduced chronic care Medicaid costs and lead to a healthier workforce that will drive economic growth. The initiative will also complement MUSC efforts in bringing telehealth and expanded health care access into rural areas including some of South Carolina’s largest farms. In FY 2021 we propose launching an Upstate Region Satellite Clinic at Clemson University and Midlands Region Satellite Clinic at Chester (adjacent to hospital). We will plan for and pilot chronic disease initiatives toward a future Pee Dee Region Satellite Clinic at Marion (close to hospital in Mullins).

**Requested recurring funding:**
The funding requested below will support the ongoing operations and regional expansion mission of the Clemson Health Innovation – Extension personnel working collaboratively with MUSC. The budget is outlined below:

- **$800,000** for continued compensation of 8 FTEs for key personnel (Williamsburg, Barnwell, Anderson counties) and mobile efforts, including lifestyle educators/nurse educators, health extension agents, horticulture extension agents, nurse practitioner, and program assistant. These funds also support operating expenses of the mobile health clinics, patient educational materials, and other expenses incurred in the delivery of services.

- **$500,000** for compensation of 6 new FTE personnel to operate from the **Midlands Region Satellite Clinic in Chester County.** Specifically, a Nurse practitioner, a Health Extension Agent, a Registered Dietician, a Registered Nurse Educator, Social Worker, and Medical Office Assistant. Funds only cover personnel costs, not ongoing health extension and clinic expenses (to be funded separately). Initial efforts will be targeted toward Chester County but rapidly expanded into Fairfield County, Lancaster County (Southern part), and Kershaw County. Over time, the initiative will spread across the Midlands.

- In FY 2020-2021, Clemson will collaborate with MUSC to begin planning for (e.g. meetings with stakeholders, identifying future clinic space) and piloting key chronic disease initiatives toward a goal of establishing a **Pee Dee Region**
Satellite Clinic in Marion County. The initial planning effort and pilots will be funded via the existing Clemson FY 2020 legislative funds and other funding via MUSC. Initial efforts will be targeted toward Marion County, Williamsburg County and Florence County but once but rapidly expanded to high-need counties across the Pee Dee when the satellite clinic is established.

- In FY 2020-2021, Clemson will expand its Upstate Region Satellite Clinic at Clemson/Pickens County. The University will leverage existing FY 2020 state legislative funds and reshape its outreach efforts across the Upstate. Initial efforts will be targeted toward Oconee County, rural areas of Pickens County, Anderson County, Cherokee County, and Anderson County. Over time the satellite clinic will cover nearly all high-need counties, or portions of counties across the Upstate.

Note: Our vision is that each South Carolina region would have a satellite clinic “home” for health innovation-extension. The home would have a dedicated clinic space and team, one or more mobile health clinic vans, active telehealth and patient self-monitoring programs, integration with health extension and cooperative extension efforts, advisory teams with local clinicians and the community. The satellite clinics would have collaborative relationships with the local hospitals, physician practices, home health agencies, pharmacies, and others engaged in health care delivery.

Permanent funding for the program will need to be identified to ensure the initiative is a long-term success for the state of South Carolina.

Please thoroughly explain the request to include the justification for funds, potential offsets, matching funds, and method of calculation. Please include any explanation of impact if funds are not received. If new positions have been requested, explain why existing vacancies are not sufficient.
FORM B1 – RECURRING OPERATING REQUEST

**AGENCY PRIORITY** 3

Provide the Agency Priority Ranking from the Executive Summary.

**TITLE** Clemson University - Safety & Security

Provide a brief, descriptive title for this request.

**AMOUNT**

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<th>Source</th>
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What is the net change in requested appropriations for FY 2020-21? This amount should correspond to the total for all funding sources on the Executive Summary.

**NEW POSITIONS** 29.0

Please provide the total number of new positions needed for this request.

**FACTORS ASSOCIATED WITH THE REQUEST**

Mark “X” for all that apply:

- Change in cost of providing current services to existing program audience
- Change in case load/enrollment under existing program guidelines
- Non-mandated change in eligibility/enrollment for existing program
- Non-mandated program change in service levels or areas
- Proposed establishment of a new program or initiative
- Loss of federal or other external financial support for existing program
- Exhaustion of fund balances previously used to support program
- IT Technology/Security related
- Consulted DTO during development
- Related to a Non-Recurring request – If so, Priority #

**STATEWIDE ENTERPRISE STRATEGIC OBJECTIVES**

Mark “X” for primary applicable Statewide Enterprise Strategic Objective:

- Education, Training, and Human Development
- Healthy and Safe Families
- Maintaining Safety, Integrity, and Security
- Public Infrastructure and Economic Development
- Government and Citizens

**ACCOUNTABILITY OF FUNDS**

The funding request for Safety & Security supports the University’s enterprise objectives for Maintaining Safety, Integrity, and Security.

What specific strategy, as outlined in the FY 2019-20 Strategic Planning and Performance Measurement template of agency’s accountability report, does this funding request support? How would this request advance that strategy? How would the use of these funds be evaluated?
The majority of the funds received for this initiative will be used for compensation for new positions such as additional police, fire, and emergency management staffing to expand service levels and grow priority programs as identified by the Board of Trustees and Executive Leadership Team. Clemson University will adhere to state procurement policies and procedures for any acquisition of goods and services with these funds, if necessary.

**Recipients of Funds**

What individuals or entities would receive these funds (contractors, vendors, grantees, individual beneficiaries, etc.)? How would these funds be allocated – using an existing formula, through a competitive process, based upon predetermined eligibility criteria?

Because Clemson is its own municipality, the University must provide police, fire, and EMS services for the campus. Continued investments will allow the University to provide a safe campus conducive to education for Clemson students, faculty, employees, and visitors.

**FTE Request: $2,700,000**

14.0 Police Officer ($1,500,000)
6.0 Fire Safety Officer ($390,000)
2.0 Emergency Preparedness Coordinator ($540,000)
7.0 Video Surveillance Monitoring positions ($270,000)

**Recurring Operational and Maintenance Expenses: $200,000**

- Additional police staffing (14.0 FTEs) is based on population growth on campus and the need to maintain the goal of 2.0 officers to 1,000 student ratios. This staffing level does not include the significant increases in coverage requirements due to additional faculty, staff, facilitates, and special events. The increase in FY 21 continues to build out CUPD based on the 3-year plan approved by the BOT in 2018. The additional support staff is a requirement to reach our goal of two telecommunication officers per shift with the necessary personnel to cover training, leave, and special events. This was identified as a critical staffing need and officer safety requirement during CUPD’s Management Review in 2018.
- Fire Safety Officers (6.0 FTEs) are based on staffing for the new Station 2. The approved schedule for staffing the new station was three (3) new firefighters per year to reach a staff level of 14 FF per shift. The 6 officers in FY20 and FY21 brings the total firefighters for Station 2 hired to 9. Once all firefighters are hired, a minimum staffing of 12FF per shift when accounting for leave, training, and Kelly days can be accomplished. This follows NFPA recommendations and appropriately staffs all apparatus for both Fire and EMS responses. Increased staffing levels become more critical as the University increases its enrollment, adds new facilities, expands the number of special events, and enhances proactive inspection and code enforcement activities.
- Clemson is committed to building a robust Emergency Management function to develop plans, prepare for and mitigate risk, and collaborate with others to respond and recover from planned and unplanned events. The current staffing of a Director and Deputy Director does not allow for the myriad requirements to be accomplished in a timely manner. The emergency management coordinators (2.0 FTEs) are necessary to operationalize the Emergency Operation Center and
all its requirements while also developing plans, delivering training, and conducting exercises to enhance the overall emergency preparedness of the campus. Without these two positions, the goals of the University relating to emergency preparedness will be significantly delayed, and thus, the knowledge and competencies of faculty, staff, and community partners will be impacted. The Emergency Management function has expanded significantly over the last year through the efforts of the new Director. To continue the momentum and create a credible program these additional staff positions are critical.

- To maximize the investment in video and access control systems, an active monitoring capability is being implemented. These staff positions (7.0 FTEs) will provide the capability to provide real time information 24/7 to police and fire responders. They will also allow proactive virtual patrols throughout campus where video exist to prevent and mitigate crime and report in real time to police officers and firefighter’s incident information while enroute to optimize responses. Additionally, Operation Center personnel will be available to research video and access control history immediately to assist officers and firefighters during follow up investigations and supply suspect or victim information without delay.

- Camera maintenance is a necessity to operate an effective video monitoring system. Prior to this funding, repairs were the responsibility of individual owners. That resulted in many cameras being inoperable for extended periods, which places students, staff, faculty, and visitors at greater risks and creates substantial liability for the University. This central repair contract allows cameras to be repaired quickly, thus, minimizing liability exposure and increasing system functionally and productivity. This request is consistent with the ELT’s approval of a centralized video system.

Please thoroughly explain the request to include the justification for funds, potential offsets, matching funds, and method of calculation. Please include any explanation of impact if funds are not received. If new positions have been requested, explain why existing vacancies are not sufficient.
FORM B1 – RECURRING OPERATING REQUEST

AGENCY NAME: Clemson University
AGENCY CODE: H120
SECTION: 14

AGENCY PRIORITY 4
Provide the Agency Priority Ranking from the Executive Summary.

TITLE Clemson University Center for Advanced Manufacturing
Provide a brief, descriptive title for this request.

AMOUNT
General: $3,000,000
Federal:
Other:
Total: $3,000,000
What is the net change in requested appropriations for FY 2020-21? This amount should correspond to the total for all funding sources on the Executive Summary.

NEW POSITIONS 14.0
Please provide the total number of new positions needed for this request.

MARK “X” FOR ALL THAT APPLY:
Change in cost of providing current services to existing program audience
Change in case load/enrollment under existing program guidelines
Non-mandated change in eligibility/enrollment for existing program
Non-mandated program change in service levels or areas
 Proposed establishment of a new program or initiative
Loss of federal or other external financial support for existing program
Exhaustion of fund balances previously used to support program
IT Technology/Security related
Consulted DTO during development
Related to a Non-Recurring request – If so, Priority #

MARK “X” FOR PRIMARY APPLICABLE STATEWIDE ENTERPRISE STRATEGIC OBJECTIVE:
Education, Training, and Human Development
Healthy and Safe Families
Maintaining Safety, Integrity, and Security
Public Infrastructure and Economic Development
Government and Citizens

ACCOUNTABILITY OF FUNDS
The funding request for Clemson University Center for Advanced Manufacturing supports the University’s enterprise objectives for Education, Training and Human Development and Public Infrastructure and Economic Development. This initiative promotes undergraduate student success and supports state goals for educated workforce development. Clemson University Center for Advanced Manufacturing will be a focal point for education, research, partnerships, and engagement with industry to move this new technology to reality benefiting the people of South Carolina.

What specific strategy, as outlined in the FY 2019-20 Strategic Planning and Performance Measurement template of agency’s accountability report, does this funding request support? How would this request advance that strategy? How would the use of these funds be evaluated?
RECIPIENTS OF FUNDS

The majority of funds received for this initiative will be used for program costs, positions and operating costs for existing academic departments responsible for facilitating the success of the program. Clemson University will adhere to state procurement policies and procedures for any acquisition of goods and services with these funds, if necessary.

What individuals or entities would receive these funds (contractors, vendors, grantees, individual beneficiaries, etc.)? How would these funds be allocated – using an existing formula, through a competitive process, based upon predetermined eligibility criteria?

JUSTIFICATION OF REQUEST

Manufacturing is the heart of the South Carolina economy, contributing $35 billion (17%) to the state domestic output and employing 239,500 (11.7%) people. South Carolina exports over $30 billion of products, including competitively exporting over $9 billion to free-trade partners. South Carolina manufactures a diversity of products, connected to supply chains from across the Southeast and shipped through the world class facilities in the port-of Charleston. Manufacturing sectors of significant impact on the South Carolina economy include: Chemicals, Automotive, Aviation/Defense, Materials, Electric Power Systems, and Consumer Goods. These manufacturing sectors require technology innovation for continuing growth and access across the global markets to which they compete.

Clemson University is the premier science and technology oriented public land-grant university in South Carolina. Over the past five years, science and technology excellence at Clemson has been realized through a doubling of research activity, placing Clemson in the top-echelon of research institutions for the nation as measured by the Carnegie-classification. This increase in research productivity by the Clemson faculty and student researchers positions the University to lead in Advanced Manufacturing.

A part of this increase has been the revitalization (and reboot) of the Clemson University Center for Advanced Manufacturing who is a focal point for education, research, partnerships, and engagement with industry to provide the appropriate workforce and move new technology in laboratories to reality making a direct impact on the companies and the people of South Carolina.

As the support of advanced manufacturing is a continuous and recurring need of industries in South Carolina, Clemson requests $3.0 million in recurring funds for Clemson’s Advanced Manufacturing Initiatives. These recurring dollars will be used to support education, research and outreach of tenured, tenure-track, and research faculty as they work directly with the manufacturers of South Carolina. Recurring monies may also be used as matching funds for competitive research and development grants to attract and capture an estimated 4X of competitive federal funds for work with SC industry partners. Recurring funding will be used for the cost of operating the robotics and teaching labs of the Center, which are intended to prepare premier undergraduate and masters programs for leadership roles in advanced manufacturing. Lastly, funds will be used to strengthen SC’s technical workforce by helping change the messaging of technical work, collect meaningful data on this critical segment, leverage federal investments and create new partnerships among various types of educational institutions, all levels of government, and industry. Some recurring funding may also be used to attract and retain world class faculty as well as attracting early-career entrepreneurs to partner with Clemson, thereby attracting early stage investment in the State of SC.

The funding will be used as follows:
$0.5M Technical Workforce Development
  $400k personnel
  $100k partnership grants, travel, supplies, equipment, participant support

$0.8M Education Activities
  $350k teaching faculty/grad student support
  $200k materials, supplies, students’ projects
  $50k third party R&D labs
  $200k facility lease

$1M Research Activities
  $750k federal grant matching for 4x return investment
  $250k attract & retain top research faculty in advanced manufacturing

$0.7M Applied Research/Industrialization & Management Activities
  $250k innovation clinic
  $100k innovation fellowships
  $100k outreach
  $250k administrative functions

Please thoroughly explain the request to include the justification for funds, potential offsets, matching funds, and method of calculation. Please include any explanation of impact if funds are not received. If new positions have been requested, explain why existing vacancies are not sufficient.
FORM B1 – RECURRING OPERATING REQUEST

AGENCY PRIORITY 5
Provide the Agency Priority Ranking from the Executive Summary.

TITLE Other Funds Authorization Increase: E&G Unrestricted Budgets
Provide a brief, descriptive title for this request.

AMOUNT

General:
Federal:
Other: $32,189,973
Total: $32,189,973

What is the net change in requested appropriations for FY 2020-21? This amount should correspond to the total for all funding sources on the Executive Summary.

NEW POSITIONS 70.0
Please provide the total number of new positions needed for this request.

FACTORS ASSOCIATED WITH THE REQUEST
Mark “X” for all that apply:

X Change in cost of providing current services to existing program audience
X Change in case load/enrollment under existing program guidelines
X Non-mandated change in eligibility/enrollment for existing program
X Non-mandated program change in service levels or areas
X New Revenues/Gifts
X Use of Prior Year Balances
Proposed establishment of a new program or initiative
Loss of federal or other external financial support for existing program
Exhaustion of fund balances previously used to support program
IT Technology/Security related
Consulted DTO during development
Related to a Non-Recurring request – If so, Priority #

STATEWIDE ENTERPRISE STRATEGIC OBJECTIVES
Mark “X” for primary applicable Statewide Enterprise Strategic Objective:

X Education, Training, and Human Development
X Healthy and Safe Families
X Maintaining Safety, Integrity, and Security
X Public Infrastructure and Economic Development
X Government and Citizens

ACCOUNTABILITY OF FUNDS
This request is for a change to spending authorization for Education and General Other Earmarked Funds which are generated by the University and provide support for all of the University’s objectives in the Accountability Report.

What specific strategy, as outlined in the FY 2019-20 Strategic Planning and Performance Measurement template of agency’s accountability report, does this funding request support? How would this request advance that strategy? How would the use of these funds be evaluated?
These earmarked funds will be used to provide instructional salaries and fringe benefits, contractual startup commitments for faculty, investments in labs, classrooms, and other planned maintenance projects and capital investments, continuation of undergraduate creative inquiry programs, and research incentives for faculty. The additional budget authorization will provide funding for new FTEs for positions to support student progress, engagement, success and retention, strategic research areas, life safety and security, academic support, and mission critical systems. The budget increase will also provide funding for the University’s rising mandatory costs, such as employee fringe benefits, including significant increases for retirement and health insurance, property and liability insurance, legal costs, cost of materials, and utility costs. Clemson University will adhere to state procurement policies and procedures for any acquisition of goods and services with these funds.

**RECIPIENTS OF FUNDS**

What individuals or entities would receive these funds (contractors, vendors, grantees, individual beneficiaries, etc.)? How would these funds be allocated – using an existing formula, through a competitive process, based upon predetermined eligibility criteria?

Clemson University is requesting an increase to its spending authority for Other Earmarked Funds based on a projection of E&G Unrestricted revenues and prior year balances. Contributing factors to the increase in the I.A E&G Unrestricted Budget for Other Earmarked Funds include the following:

- increased enrollment
- a projection (based on trend data) of modest increases to student fees, including online, distance education, and summer school programs
- the hire of 70.0 new FTE positions for the following:
  - 12 Development positions for positions related to capital campaign.
  - 13 Facilities positions primarily landscape, maintenance and custodial services for the new School of Business building as well as additional staff needed for campus expansion.
  - 12 faculty and staff for the growth of the various departments within the College of Agriculture: Packaging, Ag Education Program, etc.
  - 1 nursing position to support the expansion of the nursing program.
  - 5 positions to support the College of Business and College of Science: student services program coordinators – expand offering to student programming/move to an Academic Advising Model and lab technologist.
  - 3 academic support reference positions for the Digital Humanities, Diversity Archivist, and University Historian
  - 5 faculty positions to support the growth in enrollment for the College of Architecture
  - 9 positions to support the ClemsonForward Research submission and expenditure targets and increased research productivity, diversity and retention initiatives for College of Engineering, Computing and Applied Science.
  - 4 positions to support University Admissions – Regional Recruiters and CRM Specialist
  - 3 positions for Safety, Risk, & Compliance: IT Auditor, ERM Director and Enterprise Environmental Health and Safety
  - 1 position – Assistant General Counsel
  - 1 position for project manager staff to facilitate LEAN process improvement efforts across campus.

**JUSTIFICATION OF REQUEST**
1 position for the Rutland Institute for Ethics

- rising mandatory costs such as employee fringe benefits including retirement and health insurance, salary increases or bonuses, potential impacts from federal regulations, property and liability insurance, legal costs, cost of materials, and utility costs
- an anticipated use of prior year balances, which include one-time costs associated with the following:
  - contractual startup commitments for faculty
  - investments in labs, classrooms and other planned maintenance projects and capital investments
  - continuation of undergraduate creative inquiry programs
  - research incentives for faculty
  - the non-cash impact of the net pension liability “expense” required by GASB 68

This growth supports the University’s strategic priorities:

- Research: to foster a rich, curiosity-driven intellectual environment; to solve real problems; and to create more opportunities for graduates and alumni
- Engagement: to capitalize on existing strengths and opportunities to emphasize high-impact, evidence-based academic and global engagement
- Academic Core: create an optimal path for academic programs — both undergraduate and graduate — to achieve national prominence
- Living: strengthen the cherished sense of community and connectedness that defines the Clemson Family by creating an environment that is diverse, respectful and inclusive, further enhancing the quality of student life and developing policies, facilities and support systems that will make Clemson a great place to work, study and live

The University (H120) currently has 508.2 vacant FTEs, of which 215.2 are in the recruitment process and 78.5 were recently received from the State for hiring in FY20. The remaining 214.5 FTEs are being evaluated for recruitment and refill. This leaves Clemson with only 6.0% of its total FTE authorization available for new positions.

Please thoroughly explain the request to include the justification for funds, potential offsets, matching funds, and method of calculation. Please include any explanation of impact if funds are not received. If new positions have been requested, explain why existing vacancies are not sufficient.
**FORM B1 – RECURRING OPERATING REQUEST**

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<th>AGENCY PRIORITY</th>
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<td><strong>Provide the Agency Priority Ranking from the Executive Summary.</strong></td>
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<th>TITLE</th>
<th>Other Funds Authorization Increase: E&amp;G Restricted Budgets</th>
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<td><strong>Provide a brief, descriptive title for this request.</strong></td>
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<td>Federal:</td>
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<td>Other:</td>
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<td><strong>What is the net change in requested appropriations for FY 2020-21? This amount should correspond to the total for all funding sources on the Executive Summary.</strong></td>
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<tr>
<th>NEW POSITIONS</th>
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<tr>
<td><strong>Please provide the total number of new positions needed for this request.</strong></td>
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</table>

**FACTORS ASSOCIATED WITH THE REQUEST**

Mark “X” for all that apply:

- [X] Change in cost of providing current services to existing program audience
- [X] Change in case load/enrollment under existing program guidelines
- Non-mandated change in eligibility/enrollment for existing program
- Non-mandated program change in service levels or areas
- New Revenues/Gifts
- Use of Prior Year Balances
- Proposed establishment of a new program or initiative
- Loss of federal or other external financial support for existing program
- Exhaustion of fund balances previously used to support program
- IT Technology/Security related
- Consulted DTO during development
- Related to a Non-Recurring request – If so, Priority #

**STATEWIDE ENTERPRISE STRATEGIC OBJECTIVES**

Mark “X” for primary applicable Statewide Enterprise Strategic Objective:

- [X] Education, Training, and Human Development
- Healthy and Safe Families
- Maintaining Safety, Integrity, and Security
- Public Infrastructure and Economic Development
- Government and Citizens

**ACCOUNTABILITY OF FUNDS**

This request is for a change to spending authorization for Restricted Other Earmarked Funds which are generated by the University in support of Education, Training, and Human Development, as well as Public Infrastructure and Economic Development.

*What specific strategy, as outlined in the FY 2019-20 Strategic Planning and Performance Measurement template of agency’s accountability report, does this funding request support? How would this request advance that strategy? How would the use of these funds be evaluated?*
**AGENCY NAME:** Clemson University  
**AGENCY CODE:** H120  
**SECTION:** 14

| RECIPIENTS OF FUNDS | These Other Restricted Funds will be used as required by contracts and endowment agreements. Clemson University will adhere to state procurement policies and procedures for any acquisition of goods and services with these funds. |

*What individuals or entities would receive these funds (contractors, vendors, grantees, individual beneficiaries, etc.)? How would these funds be allocated – using an existing formula, through a competitive process, based upon predetermined eligibility criteria?*

| JUSTIFICATION OF REQUEST | Clemson University is requesting an increase to its Restricted Other Funds Budget. This growth is attributed primarily to projected increases in funding for SC Palmetto Fellows and privately funded scholarships. |

*Please thoroughly explain the request to include the justification for funds, potential offsets, matching funds, and method of calculation. Please include any explanation of impact if funds are not received. If new positions have been requested, explain why existing vacancies are not sufficient.*
**AGENCY NAME:** Clemson University  
**AGENCY CODE:** H120  
**SECTION:** 14

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## FORM B1 – RECURRING OPERATING REQUEST

### AGENCY PRIORITY

7  
*Provide the Agency Priority Ranking from the Executive Summary.*

### TITLE

Other Funds Authorization Increase: Auxiliary Enterprises Budgets  
*Provide a brief, descriptive title for this request.*

### AMOUNT

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<th>Category</th>
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<tr>
<td>Federal</td>
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</tr>
<tr>
<td>Other</td>
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<td><strong>$15,863,308</strong></td>
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*What is the net change in requested appropriations for FY 2020-21? This amount should correspond to the total for all funding sources on the Executive Summary.*

### NEW POSITIONS

10.0  
*Please provide the total number of new positions needed for this request.*

### FACTORS ASSOCIATED WITH THE REQUEST

Mark “X” for all that apply:

- [X] Change in cost of providing current services to existing program audience  
- Change in case load/enrollment under existing program guidelines  
- Non-mandated change in eligibility/enrollment for existing program  
- Non-mandated program change in service levels or areas  
- [X] New Revenues/Gifts  
- [X] Use of Prior Year Balances  
- Proposed establishment of a new program or initiative  
- Loss of federal or other external financial support for existing program  
- Exhaustion of fund balances previously used to support program  
- IT Technology/Security related  
- Consulted DTO during development  
- Related to a Non-Recurring request – If so, Priority # __________

### STATEWIDE ENTERPRISE STRATEGIC OBJECTIVES

Mark “X” for primary applicable Statewide Enterprise Strategic Objective:

- [X] Education, Training, and Human Development  
- Healthy and Safe Families  
- Maintaining Safety, Integrity, and Security  
- Public Infrastructure and Economic Development  
- Government and Citizens

### ACCOUNTABILITY OF FUNDS

This request is for a change to spending authorization for Auxiliary Other Earmarked Funds which are generated by the University’s auxiliary enterprises in support of Education, Training, and Human Development.  
*What specific strategy, as outlined in the FY 2019-20 Strategy Planning and Performance Measurement template of agency’s accountability report, does this funding request support? How would this request advance that strategy? How would the use of these funds be evaluated?*
**RECIPIENTS OF FUNDS**

Clemson University will adhere to state procurement policies and procedures for any acquisition of goods and services with these funds.

What individuals or entities would receive these funds (contractors, vendors, grantees, individual beneficiaries, etc.)? How would these funds be allocated – using an existing formula, through a competitive process, based upon predetermined eligibility criteria?

**JUSTIFICATION OF REQUEST**

Clemson University is requesting an increase to its Earmarked Other Funds Budget for Auxiliary Enterprises. This growth is primarily attributed to the following: $8.2M increase in Athletic revenues for ticket sales, conference distribution, bowl games, corporate sponsorships, and scholarships; $4.3M growth in Housing and Dining; $2.1M growth for ISD (Medicaid Contract); $0.5M for Parking Services permit sales; and $0.4M for spending of prior year balances for improvements. Additional spending authority is necessary to fulfill contractual obligations and to provide students with high quality facilities.

The impact of the growth in auxiliary enterprises is anticipated to necessitate the hire of 10 additional FTEs:

- 10 positions within Athletics – Assistant Directors for IPTAY/Volunteer Engagement; Senior Associate Director of IPTAY/Internal Operations; 2 Assistant Director of IPTAY/Annual Fund Gift Officers; Major Gift Development Officer/IPTAY; 2 Administrative Assistants for Internal Operations and Development and 3 Sales and Service Consultants.

Please thoroughly explain the request to include the justification for funds, potential offsets, matching funds, and method of calculation. Please include any explanation of impact if funds are not received. If new positions have been requested, explain why existing vacancies are not sufficient.
**FORM B1 – RECURRING OPERATING REQUEST**

**AGENCY NAME:** Clemson University  
**AGENCY CODE:** H120  
**SECTION:** 14

**AGENCY PRIORITY:** 8  
*Provide the Agency Priority Ranking from the Executive Summary.*

**TITLE:** Federal Funds Authorization Increase: E&G Restricted Budgets  
*Provide a brief, descriptive title for this request.*

<table>
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<th>AMOUNT</th>
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| **General:**  
Federal: $4,426,265  
Other:  
**Total:** $4,426,265 |

*What is the net change in requested appropriations for FY 2020-21? This amount should correspond to the total for all funding sources on the Executive Summary.*

**NEW POSITIONS:** 0  
*Please provide the total number of new positions needed for this request.*

**FACTORS ASSOCIATED WITH THE REQUEST**

Mark “X” for all that apply:

- Change in cost of providing current services to existing program audience  
- Change in case load/enrollment under existing program guidelines  
- Non-mandated change in eligibility/enrollment for existing program  
- Non-mandated program change in service levels or areas  
- New Revenues/Gifts  
- Use of Prior Year Balances  
- Proposed establishment of a new program or initiative  
- Loss of federal or other external financial support for existing program  
- Exhaustion of fund balances previously used to support program  
- IT Technology/Security related  
- Consulted DTO during development  
- Related to a Non-Recurring request – If so, Priority #

**STATEWIDE ENTERPRISE STRATEGIC OBJECTIVES**

Mark “X” for primary applicable Statewide Enterprise Strategic Objective:

- Education, Training, and Human Development  
- Healthy and Safe Families  
- Maintaining Safety, Integrity, and Security  
- Public Infrastructure and Economic Development  
- Government and Citizens
ACCOUNTABILITY OF FUNDS

The change in spending authorization for Federal grants and contracts will allow the University to advance within the Public Infrastructure and Economic Development objective. The University seeks to increase its sponsored program research expenditures in support of this goal, and additional spending authority is crucial to meeting contractual obligations. This request also impacts the Education, Training, and Human Development objective and includes a modest increase for Federal scholarship programs.

What specific strategy, as outlined in the FY 2019-20 Strategic Planning and Performance Measurement template of agency’s accountability report, does this funding request support? How would this request advance that strategy? How would the use of these funds be evaluated?

RECIPIENTS OF FUNDS

This request is for increased spending authority for growth in Federally sponsored research as well as the impact of Federal scholarship programs. These Federal Restricted Funds will be used as required by contracts and agreements. Clemson University will adhere to state procurement policies and procedures for any acquisition of goods and services with these funds.

What individuals or entities would receive these funds (contractors, vendors, grantees, individual beneficiaries, etc.)? How would these funds be allocated – using an existing formula, through a competitive process, based upon predetermined eligibility criteria?

JUSTIFICATION OF REQUEST

As a result of anticipated growth in Federally sponsored research, Clemson University is requesting an increase to its Federal Restricted Funds Budget. Faculty have been extremely successful with new awards in this highly competitive environment, especially with the National Science Foundation and Department of Transportation. Additional spending authority is crucial to meeting contractual obligations. This request also includes modest growth in Federal scholarship programs, primarily for PELL and SEOG Scholarships.

Please thoroughly explain the request to include the justification for funds, potential offsets, matching funds, and method of calculation. Please include any explanation of impact if funds are not received. If new positions have been requested, explain why existing vacancies are not sufficient.
**FORM B1 – RECURRING OPERATING REQUEST**

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<th>AGENCY NAME:</th>
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<td>SECTION:</td>
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**AGENCY PRIORITY** 9

Provide the Agency Priority Ranking from the Executive Summary.

<table>
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<th>TITLE</th>
<th>Federal Funds Authorization Increase: E&amp;G Unrestricted Budgets</th>
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<th>AMOUNT</th>
<th>General: Federal: $2,504,320</th>
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<td>Other: Total: $2,504,320</td>
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What is the net change in requested appropriations for FY 2020-21? This amount should correspond to the total for all funding sources on the Executive Summary.

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<th>NEW POSITIONS</th>
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<td>Please provide the total number of new positions needed for this request.</td>
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**FACTORS ASSOCIATED WITH THE REQUEST**

Mark “X” for all that apply:

- Change in cost of providing current services to existing program audience
- Change in case load/enrollment under existing program guidelines
- Non-mandated change in eligibility/enrollment for existing program
- Non-mandated program change in service levels or areas
- New Revenues/Gifts
- Use of Prior Year Balances
- Proposed establishment of a new program or initiative
- Loss of federal or other external financial support for existing program
- Exhaustion of fund balances previously used to support program
- IT Technology/Security related
- Consulted DTO during development
- Related to a Non-Recurring request – If so, Priority # __________

**STATEWIDE ENTERPRISE STRATEGIC OBJECTIVES**

Mark “X” for primary applicable Statewide Enterprise Strategic Objective:

- Education, Training, and Human Development
- Healthy and Safe Families
- Maintaining Safety, Integrity, and Security
- X Public Infrastructure and Economic Development
- Government and Citizens

**ACCOUNTABILITY OF FUNDS**

The change in spending authorization for indirect cost recoveries from Federally sponsored programs contributes to the University’s advancement within the Public Infrastructure and Economic Development objective.

What specific strategy, as outlined in the FY 2019-20 Strategic Planning and Performance Measurement template of agency’s accountability report, does this funding request support? How would this request advance that strategy? How would the use of these funds be evaluated?
<table>
<thead>
<tr>
<th><strong>RECIPIENTS OF FUNDS</strong></th>
<th>Clemson University will adhere to state procurement policies and procedures for any acquisition of goods and services with these funds.</th>
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<td></td>
<td><em>What individuals or entities would receive these funds (contractors, vendors, grantees, individual beneficiaries, etc.)? How would these funds be allocated – using an existing formula, through a competitive process, based upon predetermined eligibility criteria?</em></td>
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<tr>
<th><strong>JUSTIFICATION OF REQUEST</strong></th>
<th>As a result of anticipated growth in Federally sponsored research, Clemson University is requesting an increase to its Federal Unrestricted Budget for indirect cost recoveries from grants and contracts. These recoveries are used by the University and colleges to support core research facilities and investments in research faculty.</th>
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<tr>
<td></td>
<td><em>Please thoroughly explain the request to include the justification for funds, potential offsets, matching funds, and method of calculation. Please include any explanation of impact if funds are not received. If new positions have been requested, explain why existing vacancies are not sufficient.</em></td>
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FORM C – CAPITAL REQUEST

AGENCY NAME: Clemson University
AGENCY CODE: H120
SECTION: 14

AGENCY PRIORITY
10
Provide the Agency Priority Ranking from the Executive Summary.

TITLE
E&G Planned Maintenance and Renewal Projects
Provide a brief, descriptive title for this request.

AMOUNT
$25,500,000
How much is requested for this project in FY 2020-21? This amount should correspond to the total for all funding sources on the Executive Summary.

CPIP PRIORITY
This request is for funding to accomplish a portfolio of smaller projects that would not necessarily be considered capital projects and require CPIP submission. When bundled together, which enables more efficient procurement and delivery, the aggregate project amount becomes a capital project.

Identify the project’s CPIP plan year and priority number, along with the first year in which the project was included in the agency’s CPIP. If not included in the agency’s CPIP, please provide an explanation. If the project involves a request for appropriated state funding, briefly describe the agency’s contingency plan in the event that state funding is not made available in the amount requested.

OTHER APPROVALS
N/A. The projects specifically have not been approved by the University’s Board of Trustees, however the funding necessary to accomplish these projects was a component of the University’s FY21 budget, which was approved in July. If funded, these projects would not require JBRC/SFAA approval.

What approvals have already been obtained? Are there additional approvals that must be secured in order for the project to succeed? (Institutional board, JBRC, SFAA, etc.)

LONG-TERM PLANNING AND SUSTAINABILITY
The University conducts thorough long-term planning for both capital projects and ongoing minor renovation and renewal projects. The sustainability of the University’s plans and approach is evident in the fact that the University cash funded more than $200 million on E&G asset stewardship and reinvestment over the least 5 years. The University has conducted a system-by-system review for every E&G building and developed a 10-year $160 million long-term renovation and renewal plan. The projects that would be funded through this request are high-priority projects.

To date, The University has not spent any funds specifically to study these projects. These projects have been identified through a thorough review of each building system on campus. No additional capital or operating funds will be requested for this project.

What other funds have already been invested in this project (source/type, amount, timeframe)? Will other capital and/or operating funds for this project be requested in the future? If so, how much, and in which fiscal years? Has a source for those funds been identified/secured? What is the agency’s expectation with regard to additional annual costs or savings associated with this capital improvement? What source of funds will be impacted by those costs or savings? What is the expected useful life of the capital improvement?
The University is requesting $25,505,000 in non-recurring capital funding to fund planned maintenance and reinvestment projects for E&G facilities. The projects include 14 HVAC upgrade or replacements totaling an estimated $12,390,000, 10 roof replacements totaling $2,525,000, 6 building envelope repair projects totaling $1,815,000 and 7 code upgrade and fire protection projects totaling $8,775,000.

These projects were identified by University as high-priority planned maintenance projects through a system-by-system inventory of every E&G building on campus and are part of the University’s 10-year renovation and renewal plan.

By funding these projects, the State will enable the University to accelerate their implementation and bundle for procurement and mobilization efficiencies. The University anticipates that accelerating and bundling these projects would result in approximately $5 million in savings.

Of the $25.5 million, almost half ($12.4 million) are HVAC replacement or upgrades. The University further expects approximately $150,000 in annual operational savings from replacing these units. While the upgrades and replacements are more energy efficient, the efficiency gains will be offset by the need to incorporate outside air into the HVAC system. While this has an offsetting effect on operational savings, it is necessary for code compliance and will improve indoor air quality for the students, faculty, and staff that occupy these buildings.

Provide a summary of the project and explain why it is necessary. Please refer to the budget guidelines for appropriate questions and thoroughly answer all related items.
**FORM D – PROVISO REVISION REQUEST**

<table>
<thead>
<tr>
<th><strong>NUMBER</strong></th>
<th>New</th>
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<tbody>
<tr>
<td>Cite the proviso according to the renumbered list for FY 2020-21 (or mark “NEW”).</td>
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</table>

<table>
<thead>
<tr>
<th><strong>TITLE</strong></th>
<th>Higher Education Repair and Renovation Fund</th>
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<tbody>
<tr>
<td>Provide the title from the FY 2019-20 Appropriations Act or suggest a short title for any new request.</td>
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</table>

<table>
<thead>
<tr>
<th><strong>BUDGET PROGRAM</strong></th>
<th>N/A</th>
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<tbody>
<tr>
<td>Identify the associated budget program(s) by name and budget section.</td>
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<table>
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<tr>
<th><strong>RELATED BUDGET REQUEST</strong></th>
<th>E&amp;G Planned Maintenance and Renewal Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is this request associated with a budget request you have submitted for FY 2020-21? If so, cite it here.</td>
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<tr>
<th><strong>REQUESTED ACTION</strong></th>
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<td>Choose from: Add, Delete, Amend, or Codify.</td>
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<tr>
<th><strong>OTHER AGENCIES AFFECTED</strong></th>
<th>All of the state’s 33 public colleges and universities (including technical colleges) would benefit from adoption of this proviso.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which other agencies would be affected by the recommended action? How?</td>
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</tbody>
</table>

**SUMMARY & EXPLANATION**

Clemson University supports the creation of a statewide dedicated “Higher Education Repair and Renovation Fund” that would provide the state’s 33 public colleges and universities a modest but predictable source of recurring state funding to be utilized for the exclusive purpose of maintaining (through repair and renovation – not new construction) college and university education related facilities. Facilities on college campuses are, in fact, state taxpayer assets that require routine maintenance and periodic repair and renovation to properly maintain. According to the Commission on Higher Education’s latest building condition survey, the state’s 33 public college and universities have a combined $1.6 Billion of estimated “maintenance needs”. As state taxpayer assets, reliable investment by the state in support of proper upkeep of existing college and university facilities (i.e. “state”) is a wise use of state resources and will help mitigate the need for diverting a greater share of student tuition dollars from core missions to facility upkeep which is otherwise necessary in the absence of reliable state investment in college infrastructure. Since 2001, state funding dedicated to maintaining college facilities, while appreciated when provided, has been unreliable. Specifically, there has been no Capital Bond Bill for higher education since 2001 and in 7 state budgets between FY02 and FY19, there were no Capital Reserve Fund appropriations for college facilities. Creation of a dedicated state account to be managed by the Commission on Higher Education (with cooperation from the Council of College Presidents) to be funded reliably from a fund source(s) determined most appropriate by state policymakers (as an example, the HEOA legislation identifies “excess debt service” as a possible source) would help maintain important state assets while helping to mitigate the level of tuition increases otherwise necessary to fund maintenance on the state’s
college and university campuses.

Summarize the existing proviso. If requesting a new proviso, describe the current state of affairs without it. Explain the need for your requested action. For deletion requests due to recent codification, please identify SC Code section where language now appears.

The fiscal impact to the state would be dependent upon the funding received. However, using Clemson’s FY21 Capital Submission as an example, the University estimates that $25.5 million in non-recurring appropriations for planned maintenance projects would result in approximately $5mm, or roughly 20% of the amount funded, in savings due to construction escalation avoidance and bundling savings.

Funding provided for planned maintenance, repair and renovation would also decrease the amount that these projects would need to be funded with available resources of the Universities and further mitigate tuition for in-state students while providing appropriate educational infrastructure.

Provide estimates of any fiscal impacts associated with this proviso, whether for state, federal, or other funds. Explain the method of calculation.

For the current fiscal year, there is established the Higher Education Facilities Repair and Renovation Fund to be administered by the Commission on Higher Education pursuant to the requirements of this provision. On or before October thirty-first of the current fiscal year, of the funds appropriated to the Higher Education Facilities Repair and Renovation Fund, the commission shall transfer twenty percent to the State Board for Technical and Comprehensive Education for distribution among the State's public technical colleges in a manner the board adopts and the remaining eighty percent must be distributed by the commission to each of the state's remaining public research, comprehensive and two-year branch campuses of the University of South Carolina based on a formula developed by the commission's Finance and Facilities Committee in cooperation with the Council of Presidents. At minimum, the committee and council's formula shall take into consideration an institution's total number of buildings by type, size (as measured by square footage) and age compared to the total number of buildings by type, size (as measured by square footage) and age among all public research, comprehensive and two-year branch campuses of the University of South Carolina.

The funds shall only be expended for necessary renovation, repair, and related maintenance, and other critical equipment and system repair and maintenance that are necessary for the safe and efficient operation of the institution's physical plant in its support of the institution's educational purpose. Funds shall not be used for new construction.

Paste FY 2019-20 text above, then bold and underline insertions and strikethrough deletions. For new proviso requests, enter requested text above.
FORM D – PROVISO REVISION REQUEST

NUMBER
New
Cite the proviso according to the renumbered list for FY 2020-21 (or mark “NEW”).

TITLE
Permanent Improvement Project Thresholds
Provide the title from the FY 2019-20 Appropriations Act or suggest a short title for any new request.

BUDGET PROGRAM
N/A
Identify the associated budget program(s) by name and budget section.

RELATED BUDGET REQUEST
N/A
Is this request associated with a budget request you have submitted for FY 2020-21? If so, cite it here.

REQUESTED ACTION
Add
Choose from: Add, Delete, Amend, or Codify.

OTHER AGENCIES AFFECTED
All public colleges and universities (including technical colleges) would benefit from adoption of this proviso.
Which other agencies would be affected by the recommended action? How?

SUMMARY & EXPLANATION
This proviso would provide colleges and universities a measure of modest but meaningful regulatory relief by increasing the state’s fixed “permanent improvement project” (PIP) dollar threshold that currently triggers the state’s multi-phased, eight-step (BOT, CHE, JBRC, and SFAA x2 (Phases 1 and 2)) approval process before execution of a college or university’s project can commence. By increasing the threshold for PIP projects from $1M to $5M for research universities and from $1M to $2M for all other public institutions of higher learning including technical colleges, smaller more routine capital and other PIPs can be undertaken in a more timely and cost effective manner, while larger more costly projects would continue to undergo the state’s multi-phased, eight-step approval process. Note that since 2011 (the last time the PIP thresholds were raised), construction prices have increased by 40% (according to the Turner Building Cost Index) resulting in an erosion of the value of the state’s current PIP threshold. Importantly, this proviso would require a college or university’s duly elected governing board to approve projects falling within these revised thresholds by public vote in open session. Additionally, projects approved pursuant to this proviso would require annual reporting to the Governor, CHE, JBRC and SFAA. Adoption of this proviso would have no fiscal impact on the General Fund or state budget, while providing institutions of higher learning meaningful process relief with proper oversight and reporting ensured.

Summarize the existing proviso. If requesting a new proviso, describe the current state of affairs without it. Explain the need for your requested action. For deletion requests due to recent codification, please identify SC Code section where language now appears.
| **FISCAL IMPACT** | The fiscal impact to the state would be dependent on the activity of annual projects. However, raising the thresholds would enable the University to bundle minor (non-PIP) renovation and renewal projects to achieve economies of scale in procurement and delivery. Avoiding the PIP process for these projects would also accelerate their delivery, avoiding construction escalation. Using Clemson’s FY21 Capital Submission as an example, the University estimates that $25.5 million in non-recurring appropriations for planned maintenance projects would result in approximately $5mm, or roughly 20% of the project amounts, in savings due to construction escalation avoidance and bundling savings. These anticipated savings would come at no cost to the State. Provide estimates of any fiscal impacts associated with this proviso, whether for state, federal, or other funds. Explain the method of calculation. |
| **PROPOSED PROVISO TEXT** | For the current fiscal year, permanent improvement projects as defined in Title 2, Chapter 47 of the Code of Laws where the cost is at least one million dollars but no greater than five million dollars for public research universities and not greater than two million dollars for all other public institutions of higher learning are exempt from the requirements of Section 2-47-50 except that a project shall not be considered approved without an institution’s governing board having first voted to approve the project in public session. Institutions shall provide a report of projects approved by their governing boards pursuant to this provision to the Chairmen of the Commission on Higher Education, the Joint Bond Review Committee, and the State Fiscal Accountability Authority by September thirtieth of the current fiscal year. Paste FY 2019-20 text above, then bold and underline insertions and strikethrough deletions. For new proviso requests, enter requested text above. |
## Title
Agency Cost Savings and General Fund Reduction Contingency Plan

## Amount
$2,858,465

*What is the General Fund 3% reduction amount (minimum based on the FY 2019-20 recurring appropriations)? This amount should correspond to the reduction spreadsheet prepared by EBO.*

## Associated FTE Reductions
N/A

*How many FTEs would be reduced in association with this General Fund reduction?*

## Program/Activity Impact
Clemson University’s General Funds Appropriations primarily support Education and General instructional activity, preparing undergraduate and graduate students with the knowledge and skills that they need to complete their degrees and prepare for life-long learning. This program includes funding for student internships, academic advising and support. Economic development and research activities are also supported by General Funds Appropriations, such as the Center for Energy Systems, Clemson Center for Human Genetics, and Clemson University International Center for Automotive Research (CUICAR).

*What programs or activities are supported by the General Funds identified?*

## Summary
While elimination of positions is generally not the preferred solution, a reduction in general funds of this magnitude would force Clemson to consider reductions in the positions funded by general funds. Clemson would work with the state to attempt to implement early retirement programs and other voluntary separation alternatives to minimize the negative impact to individuals or families. At the same time, the University will continue its efforts to aggressively develop alternative revenue sources, expand partnerships with industry and the private sector for funding, and to continue its successful and longstanding work to be as lean as possible and reduce operating costs per unit of output.

Since it will take some time to evaluate options, such as early retirement and voluntary separation plans, for reduction in state appropriations, the budget would reflect a decrease to the Other Operating Expenses category within the I.A Unrestricted E&G budget.

The general fund reduction amount was calculated by the Executive Budget Office as 3% of Clemson’s FY 2019-20 Revised Base General Fund Appropriations ($95,282,172).

*Please provide a detailed summary of service delivery impact caused by a reduction in General Fund Appropriations and provide the method of calculation for anticipated reductions. Agencies should prioritize reduction in expenditures that have the least significant impact on service delivery.*
Clemson University is committed to providing a high quality, affordable education to the residents of South Carolina and as such, promotes a culture of continuous improvement to encourage the efficient utilization of resources. Clemson engages in ongoing internal analysis and review of University processes, focusing on providing increased efficiencies, cost savings, labor reallocations, and enhanced quality at both the University and departmental level. Clemson’s continuous analysis involves employees from all areas of the University, including the Finance Division, Provost Office, Student Affairs, Computing and Information Technology, and academic colleges.

Several mechanisms have been utilized to implement operational efficiencies, enhance effectiveness and consistency, increase accountability and reduce redundancy across the University. In 2012, Clemson showed its’ dedication to creating efficient processes through the development of a centralized group focused on continuous improvement, now known as the Lean Office. Lean focuses on evaluating processes from the customer perspective and the Lean Office strives to create a culture of continuous improvement that encourages the elimination of waste and non-value-added activity, increases efficiency, generates revenue, and implements best business practices across the University. Lean involves finding and solving root causes to problems and provides a standard set of “tools” or methods to execute the various stages of the improvement process, making improvement a regular and standardized part of the everyday work environment.

The Lean Office has implemented a formalized Lean facilitator and Lean leader training program with the support of an external consultant, which develops Lean leaders campus-wide. Through this program, each key functional area has dedicated Lean leaders, who are responsible for identifying improvement opportunities, conducting value stream mapping and kaizen events, and implementing efficiency solutions based on data-driven analysis. These facilitators are also responsible for training employees in their area on Lean principles and practices, thus empowering employees to proactively seek opportunities to improve processes and business practices, resulting in more efficient resource utilization. The Lean Office also works in tandem with the Enterprise Risk Management team to identify and implement opportunities to mitigate risk while also discovering processes that are overregulated.

As a result of these internal and external engagements over the past several years, numerous recommendations have been implemented, resulting in enhanced efficiencies, improved quality, and realized time and cost savings.

The University strives to be good stewards of our resources. For example, this past fiscal year, our Business Services Team generated $18.6M in documented savings through strategic outsourcing, aggressive negotiations with vendors, and the use of our e-procurement system. These savings will allow the University to make additional investments in the ClemsonForward Plan.

What measures does the agency plan to implement to reduce its costs and operating expenses by more than $50,000? Provide a summary of the measures taken and the estimated amount of savings. How does the agency plan to repurpose the savings?
**Lean in Higher Education:**
Lean focuses on the elimination of waste and improving customer service. Lean involves finding and solving root causes to problems, measuring the system before and after the solution to prove that improvement has occurred and continuing to look for ways to improve. It also provides a standard set of “tools” or methods to execute the various stages of the improvement process, making improvement a regular and standardized part of the every-day work environment. Although Lean practices originated in manufacturing, they have gained popularity in the service industries as organizations have found value in these techniques to reduce costs and enhance the customer experience.

provide a brief, descriptive title for this request.

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As a result of these internal and external engagements over the past several years,
numerous recommendations have been implemented, resulting in enhanced efficiencies, improved quality, and realized time and cost savings. Examples include:

- Through the use of 5 kaizen boards, CCIT completed 9 process improvements during FY19 which resulted in over 5,700 hours of process time saved.

- Process improvements in Facilities resulted in close to 3,000 hours of process time saved, including the elimination of 1 FTE position. An annualized savings of over $46,000 was realized.

- Undergraduate Admissions was able to reallocate over 1,000 hours of process time by evaluating and streamlining 10 processes.

- Through leveraging purchase contracts for external job postings, the Office of Human Resources has realized a savings of $228,000 for FY2019 and an estimated savings of $1,455,000 over the life of the contracts.

What is the expected savings to South Carolina’s businesses and citizens that is generated by this proposal? The savings could be related to time or money.

**Factors Associated with the Request**

Mark “X” for all that apply:

- Repeal or revision of regulations.
- Reduction of agency fees or fines to businesses or citizens.
- **X** Greater efficiency in agency services or reduction in compliance burden.
- **X** Other

**Method of Calculation**

Clemson engages in ongoing internal analysis and review of University processes, focusing on providing increased efficiencies, cost savings, labor reallocations, and enhanced quality at both the University and departmental level. Metrics often measured include process time, lead time and percentage complete and accurate (a metric measuring overall quality of the process).

Describe the method of calculation for determining the expected cost or time savings to businesses or citizens.

**Reduction of Fees or Fines**

The University ensures that fines and fees are reasonable with processes in place to annually review and audit business plans and fee/fine calculations. The Controller’s Office reviews service center rates across campus for reasonability, and the student fee committee reviews fee proposals to determine if other funding alternatives exist rather than passing the cost to the student with a new fee or fee increase. The fee committee communicates with student government leaders and ensures that they have a voice in the process before executive leadership considers the fee proposals.

Which fees or fines does the agency intend to reduce? What was the fine or fee revenue for the previous fiscal year? What was the associated program expenditure for the previous fiscal year? What is the enabling authority for the issuance of the fee or fine?

**Reduction of Regulation**

As part of the Value Stream Mapping conducted at Clemson, teams identify and evaluate regulations, policies and procedures that do not provide value to the process and the customer. Mechanisms to eliminate or adjust these policies or regulations are identified and implemented to ensure Clemson continues its’ focus on efficient and effective processes.

Which regulations does the agency intend to amend or delete? What is the enabling authority for the regulation?
Clemson University is committed to providing a high quality, affordable education to the residents of South Carolina and as such, promotes a culture of continuous improvement to encourage the efficient utilization of resources.

Through the use of Lean, Clemson has conducted over 75 Value Stream Mapping events, trained over 600 employees in how to identify and eliminate waste in processes and continues to focus on growing the program across all Divisions.

The intent of Lean is to eliminate and reduce overly-burdensome, labor intensive, inconsistent and non-value-added processes. The intent of Lean at Clemson is to ensure all University employees take ownership in making this happen.

*Provide an explanation of the proposal and its positive results on businesses or citizens. How will the request affect agency operations?*