April 14, 2021

TO: Thomas Smith, Interim Provost & Executive Vice Chancellor
Gerry Bomotti, Vice Chancellor for Planning, Budget & Administration

FROM: Jason Stajich, Division Chair

RE: Draft Policy: Role of UCR Financial Planning & Analysis in the Establishment and Financial Management of Self-Supporting Graduate Professional Degree Programs

The Executive Council discussed the proposed policy and the committee responses submitted and is pleased to provide the attached and below consultative feedback.

Executive Council points out the need for the Academic Senate to be added to the list of impacted departments affected by Self-Supporting Graduate Professional Degree Programs in the proposed policy. The Executive Council stressed the importance of the policy to accurately reflect the true cost to campus and the responsibility that state-supported funding is being used appropriately.
PLANNING & BUDGET

April 13, 2021

To: Jason Stajich, Chair
   Riverside Division

From: Katherine Kinney, Chair
       Committee on Planning and Budget

RE: [Campus Review] Draft Policy: Role of UCR Financial Planning & Analysis in the Establishment and Financial Management of Self-Supporting Graduate Professional Degree Programs

Planning & Budget (P&B) discussed the draft policy and met with VCPB Bomotti to clarify key issues. In recent years, a number of proposals for Self-Supporting Graduate Programs have been submitted to P&B for review. These proposals include projections of the costs as well as revenues for the program. Such costs to date have been nearly impossible to evaluate because there has been no consistent standard for calculating costs in relation to use of secondary services and campus infrastructure. P&B supports the proposal for FP&A to provide a cost assessment and a recommendation regarding the financial viability of SSP proposals.

While the benefit to evaluating new programs is clear, concern was voiced by some members that a campus assessment on existing programs could threaten their viability and discourage the cultivation of new programs. The committee discussed these concerns with VCPB Bomotti, who assured the members of the committee that there was no intention in this proposal to weaken current programs or discourage development of new ones. Standardizing financial accounting and reporting for SSPs is critical to effective Senate oversight of all academic programs. The majority of the committee supports the application of a campus assessment on SSPs to recover costs fairly calculated across all units.
COMMITTEE ON EDUCATIONAL POLICY

December 14, 2020

To: Jason Stajich, Chair
Riverside Division

From: Stefano Vidussi, Chair
Committee on Educational Policy

RE: Draft Policy for the Administrative Aspects of Managing Fees Charged by Self Supporting Graduate Degree Programs (SSGDPs)

The Committee on Educational Policy reviewed the draft policy for the administrative aspects of managing fees charged by Self Supporting Graduate Degree Programs (SSGSPs) at their December 4, 2020 meeting. The Committee is supportive of establishing a policy for this issue but recommends that the policy be updated to include the specifics on how the funds will be allocated and managed.
GRADUATE COUNCIL

December 2, 2020

To: Jason Stajich, Chair
   Riverside Division

From: Amanda Lucia, Chair
       Graduate Council

Re: [Campus Review] Draft Policy: Role of UCR Financial Planning & Analysis in the Establishment and Financial Management of Self-Supporting Graduate Professional Degree Programs

The Graduate Council discussed the draft policy of Financial Planning & Analysis’ role in the Establishment and Financial Management of Self-Supporting Graduate Professional Degree Programs at their November 19, 2020 meeting.

The Council did not feel the proposal provided enough detail or guidance nor does it address the issues and concerns the Council has been raising with the administration for the past couple of years.

The infrastructure the state supported programs provide for the self-supported programs needs to be calculated and included in this proposal. It is not apparent that the proposal includes a defined percentage (“tax”) that will be collected from each self-supporting program and distributed back to the units on campus that support these self-supporting programs (listed on page 2 of the proposal). Is Financial Planning & Analysis determining a percentage each program will pay based on each individual program? It is the Council's understanding that there are other UC campuses that have already determined this “tax” rate for their campuses. The Council urges the administration to consult with other UC campuses on the amount they charge their self-supporting programs to determine a rate UCR can collect from self-supporting programs so that the units on campus that support them can finally be compensated for the services they provide. There are high percentages of students in these self-support programs who are on academic probation.
which creates a heavy workload for many staff in the Graduate Division who are paid using state funds. This issue needs to be rectified.

Regarding the bulleted list of units impacted by self-supporting programs on page 2, will the distribution to each of these units be equal and how will it be determined?

Lastly, there is a typo in the paragraph above the bulleted list of impacted units. The word “impacts” should be “impacted”.
November 24, 2020

TO: Jason Stajich, Chair  
Academic Senate

FROM: Philip Brisk, Chair  
BCOE Executive Committee

RE: The Role of Financial Planning and Analysis in the Establishment and Financial Management of Self-Supporting Graduate Professional Degree Programs

Dear Jason,

The BCOE Executive Committee reviewed the proposed policy that encompasses the Role of Financial Planning and Analysis in the Establishment and Financial Management of Self-Supporting Graduate Professional Degree Programs (SSGPDPs). The BCOE Executive Committee members raised no objections to the proposed policy.

The BCOE Executive Committee would like to take this opportunity to make the following recommendations to ensure that this policy is implemented effectively:

- The assessment (tax) structure may emerge as an impediment. While large assessments are beneficial from a Central Administration perspective, it reduces the incentive at the College/School or Departmental levels to create new SSGPDPs or continue existing ones.
  - A positive framing of this statement would be that a typical SSGPDP would prefer limited assessment coupled with limited oversight.
  - A negative framing of this statement would be that a typical SSGPDP would be strongly opposed to additional assessments in exchange for additional oversight.

- The proposed policy could benefit from providing additional information about the role of the Senate vis-à-vis the role of Campus Administration.
  - It is unclear which structures/committees are presently doing what for existing SSGPDPs.
  - The role of the Senate Committee on Planning and Budget is unclear, and whether or not it is advisory.

Sincerely,

Philip Brisk
BCOE Executive Committee
November 16, 2020

To: Senate

From: School of Business Executive Committee

Re: [Campus Review] Draft Policy: Role of UCR Financial Planning & Analysis in the Establishment and Financial Management of Self-Supporting Graduate Professional Degree Programs

The School of Business Executive Committee discussed the above document. The Executive Committee agrees that it is appropriate for the Office of Financial Planning and Analysis (FP&A) to provide critical financial direction, analyses and support throughout the life cycle of these programs. However, the Executive Committee expressed some concerns about the clarity of how the campus assessment will be calculated, which are detailed below:

1. The proposal states at one point that (1) the campus assessment will be applied as a percentage of program revenue, and at another point that the (2) the assessment will be based on student headcount and the relative cost of services. These two statements appear to be inconsistent. In particular, there is concern that the assessment method (1) above will lead to a percentage being applied to student tuition as a “tax” regardless of the actual cost being incurred in supporting a student of that program by central services. For example, students in an online program may use few campus services. The Executive Committee felt that the campus assessment should be based on the actual additional cost incurred by central services to support a student in the program rather than as a “percentage tax” on revenue, and such a principle should be clearly stated in the proposal. Imposing a tax that is unrelated to actual cost will create perverse incentives that will stifle growth in self-supporting programs that create new educational opportunities for students.

2. Another problem in defining the campus assessment as a percentage of revenue is that there is no definition of program revenue that is provided, namely whether it will include scholarship/fellowships to students or other programmatic expenditures.
November 20, 2020

TO: Jason E. Stajich, Chair
   Academic Senate

FROM: Lucille Chia, Chair
   CHASS Executive Committee

RE: Draft policy from Financial Planning & Analysis for the administrative aspects of reviewing and managing fees charged by self-supporting graduate degree programs (SSGDPs)

The CHASS Executive Committee approves the description of the role of the Financial Planning & Analysis in reviewing self-supporting graduate degree programs.
23 November 2020

To: Jason Stajich, Chair
Riverside Division

From: Theodore Garland, Jr., Chair, Executive Committee
College of Natural and Agricultural Science

Re: Campus Review: Draft Policy Role of UCR Financial Planning

The CNAS Executive Committee supports this proposal.

Cheers,

[Signature]
November 20th, 2020

To: Jason Stajich, Ph.D., Chair, Academic Senate, UCR Division

From: Declan McCole, Ph.D., Chair, Faculty Executive Committee, UCR School of Medicine

Subject: SOM FEC Response to the draft policy on Self-Supporting Graduate Professional Degree (SSGPD) Programs

Dear Jason,

The SOM Executive Committee reviewed the draft policy on Self-Supporting Graduate Professional Degree (SSGPD) Programs. The proposal seems logical and addresses the main points for financial analysis of these degree programs and provides specific and appropriate guidelines. One item that should be elaborated upon is how the ‘campus assessment revenue’ will be allocated/weighted to the specific services in the bullet points (Registrar, cashier’s office etc.). It is likely that these services may be used differently according to the programs (indeed, there is a mention of ‘student headcount’ and ‘relative cost of service’). It would be helpful to have more information and examples of how the decision to distribute this money to campus units will be made, and whether it would be vary substantially depending on the program.

Yours sincerely,

Declan F. McCole, Ph.D.
Chair, Faculty Executive Committee
School of Medicine
TO: Jason Stajich, Chair
Riverside Division

FR: Richard M. Carpiano, Chair
Executive Committee, School of Public Policy

RE: [Campus Review] Draft Policy: Role of UCR Financial Planning & Analysis in the Establishment and Financial Management of Self-Supporting Graduate Professional Degree Programs

Date: November 20, 2020

The Executive Committee of the School of Public Policy reviewed the distributed document “Draft Policy: Role of UCR Financial Planning & Analysis in the Establishment and Financial Management of Self-Supporting Graduate Professional Degree Programs.” No concerns or issues were raised.

Sincerely,