Academic Affairs Fiscal Contacts Meeting

March 18, 2014

Budget/Financial Updates

>> UCSD Strategic Plan
Campus Reorganizations
Budget & Campus Budget Process
Faculty and Staff Salary Increases
UG Instructional Alloc Update
Grad Support & GSGEI
Summer Teaching Scholars

Budget/Financial Updates (cont.)

>> Research Administration Training
Control Tracker
VA and VMRF Recharges
Endowments & Balances
New Program 404000
Use of Program 403000

UCSD Strategic Plan

▶ Goals
  ◦ Student-Centered
  ◦ Research-Focused
  ◦ Service-Oriented
  ◦ Public University

  http://plan.ucsd.edu/documents/Strategic_Planning_Goals_and_Strategies.pdf

▶ Research Themes
  ◦ Understanding and Protecting the Planet
  ◦ Enriching Human Life and Health
  ◦ Exploring the Basis of Human Knowledge and Creativity
  ◦ Understanding Cultures and Addressing Disparities in Social Justice, Access, Equity and Inclusion

Campus Organizational Changes

- VCEBA to new VC-Advancement
- New VC and Chief Financial Officer
- Student Health Services from VC-SA to VC-HS
- Career Services from VC-SA to VC-A/Alumni Affairs
- VC-SA now reports to EVC-AA
- New Office of Ethics and Compliance, reporting to Chancellor
  ◦ Ombuds Office
  ◦ Audit & Management Advisory Services
- New Office of Operational Strategic Initiatives

Budget

- Governor's budget proposes 5% increase in UC budget
- No student tuition increases proposed
- 14/15 UCSD Budget Planning Process
  - Moving toward an all-funds budget model
  - Work to align resources with the strategic plan
  - VCs submit budget requests to Chancellor
  - Make use of existing fund balances
  - Focus on establishing "spending authority"
  - Focus on how funds are spent now

Faculty and Non-Rep Staff Salary Increases

- President Napolitano has approved a 3% across-the-board salary increase for faculty and non-represented academic personnel, effective 7/1/2014.

- Chancellor Khosla has approved a salary increase program for non-represented staff, effective 7/1/2014. The program calls for a 3% increase, with 2% distributed as an across-the-board increase and the remaining 1% used for merit-based increases.

Undergraduate Instruction Allocation Update

- 13/14 allocation for undergraduate instruction (which includes funding for temporary faculty and teaching assistants) will be updated in April

- Funding will be re-calculated for each division, updating course counts and enrollment to include Fall 2013 and Winter 2014 enrollment

- Check with your Dean's Office to find out whether your department will receive additional funding

Graduate Support: GSGEI

- Fall 2013 has been calculated and transferred to departments
- Winter 2014 allocation will be calculated and transferred to departments by April
- Spring 2014 allocation will be calculated and transferred to departments by June
- Departments will be required to report on 13/14 expenditures under this program
- Large carry forward balances are discouraged; most funds should be spent by 6/30/14

Graduate Support: Block Grant

- The EVCAA has requested that the carry forward of block grant funds allocated by OGS will be strictly limited to no more than 20% of the annual allocation.
- The funds subject to this limitation include Block Grant (BG), OP Match and Return-to-Aid (RTA) funds.
- The limit will be phased in as follows:

  6/30/14 = 60%
  6/30/15 = 40%
  6/30/16 = 20%

- Re-appropriated funds will be used at the discretion of the EVCAA for other financial support programs that directly benefit graduate students.

Summer Graduate Teaching Scholars

- Effective Summer 2014, faculty mentor payments will be $500 transferred to a faculty research/discretionary account instead of paid as salary
- Fund source is 19900A
- Funds will be transferred in July, after course enrollment is confirmed

Research Administration Training Coordinator

- Chancellor has approved funding for a campus research administration training coordinator in the Office of Research Affairs
- Job description has been drafted and feedback has been requested from the ABA and ORUBA
- Position should be posted for recruitment very soon

Control Tracker

- Control Tracker is a web-based application developed by UCSD to document the performance and certification of control activities within a unit in compliance with SAS 112/115.
- This application will take the place of the paper "UCSD Department Key Controls Documentation" document effective July 1, 2014.
- All units must document their performance and certification of key control activities through this application.
- For more info: blink.ucsd.edu/go/controltracker

VA & VMRF – Recharge Policy

▸ UCSD Chancellor has agreed to a waiver of differential income charged for research services provided to VASDHS and VMRF held research projects with UCSD faculty appointed as Principal Investigators.

▸ Investigators working at the VASDHS and the VMRF will have access to UCSD recharge services (e.g., Animal Care Program, Biogem, Core Bio Services, Center for Functional MRI, Imprints, etc.) at the internal UCSD rates without any differential income or administrative overhead assessments as of July 1, 2013.

▸ Mechanisms for implementing this waiver are under discussion

Endowments & Balances

- Good stewardship of endowments continues to be a campus priority
- Review of balances in endowment funds
  ◦ Meetings of EVC staff and dean's offices
- Focus on assisting with developing strategies to make use of smaller endowments and with developing other long-term strategies to ensure that balances don't accrue

New Program Code: 404000 – Faculty Support Allocs

- New program code created to allow departments to better segregate faculty support allocations and expenses from on-going departmental operations
- Use of this program code is not required

Use of Program Code 403000

- Program 403000 was created to separately record faculty startup and retention costs
- To enable better campus reporting of these costs to the Deans, EVC, Chancellor, and UCOP, all departments should use this program code when setting up new indexes
- For faculty hires and retentions effective 7/1/14 or later, the EVC's office will only transfer funds to program 403000 for startup and retention

GCCP

>> Call for Participation
Deadlines
Reporting
Review of Revised Request Form and Salary Worksheet

GCCP – Call for Participation

- Email notice was sent to Senate faculty on 2/27/2014
- Minor changes in implementation guidelines
  - Include FSEP and SAB/leave request forms with GCCP request form, not afterward
- Some revisions to request form and salary worksheet
- Link:

http://academicaffairs.ucsd.edu/aps/compensation/gccp.html

GCCP – General Deadlines

- Deans may set different deadlines from the general deadlines listed below
- Proposals should be sent to department chairs no later than <u>April 1</u>
- Chairs should endorse proposals and send to Dean's Offices no later than <u>April 15</u>
- Dean's Office should review, endorse and send proposals to EVC no later than <u>May 1</u>
- EVC and CAP will review and approve proposals by <u>June 1</u>

GCCP – Reporting

- UCOP/campus committee continues to work on metrics for program
- Information will include surveys of faculty and administrative staff, participant demographics, salaries, fund sources, teaching responsibilities, graduate student support
- Annual report due to departments, deans, CAP, Academic Senate and UCOP by November 1

GCCP – Revised Request Form

- Review of Excel sheets