

**COMMITTEE ON PLANNING & BUDGET (CPB)**  
**MINUTES**  
**DECEMBER 9, 2025**

**PRESENT:**

David Oglesby, Earth & Planetary Sciences, CPB Chair  
Bahman Anvari, Bioengineering  
Richard Debus, Biochemistry  
Anthony Grubestic, School of Public Policy  
Cathy Gudis, History  
Steven Helfand, Economics  
Hyun Hong, Area of Accounting  
Scott Pegan, Biomedical Sciences  
Liz Przybylski, Music  
Jade Sasser, Gender & Sexuality Studies

**ABSENT:**

Vyjayanthi Chari, Mathematics, CPB Vice Chair  
Meng Chen, Botany & Plant Sciences  
Cong Liu, Electrical & Computer Engineering

Chair David Oglesby called the meeting to order at 11:05am.

CPB members voted to approve the November 18 meeting minutes. One member abstained from voting due to not attending the November 18 meeting.

**CHAIR UPDATES / COMMITTEE DISCUSSION**

Chair Oglesby attended the December 2 UCPB meeting, in which the following was discussed:

**University of California (UC) Budget and State Funding**

- Big Budget Request: The UC system is submitting a "going big" budget request to the state.
- Reduced State Deficit: The state's anticipated deficit is significantly less than expected, largely attributed to revenue brought in by the AI bubble (e.g., bonuses from AI companies).
- Compact Funding Gap: The UC system has met its enrollment goals as part of the recent compact with the state, but the state has not fulfilled its corresponding funding commitment. The large budget request is primarily aimed at securing this promised funding.

- UC Retirement Plan (UCRP): UCRP is reported to be in good shape, funded at around 90% (with an accounting caveat) and expected to be fully funded within a few years. There are no plans to increase employee contributions soon.
- Tuition Stability Plan: The Regents approved a plan where a student's tuition and fees are locked in for the normative time of their degree. Fees for subsequent cohorts will increase according to the California Consumer Price Index plus an additional 1% for capital needs.
- Other UC Campuses: Campuses like Merced, Santa Cruz, and Santa Barbara are facing severe cuts due to structural deficits, a fate UCR is actively trying to avoid.

### **Negotiations Update**

- GSRs and TAs: Negotiators have largely settled non-income issues and are now focused on salary (the "cold hard cash").
- Arbitration Challenges: UC administrators report that arbitrators and the Public Employment Relations Board often lack understanding of higher education's unique characteristics (e.g., graduate student-advisor relationships), leading to UC frequently losing in arbitration.
- Faculty Involvement: There is an emphasis on increasing the faculty's voice in negotiations this time, with structures in place to get Senate input.

Chair Oglesby recently attended a Campus Finance Committee meeting, in which the following was discussed:

- Positive Outlook: UCR's plan for new health clinics, including an ambulatory clinic in conjunction with UCSD and UCLA for specialized care, received a positive reception from the administration. This initiative is viewed as a potential "big winner" for UCR in the long run, as medical centers are a major source of revenue for the UC system.
- Faculty and Staff Ratios Committee Work: A joint Administrative-Senate subcommittee of the Campus Finance Committee will study and make recommendations on faculty/staff/student ratios at UCR to incorporate into UCR's campus budget operating model for academic planning purposes. The subcommittee plans to include someone from Institutional Research (which tabulates hard data/numbers) as a dedicated resource to expedite access to necessary institutional data.

In the context of exercising caution: CPB members shared past experiences suggesting IR data can be incomplete, lagging, or requires extremely specific questioning to yield useful results, especially concerning the research enterprise. Furthermore, CPB members suggested:

- **Granularity is Key:** The analysis must be granular, acknowledging that ratios depend heavily on the position and the type of teaching (e.g., an in-depth writing course needs more support than a large lecture course).
- **Addressing Teaching Loads:** There is a need to address uneven teaching loads across campus to find internal efficiencies, which has implications for new faculty hiring.
- **Benchmarking:** The subcommittee must decide on comparable and aspirational universities for benchmarking ratios, recognizing that UCR's challenges differ from those of institutions like UC Berkeley.
- **Revenue Consideration:** The final ratio model must consider revenue—it's possible to define minimum functional ratios that still require more revenue to avoid structural deficits.
- **Scope:** The analysis should include non-academic staff and administration as well, as this area has also seen significant growth.
- **Timeline:** The committee aims to have a report ready by June 2026 and is planning an initial meeting with all members and deans soon, possibly before the holidays or early January 2026.
- **Avocado Metaphor:** The importance of timely input was highlighted: waiting until the time is "ripe" (the avocado metaphor) can mean it's too late to have a meaningful impact on the process.

Chair Oglesby will attend the Chancellor's budget meetings in February and March 2026, where all campus units will present their finances and alignment with strategic plans. This is part of the Chancellor's effort to reevaluate the budget model, and the information gathered may inform the ratio discussions, particularly regarding staffing.

#### **MEET WITH ACADEMIC SENATE CHAIR**

The Academic Senate Chair, Ken Barish, indicated that in his view the main budgetary challenge at UCR is a structural problem driven by mandated, non-negotiable cost increases, particularly from union contracts (like those for TAs and GSRs), which are rising at least 5% per year. This increase is occurring without corresponding revenue growth other than tuition. While growing tuition increases revenue, it also requires hiring more staff and faculty to accommodate the students, creating a self-perpetuating structural deficit. UCR is currently better off than some other UC campuses that began with large deficits, but UCR faces a "serious long-term problem" and is on track to experience the same major structural deficits seen elsewhere. This structural issue is the impetus for UCR's current discussions/planning regarding faculty, staff and student ratios.

For the first time since Senate Chair Barish himself served as CPB Chair, this school year CPB will have access to all campus units' budgets. Senate Chair Barish views this as a new opportunity for more transparency and deeper analysis into the campus' budget—despite the fact that it will be a lot of work. Senate Chair Barish suggests that CPB's focus be on "really trying to understand and drill down" into the budgets and then synthesize the information in a useful way for the entire campus.

Senate Chair Barish cautions, however, that CPB simply being provided all the raw budget data from administration does not equal transparency. He notes that in the past, all information was available; but it was so complex that "nobody could understand it." True transparency means having data "synthesized at a higher level" to make it comprehensible and actionable for the general faculty on campus. Drowning people in confusing information would equate to/be considered the opposite of transparency.

Senate Chair Barish explains that many quick implementations at UCR are driven by unfunded mandates coming from the UC President (e.g., security) or changes in Federal/State law (e.g., the new accessibility mandate for all websites and Canvas sites). Administrators often follow these mandates with the "cheapest solution," and they may claim that the deliberative Senate process is too slow to meet the required implementation timelines. They do not view these non-negotiable legal/presidential requirements as falling under standard shared governance structures. Senate Chair Barish notes that the administration repeatedly promises that poor implementation, like the security mandate, is a "one-time thing," only for another such occurrence to arise. CPB Chair Oglesby interjected briefly and suggested that the Senate needs to insert itself between the mandate from above and the campus-level implementation to ensure the specific *how* of the policy is effective (e.g., choosing a long-term cost-effective implementation rather than the immediate cheapest option). Senate Chair Barish agreed this is the goal, but the conflict with administrative timelines remains unresolved.

Senate Chair Barish decided to create a UCR-UCAD task force/committee—a group that does not mirror the UCAD effort but serves to provide more rapid advice and feedback to the administration if an immediate disruption occurs. The newly formed committee includes representatives from major committees, including an appointee from CPB (Professor Jade Sasser). The goal is to prevent the administration from using the excuse that they cannot get fast enough feedback from the faculty. The UCR-UCAD body is intended to be prepared and up to speed to deliberate and respond quickly. Senate Chair Barish informed UCR's Chancellor and Provost that the UCR-UCAD committee was established specifically to allow the administration to consult the faculty quickly on critical issues that require a fast response time. Similar rapid response groups were needed during events like COVID-19 or situations involving protests on other campuses. Senate Chair Barish warns against letting this rapid process become the normal process, as the regular deliberative process is considered superior.

When asked about the budgetary/practical challenges of meeting accessibility requirements, specifically for video closed captioning: Senate Chair Barish conveyed that when he met with Excite, he was informed that YuJa's automated closed captioning is adequate for a high percentage of cases (around 95%), making it sufficient for most needs. For cases where the

automated captioning is insufficient (e.g., due to strong accents or other language barriers), a request can be made for manual captioning. While the legal requirement is 100% compliance, Senate Chair Barish acknowledges that reaching 100% may not be feasible, especially in the short term. The current focus is on implementing the relatively easy things first to achieve "mostly compliant" status and then progressively improve, viewing full compliance as an aspirational goal.

**[CAMPUS REVIEW ITEM] DEPARTMENT NAME CHANGE: DEPARTMENT OF PSYCHOLOGY TO THE DEPARTMENT OF PSYCHOLOGICAL AND BRAIN SCIENCES**

CPB did not see any budget-related red flags and has no objections to the proposed department name change.

**[CAMPUS REVIEW ITEM] PROPOSED PATHWAY TO RETIREMENT PROGRAM**

CPB reviewed/discussed the proposed "Pathway to Retirement Program" designed to support UCR Senate faculty members as they plan and transition from active service to retirement. The motivation for developing this program at UCR, which follows a similar program at UC Santa Cruz, stems from a recognition that retirement is both a personal decision and an institutional transition point. Many faculty wish to conclude their active service in a manner that allows them to complete scholarly projects, mentor students, and prepare their departments for leadership and curricular continuity. The proposed pathway provides a means to formalize such arrangements, allowing faculty and administrators to craft individualized, pre-approved agreements that clearly outline expectations and commitments during the final phase of service. The program envisions two categories of provisions:

- *Pre-retirement provisions that may include waivers of mandatory reviews, modified teaching or service assignments, or targeted research support to assist in the completion of ongoing work.*
- *Post-retirement provisions that may, where appropriate, include recall appointments for teaching or research, continued access to office or laboratory space, or limited research support to sustain scholarly activity and connection to the academic community.*

Each Pathway to Retirement Agreement would be jointly approved by the faculty member, department chair, and dean, with all financial and programmatic commitments explicitly defined. Agreements would specify a separation date no more than two years from approval and would constitute a binding commitment by both parties. Faculty participants would remain responsible for completing the formal steps necessary to elect retirement and initiate benefits under the University of California Retirement Program.

CPB generally supports the proposed program; yet thus far has the following comments:

- *The language for "Pre-retirement provisions" states: "Research funds may be provided, subject to availability, for faculty to complete ongoing projects." There is concern about a Chair who*

*might favor certain faculty/areas. It could be important to include safeguards or limits in this regard.*

- *Furthermore, the agreement states: "Once approved, the pathway to retirement agreement cannot be modified or withdrawn, as it is a binding contract." Binding contracts can normally be withdrawn if no harm is caused to either party and if agreed to by both parties.*

#### **[CAMPUS REVIEW ITEM] PROPOSAL: MASTER OF SCIENCE IN DATA-DRIVEN MARKETING & AI APPLICATION (MSDM-AA)-SSGDP**

CPB reviewed/discussed the proposal for a Master of Science in Data-Driven Marketing & AI Application (MSDM-AA) self-supporting graduate professional degree program. The program aims to fill a specific niche, distinct from the existing business analytics program, and is projected to be profitable in its first year.

Some CPB members felt that the program is appropriate for this moment in time, especially given the growth of data-driven marketing. UCR's School of Business has a history of successful self-supporting programs, which helped fund their new building. So, this proposed program may be successful as well. The need for the program, the target market, and its potential profitability were acknowledged in the proposal.

CPB members identified several areas that require clarification from the program proposers:

1. "AI" in the Title vs. Curriculum:
  - *Concern was raised that the core courses didn't appear heavily AI-driven, with AI content seemingly concentrated in elective courses.*
  - *The previous concern led to a worry about the name being slightly misleading ("bait and switch") if students default to a non-AI path; though it was noted the name is good for marketing.*
  - *A suggestion was made to require more explicit detail on how AI will be integrated into the bulk of the curriculum.*
2. Program Justification (Standalone vs. Track):
  - *A major question was why a completely new MS degree is necessary instead of simply creating a specialized track within the existing marketing degree.*
  - *CPB members agreed the proposers need to provide a clear, explicit justification for a standalone degree.*
3. Potential Cannibalization:
  - *There is a concern that the new program might cannibalize students from the existing state-supported majors (e.g., the traditional marketing major).*
  - *The proposal alludes to a distinct, younger market but does not explicitly address the risk of cannibalization.*
4. Fiscal Impact on Other Departments:

- *The proposal mentions students taking classes in other departments (state-supported classes). This raises questions about reimbursement/credit sharing agreements and the potential for hidden costs (e.g., forcing other departments to open new sections).*
  - *It was noted that letters of agreement from relevant department chairs might be needed to ensure capacity.*
5. "Soft Landing" for PhD Students:
- *The program is presented as a "soft landing" option for PhD students who do not finish their doctoral program.*
  - *The document lacks an explanation of the financial logistics for these students—specifically, how they would be charged (a la carte for remaining courses) versus paying the full program freight.*

The discussion also briefly touched on the general ambiguity of self-supporting programs, noting that some university self-supporting programs (like at UC San Francisco) are subsidized by non-state university funds, complicating the definition of "self-supporting."

The meeting was called to a close at 1:00pm.