

From: Provost <provost@ucr.edu>

Sent: Sunday, October 11, 2020 8:26 PM

To: Jason Stajich <jason.stajich@ucr.edu>

Cc: Cherysa P Cortez <cherysa.cortez@ucr.edu>; Provostadmin <provostadmin@ucr.edu>; Gerry Bomotti <gerard.bomotti@ucr.edu>

Subject: Request for Senate review: Self-supporting graduate degree programs

Dear Jason,

Attached is the draft policy from Financial Planning & Analysis for the administrative aspects of reviewing and managing fees charged by self-supporting graduate degree programs (SSGDPs). This policy is based on similar policies at other UC campuses and includes recommendations for how revenues from SSGDPs will be distributed to campus units that support those programs. A separate committee, chaired by Professor Kevin Esterling, is drafting a complementary policy that focuses on academic aspects of SSGDPs. I would appreciate receiving the Senate's feedback on the attached draft, especially from the Planning and Budget committee and from Graduate Council.

Sincerely,

Tom

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THE UNIVERSITY OF CALIFORNIA, RIVERSIDE
FINANCIAL PLANNING AND ANALYSIS
THE ROLE OF FINANCIAL PLANNING AND ANALYSIS IN THE ESTABLISHMENT AND
FINANCIAL MANAGEMENT OF SELF-SUPPORTING GRADUATE PROFESSIONAL
DEGREE PROGRAMS
Effective xx/1/20xx

INTRODUCTION

This policy details the role of the Office of Financial Planning and Analysis (FP&A) in the establishment and financial management of self-supporting graduate professional degree programs.

While the Academic Senate and academic units have primary responsibility in the establishment and management of these programs, FP&A will provide critical financial direction, analyses and support throughout the life cycle of these programs. This policy is meant to provide a clear outline of the role of FP&A in these programs. Clear guidelines for FP&A's involvement and demarcation of duties will provide greater transparency surrounding these programs to the Academic Senate, Graduate Division, Deans, Chief Financial and Administrative Officers (CFAO), faculty and the general campus.

THE POLICY

ESTABLISHMENT OF SELF-SUPPORTING GRADUATE PROFESSIONAL DEGREE PROGRAMS

During the Academic Senate review process, all proposals for new self-supporting graduate professional degree (SSGPD) programs must include a detailed cost analysis from FP&A which ensures that fees are based on a full and accurate assessment of program costs and will cover all associated program costs. Based on this analysis, FP&A will provide a recommendation on the financial viability of the proposed program to the Academic Senate.

FEE APPROVALS

Once a SSGPD program has been approved, FP&A will be the primary liaison between the academic unit and UCOP and will work annually with academic units for fee approvals related to the SSGPD programs.

At the end of each calendar year UCOP will provide the Associate Vice Chancellor of FP&A (AVC FP&A) the SSGPD fee proposal templates. FP&A will reach out to campus units to complete these templates for their respective programs. These templates include:

- Program Approval Status
- Cost Analysis
- Description and Summary Table
- Current and Proposed Student Charges
- Consultation Survey

THE ROLE OF FINANCIAL PLANNING AND ANALYSIS IN THE ESTABLISHMENT AND FINANCIAL MANAGEMENT OF SELF-SUPPORTING GRADUATE PROFESSIONAL DEGREE PROGRAMS

FP&A will establish a timeline for submission from campus units. Following analysis of submitted materials, FP&A will draft a cover letter from the Chancellor to the President requesting approval of student charges for the upcoming year and will submit the letter as well as completed templates to UCOP in March of each year.

ANNUAL FTE REPORTING

Each summer UCOP will provide the AVC FP&A a template tracking the FTE counts and salaries associated with SSGPD faculty. FP&A will work with academic units to complete the template for each SSGPD and then submit to UCOP each fall.

CAMPUS ASSESSMENT OF SELF-SUPPORTING GRADUATE PROFESSIONAL DEGREE PROGRAMS

FP&A will also be responsible for the administration of the campus assessment to all SSGPD programs. The campus assessment will be applied as a percentage of program revenue to assure that secondary support services receive a portion of funding needed to maintain campus infrastructure as students within SSGPD programs utilize courses, infrastructure and services funded by general funds.

During the proposal phase, FP&A will provide the Academic Senate with financial projections of the campus assessment to be applied to the program revenue as well as expected uses and allocations for collected revenue.

FP&A will manage the assessment allocations to campus units directly impacts by SSGPD programs based on student headcount and the relative cost of services. Campus assessment revenue will be used to fund the following services:

- Registrar
- Cashier's Office
- Graduate Division
- University Library
- Information Technology Solutions
- Administrative Cost Recovery
- Space charges for centrally funded facility infrastructure and costs
- UCOP Assessment

Once a SSGPD program has been approved and is operationalized, FP&A will be responsible for annually applying the campus assessment to each program. FP&A will work with the CFAO of the academic unit to complete the financial transaction.

FP&A will then provide annual reports of assessment revenue and allocations to the Academic Senate Committee on Planning and Budget.

**THE ROLE OF FINANCIAL PLANNING AND ANALYSIS IN THE ESTABLISHMENT AND FINANCIAL
MANAGEMENT OF SELF-SUPPORTING GRADUATE PROFESSIONAL DEGREE PROGRAMS**

Approved By:

Kim A. Wilcox
Chancellor

Date

Thomas M. Smith, Ph.D.
Interim Provost and Executive Vice Chancellor

Date

Gerard J. Bomotti
Vice Chancellor for Planning and Budget

Date

Harry Tom
Chair, Academic Senate Committee on Planning and Budget

Date