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

Consistent with the requirements of the system-wide CCGA handbook, 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 for financial matters, 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
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 program 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 to help 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 assessments to be applied to the program revenue as well as expected uses and allocations for collected revenue. Note: FP&A will evaluate and propose a transition plan for SSP degree programs that were in place prior to the approval of this policy to limit any major changes in charges.

FP&A will collect the revenue from assessments to SSP programs, and manage the assessment allocations to campus units directly impacted by SSGPD programs size and the relative cost of services. Campus assessment revenue will be used to provide funding to the following programs:

- Graduate Division
- Administrative Cost Recovery
- UCOP Funding 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.

Approved By:
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Chancellor

Elizabeth Watkins  
Provost and Executive Vice Chancellor

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Vice Chancellor for Planning and Budget

Dana Simmons  
Chair, Academic Senate Committee on Planning and Budget

Date