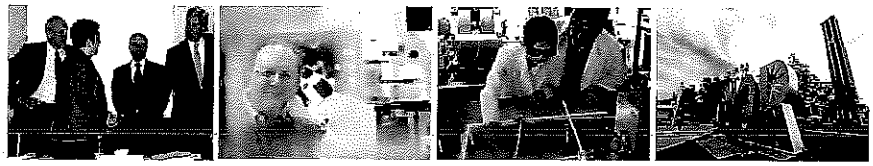
We need more information to assess -
- percent cut
- $$ cut
- increased income for self-support

UCR

Budget Model Refinement Discussion

BCOE Leadership Meeting
October 2018



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Agenda

1. Budget Model Refinement Schedule
2. Opportunities for Refinement
   - Significant Financial Challenges/Issues
   - Overall Policy Issues
   - Budget Model Formula and Other Adjustments
   - More Technical Issues in the Budget Model

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Budget Model Refinement Schedule

Budget Model Refinement Schedule

Constituent Type	Constituent Group	Venue
Leadership	Senior Leadership	Leadership Retreat
Academic Senate	FY15-18 Division Chairs/CPB Chairs and members	Meeting
	Planning and Budget	Committee Meeting
	Research	Committee Meeting
	Physical Resources Planning	Committee Meeting
	Executive Council	Committee Meeting
	Educational Policy	Committee Meeting
	Graduate Council	Committee Meeting
	Faculty Welfare	Committee Meeting
	Courses	Committee Meeting
	Diversity and Equal Opportunity	Committee Meeting
	Library and IT	Committee Meeting
Faculty	Chairs and Directors	Chairs and Directors Meeting
	Faculty	Open Forum
Financial Admin	CFAOs	Monthly CFAO Meetings
Staff	Staff Assembly	Open Forum
Students	Student Leadership (undergraduate/Graduate)	Student Leadership Meetings
	Diversity Council/VCSA/Interim Dean of Students	Diversity Council Meeting

FP&A will also administer a survey to solicit feedback from those unable to join targeted consultations

Budget Model Refinement Schedule

Key Milestones/Goals

Date	Milestone
September 10, 2018	Senior Leadership Retreat
November 1, 2018	Updated draft of proposed refinements to the budget model available for public comment
December 15, 2018	Campus feedback on proposed refinements due to VCPB
January 1, 2019	Provost and VCPB send final recommendations of budget model refinements to Chancellor for consideration

Budget Model Resources

The Financial Planning and Analysis (FP&A) website includes a number of helpful resources on the budget model and refinement process

https://fpa.ucr.edu/budget-model-refinement

- Budget Model Overview
- Budget Model Refinement Document
- Budget Model Refinement Schedule

Opportunities for Refinement

- Significant Financial Challenges and Issues
- Overall Policy Issues
- Budget Model Formula and Other Adjustments
- More Technical Issues in the Budget Model

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Salary and Benefits

Context

Under the model there is distributed authority and responsibility for existing salary and benefit budgets, but central campus retains responsibility for all salary and benefit increases

Key Issues

- Central responsibility for these increases only works with the highest assumed levels of state and tuition increases
- Current modelling suggests central resources will go into deficit in near future
- Chancellor has requested multi-year planning for faculty salary increases

possible changes to how these are funded

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School of Medicine Undercapitalization/Base Funding

Context
Undercapitalization of School of Medicine may be one of the largest and most significant financial threats to UCR

Key Issues
- Base support for School of Medicine must be increased
- UCR will need to subsidize the program if base funding not increased

We only $15m/yr. of base support

There are also other fixed costs that are increasing.

Rapid Growth of Assessments to Auxiliary Units

Context
The rapid growth of central assessments to auxiliary units is an unintended consequence of the budget model

Key Issues
- Student Recreation Center as primary example
- Rapid growth driven in part by student FTE in the indirect cost calculation
- Adjusting for student FTE has material impacts for Rec Center and Dining, but not other auxiliaries

Student Recreation Center Indirect Costs

Year	Assessment	Percent Increase
Prior Budget Model	$318K	
Year 1 Budget Model	$815K	156%
Year 2 Budget Model	$945K	16%
Year 3 Budget Model	$1.07M	13%

Student FTE affects this because they work for Student Rec, Dining, etc.

Summer Sessions

Context
Summer Session currently operates on an independent legacy structure that is not integrated with Fall, Winter, Spring

Option
Treat Summer as Fall, Winter, Spring, with academic units responsible for scheduling and funding of courses

- Allocation of revenue would be changed to more closely align with Fall, Winter, Spring
- Increasing Summer FTE enrollment increases campus revenue
- Increased Summer enrollment could improve time-to-degree

No one seems to think this is a good idea.

This will cause less summer enrollment.

Non-Resident Tuition Income

Context
Historically, non-resident tuition income has been allocated 30% to central resources and 70% to Schools/Colleges. Scholarships and discounts for non-residents have been funded centrally. To be consistent with undergraduate resident tuition, scholarship/discounts will now be taken off the top.

Key Issues

- Given lack of state support for non-resident students, the current model does not create a sufficient pool at the central campus to support increased growth in the number of non-resident students

Financial aid is currently taken off the top first.

2.9% UG non-resident currently - wants to grow to 10%

There is an option to swap so 70% goes to central.

Recharge Rationalization

Context

Under recharge rationalization, $20M in budgets from recharge funds was transferred to general funds (19900). This figure includes $7M in core funds to Service Provider units to stabilize budgets and for those units to offer core services free of charge.

Key Issues

- Unintended consequences included increased fixed costs coupled with unsustainable demand
- Lack of renewal and replacement funding in budgets at the time of recharge rationalization meant that the process merely maintained inadequate existing funding levels in former recharge operations (did not represent a funding augmentation)

Uses have increased over the last few years. Need to rebalance.

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Overall Policy Issues

Topic	Description
Need for Increased Central Funds and "Reserves"	The current model does not provide sufficient resources to the central campus for strategic investment.
Existing Base Budgets	New model made the de facto assumption that the existing allocation of base resources was reasonable and appropriate for all units.
Economic Downturn	New model assumes the influx of new resources every year as well as adequate funding for fixed cost increases.
Performance Funding	Important part of model, but currently not financially able to implement. One option is to provide one-time allocations for defined high-value priorities.
Sustainability	UC system has an aggressive Carbon Neutral/100% Renewable Energy goal for the near term, but there are no significant sustainability measures currently in the budget model.
Strategic Plan	The annual budget process should begin with a focused discussion of the strategic plan and identify goals and objectives for the upcoming cycle.
Specialized Campus Programs/Units	The budget model does not address a number of specialized programs, including Natural Reserves Program, Ag Ops and the Botanic Gardens.
Online Education Incentives	Should there be incentives for online education in the budget model?
Multi-Year Budget Model	The current budget model calls for units to budget one year at a time.
Master's Tuition by Program	The current budget model allocates Master's Tuition at the School/College level. One option to provide incentives to departments to grow Masters programs is to have part of the allocation at the program level.

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Budget Model Formula and Other Adjustments

Areas for Adjustment
Space weights
Credit hour weights
Allocation of undergraduate tuition income
Fixed cost increase computation and priorities
Facilities renovation and support

More Technical Issues in the Budget Model

Other technical issues for consideration include:

- Service Level Agreements
- Funding schedule for enrollment growth
- Graduate (including PhD) incentives in model
- Off-cycle campus funding requests
- Old budget model structures
- TA allocation model
- Core research facilities support
- F&A distribution
- Deferred maintenance funding
- Interdisciplinary/intercollegiate programs
- Campus financial reporting
- Professional development for CFAOs and department-level management
- Tracking of "permanent" positions/commitments funded on cash dollars
- Grad Student fees versus services provided
- Technology Systems Investment Fund

UCR Decentralized Budget Model
Key Considerations and Questions
DRAFT 9/17/18

UCR began developing a new RCM-type budget model in 2015 and implemented the model on July 1, 2016 (FY17). While this represented a major transition for the campus, the implementation went relatively smoothly and with no catastrophic consequences; which was a major success in and of itself. In the prior budget model, tuition was held centrally and allocated incrementally across campus. That system was plagued by a perceived lack of transparency and unnecessary distance between decision-makers and the individuals responsible for implementing those decisions.

The new budget system has elevated the role of the deans in determining funding priorities, has streamlined and improved financial management processes, and has helped to foster university-wide collaboration and stakeholder engagement. While the new budget model has many benefits, it is not perfect. In fact, it was always assumed that some adjustments would be needed to the system after implementation. The campus is now engaging in a broad based discussion to review the budget model and gather feedback and information in order to strengthen the system. The following is an inventory of some ideas relative to possible adjustments to the current UCR budget model that have been assembled from various discussions across the campus of the past year. This DRAFT is for discussion and review purposes only, and not intended to be a directive for any changes that will be made.

Significant Financial Challenges and Issues

I. Salary and Benefits

The decentralized budget model allocates full authority for existing salary and benefit support for all positions to the Colleges/Units. Historically, salaries and benefits have been a significant point of financial flexibility for most institutions, through the Provost's office. The new budget model also centrally retains all responsibility to fund annual salary and benefit increases.

Under these assumptions, the current modelling suggests that central resources will go into deficit in the near future, for a host of reasons, but in large part driven by salary and benefits increases as well as recharge rationalization and faculty hiring beyond original plans.

Additionally, as Colleges/Units reallocate existing base funds, and then allocate new base funding, they have flexibility to create new positions, which then further increase the financial responsibility on the part of the central resources to fund salary and benefit adjustments. The down road implications of this condition, and possible adjustments, should be considered, as the current model does not appear sustainable.

We have modelled allocating academic salary increases to the Colleges, but even at the levels about 25% of the total it has some small positive impact on the Central financial issues, but does not materially address the central financial concerns. We might also consider looking at some salary savings assessment to capture more funds centrally on an annual basis, which would provide partial help, but would not address the base budget trajectory.

Another option being studied is a sliding scale based on central state/tuition income for coverage of salary and benefit costs. For example, if 75% of the total central incremental core funding will cover mandated salary and benefit increases, then no assessments to Schools/Colleges would be made. If this threshold is not met, proportional (to the School/College share of core funded salary and

benefits) assessments would be made to the Schools and Colleges in order to reach the 75% threshold (meaning no more than 75% of the central incremental funding would be used for such). The 75% level is arbitrary at this point based on an assumption that there are other important central mandates that are also required every year.

The Chancellor has requested that the campus initiate planning for faculty salary increases on a multi-year basis, and not the annual process that exists now. We will need to identify the appropriate structure to support this request and develop a proposal that can be shared with the campus, and assure it considers any changes that might be recommended in the existing budget model related to salary and benefit increases.

Background information: Prior to this budget model all faculty salary and benefit savings would be managed by the Provost, giving considerable financial flexibility. Each 1% of faculty salary and benefits (on core funds) is approximately $2M, and turnover could range from 4-7% or more. The annual salary and benefit increase are ranging in the level of $15-$16M/year, and for FY19 permanent base funding received was $2M less than mandatory cost increases.

II. School of Medicine Undercapitalization/Base Funding

Although this is not directly a budget model issue, it is critically important to address the School of Medicine undercapitalization/base funding. Otherwise, the campus will be required to subsidize the program. Such a subsidization will have a significant on any budget model and represent a slow shift away from RCM, given that funds planned for programming through this budget model would be diverted to the SOM.

III. Space Weights Based on Quality/Status

The current budget model does not distinguish cost for space, as all space has the same cost even though space on campus varies widely from agricultural/storage-type facilities to high-end facilities. Some consideration should be given to provide general weights to the type of space. For example, a rating system could be implemented as follows:

- Level 1 (High Quality)- Weight of 1.5
- Level 2 (Average)- Weight of 1.0
- Level 3 (Least Quality)- Weight of 0.5

In addition to quality of space, a second factor that could be considered is "type" of space. For example:

- Wet lab – weight of 1.5
- Office – weight of 1.0
- Etc.

Further, the current budget model also does not consider, nor provide incentives for, the *effective* use of space.

IV. Credit Hour Weighting

The current model does not provide any weights to credit hours or headcount majors. Most data on costing of higher education shows significant cost difference based on discipline (driven often by salary and benefit costs for faculty, accreditation issues, cohort size, curriculum issues, facilities/equipment needs, etc.) and level of instruction. It appears that some of these factors are already part of the "base" computed for the College, but these weights are not part of any incentive for enrollment growth. This should also be discussed and reviewed.

Further, feedback from academic units indicates that the current unweighted credit hour allocation does not provide sufficient TA funding for lab-intensive courses and courses of similar pedagogy.

V. Rapid Growth of Assessments to Auxiliary Units Thru New Budget Model

Student Recreation Center as one example of what are likely unintended consequences of the new model relative to the rapid growth of central assessments.

Student Recreation Center Indirect Costs		
Year	Assessment	Percent Increase
Prior Budget Model	$318K	
Year 1 Budget Model	$815K	156%
Year 2 Budget Model	$945K	16%
Year 3 Budget Model	$1.07M	13%

This growth is driven in part by the student FTE portion of the indirect costs calculation in the model. Adjusting for student FTE in the calculation has material impacts for Student Rec Center and Dining, but not other auxiliaries. For example, if student FTE were not considered for FY19, the Student Rec Center assessment would go down $575k and the Dining assessment would go down $1.8M. It is important to recognize that, if implemented, this would represent a $2.4M reduction in institutional base funds, which are already committed to on-going activities.

Such increases are not sustainable for the auxiliary units and must be addressed.

VI. Need for Increased Central Funds and "Reserves"

The **need for more funds to be held centrally** has been consistent feedback on the new budget model from the senior leadership team and campus CFAOs. For purposes of this discussion, "reserves" are defined as net funds of any commitments, whether these commitments are included in institutional accounting records or not.

Key Questions and Issues

- The budget model, as designed, is not feasible given the central requirement to cover all increased salary and benefit costs. There needs to be some adjustment that addresses this issue.
- Reserves overall for the campus and at the unit levels – what should be goals and how will we measure them and track them? A draft campus policy on reserves is currently under review.
- We should clarify what the principles should be to retain funds centrally vs. allocating to units. It is also important to have some sense of "reserves" at the unit levels, which are necessary under the current budget model.
- If units work to establish reserve funding it would be an important policy to assure they were not "raided" centrally in time of financial stress, as this would punish those units who were implementing prudent financial management measures.

- The budget model was designed to create a more entrepreneurial environment on campus and give units more direct authority and responsibility over their budgets. However, there are many vestiges of the old model still around where central funding is sought for many initiatives (see XXV below).

VII. **Need to Identify Viable Ways to Grow Total New Revenue for UCR**

Like any institution, UCR needs to identify ways to grow overall revenue, which would include more non-resident full paying students but needs to include other viable new revenue streams. There is a need to develop a specific plan to address this overall need. Another suggestion was to focus more investments on fund raising, to grow this revenue stream (although it would be restricted vs unrestricted funding).

Overall Policy Issues

VIII. **Existing Base Budgets**

The new budget model made the de facto assumption that the existing (at the time) allocation of base resources was reasonable and appropriate for all units. This may or may not be accurate, but it is important to note that the new model did not test this assumption for validity. The new budget model focused on allocations off this existing base.

IX. **Economic Downturn Scenario**

The new budget model assumed the influx of new resources every year as well as adequate funding for fixed cost increases. These assumptions should be discussed in further detail. While all public institutions are financially susceptible to economic downturns, it would be important to have some policy assumptions as to what steps the institution would take when an economic downturn presents itself. This would be important to help Schools and Colleges, and all campus units, plan (e.g., no central taxing of any "reserves" created at the School/College level, as a potential example of an important issue to be discussed).

X. **Performance Funding**

The budget model was originally developed with the intent to allocate performance funding permanently to Schools and Colleges.

Key Questions

- How does this issue now relate to item "VI" above (lack of central funds), if at all? Is it important to assure there is a performance component for the budget model going forward, even if funding allocated was only one-time vs. base?
- What are the implications of changing this allocation to one-time cash, and perhaps focusing on key issues like student retention and graduation rate increases?
- What are the specific metrics that would be used to allocate any funding? A suggestion is student retention and graduation rate increases. Other suggestions included incentives that may well go beyond Schools and Colleges, and could include Diversity related goals.

Background: Currently there is approximately $21.6M in performance funding held centrally. However, with the loss of financial flexibility as a result of all existing salary and benefits being allocated to the Schools and Colleges, these funds are being used to cover central costs such as debt payments and other commitments. There would not be sufficient funds in the near term to allocate all of these funds to units, but perhaps a few million could be allocated on an annual basis.

XI. Sustainability

The UC System has an aggressive Carbon Neutral goal for the near term including moving to 100% renewable energy, but there are no significant sustainability measures in the existing budget model. Some have suggested that incentives to save energy/utilities be built into the new budget model. This could also be a component of the "Performance Funding" element.

XII. Overall Budget Process and Interaction with Campus Strategic Plan

The new budget process has added a very important component of transparency to the overall process to develop and arrive at a final allocation of resources. This is very important to maintain in any "tweaks" of the process moving forward. However, the new process has also added administrative overhead, both at the individual College/Unit level as well as centrally that is very significant. We should work with the Colleges/Units to identify ways to materially lessen the administrative burden of the new process, but retain important aspects of transparency and sharing of important financial information.

The campus will be moving ahead to update the campus strategic plan. The campus strategic plan is a very critical component of any campus budget process, as that budget process should serve the strategic plan and be implemented within that overall context. **It is proposed that we start the annual campus budget process with a focused discussion of the strategic plan, and specific goals/priorities we see for that upcoming cycle.** These discussions can help frame the assumptions for that budget cycle and help assure the outcomes are consistent with the priorities in that strategic plan.

It is proposed that for each cycle of the budget process we insert these important steps at the end of the cycle to address annual accountability reviews of the budget process:

a. How do the allocation of incremental funds match what we believe are overall needs/priorities of the institution right now? It is important to always test how the budget process follows the strategic plan/campus priority process.
b. Are there specific ideas/suggestions we have accumulated from this process that we should consider for improvements for the next cycle?

As we evaluate the existing overhead with the budget model, we should consider other important information that is not currently part of the budget process. For example, it would be very beneficial and important to receive information from the administrative/service providers on campus about annual hiring plans, including existing staffing, projected hiring for the coming fiscal year, salary sources/assumptions on hires, and turnover during the year. The details of this information would need to be worked out with the appropriate units across campus. The Provost already receives hiring plans for faculty from the Schools and Colleges, but we do not have similar information for the administrative units.

XIII. Funding/Treatment of Specialized Programs/Units in New Budget Model

The new budget model does not address a number of specialized campus programs or units, such as the Natural Reserves Program, Ag Ops and the Botanic Garden. Given the size and impact of many of these units, consideration should be given to how these units might be incorporated into the model.

XIV. **Summer Sessions**

Summer Sessions should be integrated into the new budget model instead of operating on an independent legacy structure. One option is to treat Summer similar to Fall, Winter and Spring, with academic units being responsible for the scheduling and funding of the courses accompanied with a change in how revenue is allocated to more closely align with Fall, Winter and Spring.

Feedback also indicates that the Summer Sessions model should offer real financial incentives to the Schools and Colleges. Increasing Summer FTE enrollment will be an important option for increasing revenue, as Summer CA resident FTE is part of the annual FTE figure funded by the State, and can be used to offset Fall, Winter and Spring under-enrollments. Additionally, increasing Summer enrollments can also improve time-to-degree and the success of three-year degree programs.

XV. **Online Education Incentives**

The current budget model does not include any incentives related to online education. There should be discussion as to whether such incentives should be built into the model.

XVI. **Multi-Year Budget Model**

The current budget model calls for campus units to budget one year at time. In addition to multi-year planning for faculty salary increases, consideration should also be given to adjusting the model towards a multi-year approach (at least 2-3 years).

Budget model Formula and Other Adjustments

XVII. **Allocation of Undergraduate Tuition Income – Current Methodology and Background Information**

The budget model uses different methodologies for allocating undergraduate resident tuition, undergraduate non-resident tuition and fee increases. The sections below offer proposals to bring these methodologies into alignment.

a. **Undergraduate Resident Tuition (Background Information)**

Under the current model for undergraduate tuition, 33% is returned off the top to financial aid. Of the remaining 67% tuition revenue available, 70% is allocated to the Schools and Colleges and the remaining 30% is returned to central campus.

The portion allocated to the Schools and Colleges is apportioned as follows:

- 60% is allocated based the number of student credit hours taught ($3,351 for every 45 credit hours);
- 20% is allocated based on the number of majors ($1,068 per undergraduate major);
- 20% is allocated based on improvements in strategic campus goals ($1,068 per undergraduate major). Please note that the actual implementation of this performance piece of the budget model is currently under review.

In order to account for fluctuations in waivers, withdrawals and write-offs, the actual tuition allocations to the Schools and Colleges for a given year are based on a 3-year average of the calculated rate based on total net revenue at the campus level. Averaging over a 3-year period allows us to normalize the peaks and valleys associated with tuition calculations and to ensure that individual units are not penalized for these situations.

b. **Undergraduate Non-Resident Tuition Income**

Consistent with the allocation of Undergraduate Resident Tuition, scholarship/discounts (including Athletic waivers) are taken off the top and the remaining income is allocated 30% to central resources and 70% to the School/Colleges.

Similar to Undergraduate tuition, allocations on non-resident tuition to the Schools and Colleges for a given year are based on a 3-year average.

Given the lack of State Support for non-resident students, the current budget model allocation of non-resident revenue to central resources does not create a sufficient resource pool at the central campus to support increased growth in the number of non-resident students, especially in light of the significant level of recruitment efforts for non-resident students centrally funded.

A proposal for a new model is to allocate non-resident tuition income as follows: off the top scholarship/discount (including Athletic waivers); split the remainder 70% central and 30% School/College. Listed below is some baseline information from current modeling:

	UG Resident Net Funding Current Model	UG Non-Resident Net Funding (Base Tuition and NRT)	
		Current Model	Proposed Model
Central	$2.6K per student	$7.3K per student	$13.6K per student
School/College	$4.4K per student	$15.4K per student	$9.1K per student

The proposed methodology would continue to provide a larger tuition allocation to the School/Colleges for non-resident undergraduates than resident undergraduate students. There has been some feedback that this proposed change is too large of a shift, and that other distribution options should also be considered as part of this review.

c. **Undergraduate Tuition Increases**

As currently designed, any increases to the base undergraduate tuition fee ($11,220 as of FY14-15) are allocated to central resources. In order to bring undergraduate fee increases into alignment with non-resident tuition increases, it is proposed that all tuition increases follow the same percentage split used for the base tuition fee (currently 30% central and 70% Schools/Colleges for resident undergraduates). This may require an adjustment to the percentage split with central, but would also provide funding to the Schools and Colleges from any tuition increases.

XVIII. Fixed Cost Increase Computation, Including Unfunded Mandates

Currently, central campus only funds fixed cost increases related to salaries and benefits on permanently funded, core positions. There is currently no formal consideration given to funding fixed cost increases related to non-salary costs such as utilities, software licenses, books, periodicals, etc., some of which are known on a multi-year basis. There should be a **detailed review of how fixed cost increases are identified and budgeted.** It is very important to recognize the key infrastructure issues that are critical to the operations of the campus (facilities; IT; Library; etc.) and assure they are addressed in some reasonable way in the budget model. It is also important to track unfunded mandates, including those that may come from UCOP, and how best to address these through the budget model. It is proposed that we centrally develop estimates of these fixed cost increases to be part of the annual budget process kick off, and updated through the budget process. These estimates would be specifically highlighted and included as part of the important budget discussions.

XIX. Facilities Renovations and Support

a. $50K Cutoff

Facilities "renovations" within the new budget model should also be closely reviewed. **As currently designed, the budget model does not accommodate the differential space/facilities conditions across the Schools and Colleges**. Under the model, all building renovations less than $50K are prioritized by the Colleges and submitted to Facilities Services (FS) for implementation. FS designated a portion of funds from recharge rationalization towards these annual "renovations" ($2.4M).

Priorities in an older/depreciated building may be focused on getting adequate space within the building (perhaps heavy on the repair side). Space "renovations" in newer buildings, on the other hand, would likely be addressed without addressing building infrastructure and/or code issues.

Additionally, the $50K cut off for these FS funded projects should be reviewed and discussed, to make sure it is accomplishing what was intended. Under the current budget model, if the project costs $50K or less, FS completes it as part of their budget. If the project costs over $50K then the College pays 100% of the cost. This may lead to unintended consequences. For example, a $45K project in one College (perhaps with newer facilities) being paid 100% by FS while a $65K project in another College (perhaps with older buildings) being paid 100% by the College. This artificial cut off can understandably create both funding and perception issues.

b. Facilities Services' Priorities for Renovations

Facilities Services' methodology for prioritization of College renovation requests should also be reviewed. The process that was implemented was to ask, on a quarterly basis, all Colleges to submit any/all "renovation" requests, in priority order. FS then attempts to complete the #1 priorities for all of the Colleges, then goes to #2, etc. Concerns about this approach include:

i. The priorities from the Colleges are not all related to preparing space for new faculty hires. Was that an assumption relative to priority? We have, effective this summer, implemented an interim/temporary process to give priority to new faculty hires.
ii. Not all Colleges have the same facilities conditions, so in some cases Colleges (in better space) ask for priorities that, while desirable, may or may not even be close to the needs associated with other Colleges. The current process does not take into consideration the facilities conditions associated with the building being used by the Colleges. FS is likely then doing some projects that are "good to have" for one College (based on their relative priorities) while not addressing "critical" projects for another College.
iii. Not all Colleges are the same size in terms of numbers of faculty members, space, etc. However, the FS process basically approaches the Colleges as if they were each of the same size. This would be like the US Federal Government having a Senate, but no House of Representatives.
iv. Many of the actual building renovation projects end up requiring support from A&E in order to design the improvements. A&E is not budgeted in an effective way to support such reviews, including the fact that building code official activities are required to be funded through "recharges", which does not align with the base state funding of other related building code/requirement reviews (e.g. Fire Marshall and EHS).

A proposal for consideration is that the FS priority process for "renovations" from Colleges be based on the following criteria:

i. **New faculty hires:** In this regard, we would work to serve the priorities for all Colleges at an equal priority level.
ii. **Adjustments/Weights for the Size of the Colleges (faculty members, gross square footage, or some reasonable measure):** Here is where we would have to adjust the priorities to account for size and complexity of the buildings they occupy.
iii. **Condition of Facilities:** Some judgement must be allowed to accommodate new faculty space needs based on the existing condition in the current facilities.

The schedule to get requested renovations completed has also been noted as a concern and should be part of the review of the overall budget model.

XX. Recharge Rationalization

As part of the transition to the decentralized budget model, UCR underwent a "recharge rationalization" process which transferred approximately $20M in budgets from recharge funds to general funds (19900). As 70-80% of that funding covered salaries and benefits, the central campus obligation for fixed cost increases on general funds also increased as a result. Additionally, central campus provided $7M in core funds to Service Provider units in order to stabilize their budgets and for those units to begin offering core services to the campus free of charge.

While the rationalization process significantly reduced the number of transactions on campus, it also had the unintended consequence of materially increasing fixed cost obligations on general funds as well as the demand for many services that Service Providers now offer as core services across campus. The demand for these services often outpaces the level of core funding provided, resulting in the need to divert resources from other core service lines. It is proposed that the new budget model went too far in eliminating recharges, and some appropriate balance of recharge activity is likely appropriate. If there is a new approach to recharge activity, it will require appropriate allocation of funds removed from the Service Providers back to those campus units.

Feedback also indicates that recharge rationalization has eliminated some flexibility within academic units. Prior to the rationalization process, academic units were able to redirect funding based on the priorities and needs of the unit. This flexibility has been eliminated with rationalization as the academic units do not have an option to opt out of particular core services offered by the Service Providers.

Key Questions

- Are there core services across campus which should be transitioned back to recharge (partially or fully)? Some possible examples include:
    - Moves/setups
    - Coding and maintenance on non-campus-wide software applications
    - Non-instructional multi-media
    - Custom application development
    - Telephone line moves
    - Certain staff professional development/training
    - Non-research hazardous waste
    - E-waste
    - Facilities Services waste

More Technical Issues in the Budget Model

XXI. Service Level Agreements (SLAs)

With refinements to the budget model, there is the opportunity to discuss the overall value of SLAs and whether Service Provider units should remain required to produce these documents in their current form. It should be noted that SLAs were never designed to balance overall campus needs with the existing level of funding available. In many cases, current SLAs are, in fact, more aspirational than a reflection of current funding realities.

Key Questions/Issues

- What was the discussion surrounding SLAs and service upgrades? Were specific upgrades discussed?
- Some SLA service activities may not be funded at reasonable levels – what data is being used to measure expectations for SLA funding for what resources are provided?
- SLAs do not seem to be precisely balanced against where the providing unit started with their base budgets and any reasonable ability to deliver (e.g. capacity to perform). Some SLAs may be aspirational in terms of what we would like to be provided as a baseline.
- The SLAs do not have any real teeth. It seems the SLAs are mostly an administrative exercise without any demonstrable effects.
- It is very important to define service unit responsibilities even in the absence of SLAs.
- Feedback also indicates that it would be helpful for Schools/Colleges to have more predictability regarding potential increases to Service Provider budgets.

Given the administrative overhead associated with SLAs and the remaining questions as to their utility, one proposal is to eliminate SLAs in their current form and replace them with a simplified document defining the authority and responsibility for specific goods and services.

XXII. Funding Schedule for Enrollment Growth

The current budget model projects enrollment growth for the Fall, Winter, and Spring quarters in summer (July) and allocates 80% of that revenue to the Schools/Colleges for their fiscal year budgets. According to the schedule, in the spring of each fiscal year the central campus would "true-up" the funding for the original 80% allocation from the previous fall. **Based on our experience to date with revenue volatility at the College level, we developed a new approach to this enrollment growth funding allocation.** The new approach projects enrollment in July and allocates 50% of this funding to the Schools/Colleges. The first "true-up" is in November of the fiscal year based on fall enrollment, followed by a final "true-up" in the spring of the fiscal year.

XXIII. Graduate (Masters Level) Incentives and Lack of PhD Enrollment Incentives in Model

The current budget model is such that undergraduate education is more of the focus. Feedback continues to suggest that there are no incentives in the budget model for masters level programs, yet the model allocates 67% of total tuition to the College, which seems significant. Perhaps this is also a discussion about PhD level students, where the financial model is very different and not really an incentivized part of the current budget model. We need to identify ways to highlight masters growth in our implementation of the model and address priorities relative to PhD level students.

XXIV. Budget Related Activities During the Fiscal Year and Off-Cycle Campus Funding Requests

The process for off-cycle requests should be discussed to ensure that it is well integrated into the campus operating budget process, and does not become ad-hoc, with the exception of emergency/urgent issues that might arise. We also need to make sure we keep the Governance

Committee (and perhaps the Faculty Senate Planning and Budget Committee) updated on issues/priorities that come up during the year for which the institution makes commitments, base and/or one-time, and to integrate this information into the annual budget process (showing a full history for the cycle). Additionally, as was initiated for the FY19 cycle, we will continue to include presentations from the Chancellor's Office, P/EVC, and Planning and Budget organizations into the overall process.

In order to maintain a high level of transparency, a proposed update schedule would include an annual budget letter at the end of the process outlining all budget augmentations approved through the budget process as well as updates to the Governance Committee and Faculty Senate in October and February regarding funding decisions subsequent to the budget process.

XXV. New Budget Model but Still Some Old Budget Model Structures

The new budget model effectively allocated authority and responsibility for funds out to Schools and Colleges and other units. Centrally we retain a major liability for funding new salary and benefit adjustments, but it appears we also have other vestiges of the old budget system in play where central funding continues to be looked to for items like equity funding, funding of college level searches, Vice Chancellor searches, stipends for interim leadership positions, and a host of other allocations which may have been consistent with the old budget model, but do not appear consistent with the new budget model. (e.g. Faculty Searches - $350k/year; Executive Severance - $160k/year; Dean/VC Searches - $250k/year; other staff severances - $500k/year). Units with the funding authority should take on the responsibility for ad hoc items that support their priorities.

XXVI. Further Topics for Consideration

The following topics, while not necessarily directly linked to the budget model, have a broad impact on stakeholders across campus:

a. TA allocation model

Historically, central resources provided TA funding to the Schools and Colleges. However, under the new budget model, the center no longer provides specific TA funding to the academic units. Rather, Schools and Colleges are expected to fund TAs from their workload allocation based on the tuition allocation formula. Further, the current model does not take in account the differential TA ratios among the Schools and Colleges.

Adjusting the credit hour weighting in the tuition formula by discipline and level would have direct impact on the total funding to a School or College. Such additional funding could be allocated towards TAs by the School/College as needed and may be a method of addressing this concern among the academic units.

b. F&A distribution

The current F&A distribution policy does not include a specific policy for F&A return to centers. The Provost and VCPB are working with the Deans to include language regarding centers in the return policy.

It is also important to agree upon a policy for assumed uses of returned F&A at the unit level. Currently there is a policy for how much F&A is returned to units, but not the policy assumptions as to what is appropriate investment of these funds.

c. **Deferred maintenance funding**
The need for deferred maintenance across campus exceeds available funding. An approach for addressing deferred maintenance backlogs should be developed.

d. **Interdisciplinary and intercollegiate programs, including research and equipment, and centralized research facilities**
These activities are not currently supported in the model.

Key Question
How can they be fit in to the model with some incentives for such work?

e. **Financial Reporting**
Automated access to financial reporting to assist campus units in financial operations continues to be an issue and should be addressed. Broader campus reporting should also be considered.

Key Questions
Is there a plan for campus reporting?
How does COGNOS fit into campus reporting?
Are there other reporting solutions available?

f. **Professional development for CFAOs and Department level management**
Consideration should be given to developing a formal training process for this critical group of employees.

g. **Tracking of "permanent" positions/commitments funded on cash dollars**
This approach has been a culture in some areas of UCR, and it is important to have a way to identify and discuss these plans, before they become overall risks for the campus. It is important to allow us to centrally track and identify these potential risks as part of the budget process and discussions.

h. **Other data collected as part of the budget model**
Several other data elements have been suggested as being important parts of any campus budget model, to include faculty/student and faculty/staff ratios which could be used to support calibration efforts among academic units. Schools and Colleges would need different ratios depending on the type and level of instruction, but calibration would help to ensure that units have the appropriate funding to support their ratios. It would also be useful to have some comparative data on each School and College, with those they consider peers.

For service units, some comparative staffing/support metrics would be useful to collect and present as part of the budget process, so that their current funding levels could be balanced against what they are able to provide in terms of services to campus clients. Additionally, it would be useful to have more background information to present to the campus on the institutional budget – total revenue and expenditures and other general information along with some explanation of how the model works (budgeting 101 type background of important factual information).

i. **Graduate student fees vs services provided to them**
A concern has been raised about what fees graduate students now pay balanced against the services they receive, and whether this should be reviewed relative to the same analysis for undergraduate students.

j. **Technology Systems Investment Fund**
The campus currently does not have a funding strategy for campus IT systems. Refinements to the budget model should also consider funding for these high-impact systems, or at least identifying them in some formal way, perhaps as part of the Deferred Maintenance priority area, but with separate reporting.

UCR Decentralized Budget Model
Budget Model Refinement Process and Schedule
DRAFT 8/31/18

Transparency has been a key pillar throughout the transition to the new budget model and must remain a priority as refinements to the budget model are introduced and implemented. Robust consultations with key stakeholders regarding the issues raised in this document will enable transparent stakeholder engagement.

The Provost, Vice Chancellor for Planning and Budget (VCPB) and the Office of Financial Planning and Analysis (FP&A) will consult the following constituent groups throughout September/October 2018:

Constituent Type	Constituent Group		Venue
Leadership	Senior Leadership		Leadership Retreat
Academic Senate	FY15-18 Division Chairs, Committee on Planning and Budget Chairs and members*		Meeting
	Tier 1	Committee on Planning and Budget	Committee Meeting
		Committee on Research	Committee Meeting
		Committee on Physical Resources Planning	Committee Meeting
		Executive Council	Executive Council Meeting
	Tier 2	Committee on Educational Policy	Committee Meeting
		Graduate Council	Graduate Council Meeting
		Committee on Faculty Welfare	Committee Meeting
		Committee on Courses	Committee Meeting
	Tier 3	Committee on Diversity and Equal Opportunity	Committee Meeting
		Committee on Library and Information Technology	Committee Meeting
Faculty	Chairs and Directors		Chairs and Directors Meetings
	Faculty		Open Forum
Financial Administration	CFAOs		Monthly CFAO Meetings
Staff	Staff Assembly		Open Forum
Students	Student Leadership (Undergraduate/Graduate)		Student Leadership Meetings
	Diversity Council/VCSA/ Interim Dean of Students		Diversity Council Meeting

**Academic Senate has provided a list of these individuals to VC Bomotti.*

FP&A will also administer a survey in order to solicit feedback on the budget model from those that are unable to join the above targeted consultations. Survey recipients would include:

- Previous members of the Senate Committee for Planning and Budget;
- Chairs/Directors from each School/College;
- CFAOs;
- Campus-wide AVCs/Directors/FAOs/MSOs.

Key milestones for the budget model refinement process include:

Date	Milestone
September 10, 2018	VCPB presents budget model redesign document to Senior Leadership at the Leadership Retreat
November 1, 2018	Final draft of proposed refinements to the budget model available for public comment
December 15, 2018	Campus feedback on proposed refinements due to VCPB
January 1, 2019	Provost and VCPB send final recommendations of budget model refinements to Chancellor for consideration

The Provost and VCPB acknowledge that some of the proposed refinements to the budget model will be effective for the next budget process, while others may need to be transitioned over a longer timeframe.

Provost's Course Scheduling Workgroup
Policy Recommendations

1. **Clock time.** Classes start on the hour and half hour. 10 mins. earlier than now

   Explanation: Aligns UCR class schedules with administrative schedules, event schedules, employment schedules, and widely used scheduling conventions off-campus. Eliminates confusion about whether a meeting that is scheduled to begin at X:00 actually starts at X:00 or at X:10. Allows faculty and students 10 minutes of passing time to administrative meetings, rather than no time. Generally improves coordination both within and off campus. This recommendation could be implemented sooner than others, if desired.

2. **Course Scheduling Committee (CSC).** The CSC is appointed by and reports to the Provost. The CSC membership includes the Associate Provost, the Registrar, the Associate/Divisional Dean for Student Affairs from each of the undergraduate colleges/schools, and faculty and staff representatives. The CSC works with the Registrar to implement the campus scheduling policy and makes recommendations to the Provost on all aspects of course scheduling, including priority scheduling, departmentally controlled classroom space, final exam scheduling, special agreements with departments that claim unique scheduling needs, and changes to the campus scheduling policy.

   Explanation: Course scheduling should be responsive to evolving campus needs, and should be informed by broad input from stakeholders. This fosters communication and transparency, and provides a forum for inequities to be discussed and addressed. The Provost should develop a detailed charge for the CSC to refine its purview and help to focus its work. Among its first tasks, the CSC should undertake a review of existing special agreements and final exam scheduling. Ongoing coordination between the CSC and the Registrar's office will be essential.

3. **Prime time.** Prime hours (9 a.m.-3 p.m.) and allocations (up to 50% of all primary activities and up to 60% of all secondary activities) remain unchanged from current policy but are reviewed regularly by the CSC. An activity counts against a department's prime allocation if (1) it starts within the prime interval (9:00am – 2:59pm) and (2) it is not listed on the CSC's 1st-level priority list. As with the current policy, departmental compliance with these allocations is measured at the "Call" deadline. If a department is not in compliance at this time, it will not be included in the scheduling process until it comes into compliance.

   Explanation: Survey results show there will continue to be excess demand for these times. Although our scheduling software is sufficiently robust that we can avoid imposing limits on two-day meeting pattern requests, there remains a need for a mechanism to address excess demand during prime hours. Departmental allocations are currently used by UCR and other campuses, they are arguably an equitable approach, and they distribute the workload more broadly rather than concentrating it on limited Registrar's office staff. Departmental scheduling staff also know more about departmental scheduling needs than does the Registrar's office.

4. **Meeting patterns.** The standard meeting patterns for primary activities are shown in Appendix 10. Each scheduling requests for a primary activity should use a standard meeting pattern unless the CSC has approved a request for an alternative pattern (see below: approved exceptions), otherwise the activity will receive lowest scheduling priority among primary activities (see below: non-approved exceptions).

Explanation: Compared to the current policy, there is a much greater variety of standard meeting patterns and many more two-day per week meeting patterns to meet demand expressed by both students and faculty, while still allowing for maximum utilization (no unscheduled time blocks) between 8am and 8pm. Early morning and late evening patterns are likely to have lower utilization, but nonetheless are available if needed. Standard patterns also include single-day three-hour blocks (e.g. for film courses), three-day per week patterns, and four-day per week patterns (e.g. for language courses). The larger number of two-day patterns (along with no limit on departmental requests for two-day patterns) also increases contact time due to fewer passing periods during the day, and greatly reduces the likelihood that a faculty member will have to involuntarily switch a course from a two-day to a three-day pattern. More two-day patterns also can help facilitate the efficient scheduling of hybrid-online courses that may desire only one 80 minute meeting per week: two such courses could fill a standard two-day meeting pattern without negatively impacting utilization.

5. **Priority scheduling.**
    a. 1st priority (scaffolding): Primary activities determined by the CSC and Provost to be of significant importance for student progress to degree across multiple majors receive 1st-level priority, along with their associated secondary activities. These courses are scheduled by the CSC in standard meeting patterns and rarely change meeting patterns from one year to the next. 1st-level priority courses do not count against individual departmental prime time allocations due to the university service nature of these courses, and because departments have relatively less control over when these courses are scheduled. The CSC regularly reviews the list of courses with 1st-level priority, and their meeting patterns, and recommends changes. Secondary activities associated with these courses also have 1st-level scheduling priority.

    Explanation: Originally suggested by department chairs in CNAS, "scaffolding" creates a foundational framework of courses that are important across majors and thus to the university as a whole. These courses are scheduled first and deliberately arranged to avoid conflicts, thus placing an emphasis on student needs and progress to degree. This minimizes conflicts that would impact large numbers of students, and/or that could neither be foreseen nor resolved by a single department. It also allows for longer-term planning and greater predictability. Listed courses do not necessarily meet during prime time, but if a large number of them do, the common departmental prime time allocation may need to be reduced below 50%. Learning communities associated with "scaffolded" courses also receive 1st-level priority scheduling. The CSC also may recommend that a set of courses be treated as a block for scheduling purposes and given 1st-level priority. Each course in such a block also must follow a standard meeting pattern.

    b. 2nd priority (approved exceptions). Primary activities with approval from the CSC and Provost to use non-standard meeting patterns receive 2nd-level priority to promote higher overall utilization rates and to accommodate unusual and unavoidable circumstances. Such exceptions are rare and require strong justification. 2nd-level priority courses scheduled during prime hours count against individual departmental prime time allocations. The CSC regularly reviews the list of courses with 2nd-level priority, and their meeting patterns, and recommends changes.

    Explanation: The current policy gives lower priority to non-standard meeting pattern

requests. This policy change recognizes that some exceptions are necessary and should not be penalized in scheduling priority because they don't fit the standard mold. Coordinating exceptions also helps ensure efficient space utilization by bundling them together under this higher priority. Hybrid-online courses could be on the 2nd-level priority list. For approved non-standard meeting patterns that span across prime and non-prime hours, the CSC will determine whether the activity counts against departmental prime time allocations.

c. 3rd priority (standard). Most primary activities receive 3rd-level priority. Departmental requests for these activities must follow standard meeting patterns. Prior to this step, the grid of 1st-level and 2nd-level priority activities is shared with college enrollment managers to reduce the number of infeasible scheduling requests.

Explanation: Standard priority is similar to current policy. Most of these activities are scheduled using the Registrar's optimization software. Faculty time and location preferences are expressed through departmental requests, while the optimization step aims for high rates of room placement and seat utilization. Advanced notification of the 1st and 2nd-level priority scheduling results enables department staff to make well-informed scheduling requests for standard priority courses.

d. 4th priority (non-approved exceptions). Primary activity requests for non-standard meeting patterns that were not approved, and that were not re-submitted as standard requests, are scheduled into remaining rooms and meeting patterns. A 4th-level priority course counts against a department's prime time allocation if any of its meeting times starts during prime hours.

Explanation: Outstanding requests for non-standard meeting patterns are fit into rooms and times that remain available. This does not include requests from departments that were not in compliance with prime hour allocations at the time of the "Call." As is the current policy, each department must be in compliance before it will be included in the scheduling process.

e. 5th priority (secondary activities). All secondary activities not previously scheduled. These activities should align with standard meeting times to the greatest extent possible to promote coordination with primary activities and improve overall utilization.

Explanation: Most secondary activities receive the lowest priority in order to adequately prioritize primary activities. Because most secondary activities are 50 minutes in length, they should be scheduled on the hour.

6. **Room holds.** A department may keep a classroom assigned to an activity in "hold" status for up to two weeks prior to the first day of instruction. At that time, if an activity has not been placed into "active" status, the room will be released back to the Registrar. The Registrar will then work with departmental scheduling staff to reassign heavily impacted activities to larger rooms, and to address other outstanding scheduling needs.

Explanation: Departments currently may "hold" rooms past the start of classes, leading to underutilization. Often these holds occur during prime hours, yet are never filled. The proposed policy requires unutilized space to return to the Registrar's pool for assignment prior to the start

of classes. To avoid creating a cascade of conflicts, activities should be moved only within existing meeting patterns (i.e. rooms may be reassigned but meeting patterns should remain unchanged), unless another preferred solution can be identified with minimum disruption to other activities.

7. **Annual scheduling.** Initially, departments should develop, disseminate, and attempt to adhere to an annual (or possibly biennial) list of course offerings. Course scheduling will continue to be done quarterly to allow for more flexibility and last-minute adjustments as the proposed policy is brought online. As the proposed policy becomes more routine, the CSC should re-evaluate annual scheduling.

   Explanation: "Course offerings" refers to a departmental plan to offer courses in particular terms. "Course scheduling" refers to how the offered courses are scheduled into rooms and meeting patterns. Currently, course offerings often are published on a quarterly basis, so it is possible to plan ahead only for the next quarter. Our survey found that students would appreciate knowing anticipated course offerings over a longer time horizon for better planning around other activities (e.g. employment, study abroad, etc.). Additionally, UCR is adopting related planning tools (such as EduNav, a degree planning tool) that would benefit from having a longer-term view of anticipated course offerings. Although the workgroup sees merit in annual scheduling, we feel it is best to take up this issue again later for the reasons stated above.

8. **Guidelines and expectations.** These should be developed by the CSC to help department chairs address challenging issues at the department level rather than relying exclusively on the department scheduler or appealing to the Registrar's office or the CSC. Among these, the central role of the chair in helping to resolve conflicts should be clarified, rather than relying on unilateral engagement between faculty and scheduling staff.

   Explanation: We found that a variety of faculty and staff frustrations derive from the lack of clear expectations and workflows. The CSC should develop, publish, and communicate clear guidelines related to course scheduling that will help department chairs better manage the process and create greater efficiency through coordinated workflow. The process mapping exercise undertaken by the workgroup provides a good starting point for this effort. Guidelines also might be developed for how departments can manage and mitigate scheduling conflicts between graduate courses and undergraduate discussion sections (i.e. for teaching assistants).

9. **Transparency and coordination.** Information related to the scheduling process (for both centrally and departmentally controlled space) should be migrated to an open online system with secure login to promote greater transparency, host important policy documents, and realize the benefits of information sharing.

   Explanation: A secure online system is not a replacement for other modes of communication, but nonetheless establishes a good foundation for transparency, communication, and efficient workflow. In addition to scheduling staff, the system should be accessible by all faculty.

Provost's Course Scheduling Committee

Committee Charge

September 2018

The Provost and Executive Vice Chancellor (PEVC) is responsible for determining how campus space is allocated, including classroom space. Thus, the campus course scheduling policy also falls under the purview of the PEVC. Course scheduling should be responsive to evolving campus needs, and should be informed by broad input from stakeholders. Therefore, the PEVC relies on a Course Scheduling Committee (CSC) to foster communication and transparency, to provide a forum for concerns to be discussed and addressed, and to make recommendations to the PEVC on all aspects of course scheduling. This includes priority scheduling, final exam scheduling, special agreements with departments that have unique scheduling needs, exceptions and changes to the campus scheduling policy, and other related issues. The CSC also works closely with the Registrar to implement the campus scheduling policy on an ongoing basis. The CSC is comprised of the following individuals, most of whom are ex officio members:

- Associate Provost (Chair)
- Registrar
- Divisional Dean for Student Affairs, CNAS
- Associate Dean for Student Affairs, CHASS
- Associate Dean for Student Affairs, BCOE
- Associate Dean for the Undergraduate Program, Business
- Associate Dean for Undergraduate Education, GSOE
- Associate Dean, SPP
- Faculty Representatives (2), nominated by the Academic Senate
- Staff Representatives (2), enrollment managers from the large colleges

effective Fall 2019
-starts in February

Prototype Scaffolding Room Matrix for 201740 - Build 1

Pattern	Days/Times	SPR 1102	CHUNG 138	OLMH 1208	BRNH A125	UV THE8	HMNSS 1501	WAT 1000	MSE 116	PHY 2000	MSE 104	INTN 1020	LFSC 1500	BRNH B118	UV THE10	UV THE9	UNLH 1000
		100	105	110	130	135	138	170	284	288	293	300	303	329	334	416	570
B01	MW 8-9:20a		CS 010	BIOL 005A	MATH 005		MATH 007A	MATH 007B	MATH 009A		ANTH 002	SOC 002S		POSC 010			CHEM 001W
B02	TR 8-9:20a				MATH 009C		MATH 009B			PHYS 040A	MATH 004	MATH 007A					GEO 009
B10	MW 9:30-10:50a		CS 010		MATH 009A		MATH 007B	SOC 002F	BIOL 005A		ANTH 005						HIST 015
B03	TR 9:30-10:50a				MATH 009B				ENSC 001			HIST 020W				BUS 010	ETST 001
C01	MW 11a-12:20p		CS 010		MATH 007A				CHEM 001A		BIOL 005C		MATH 006B			POSC 020	HIST 010
C02	TR 11a-12:20p							PHIL 030E	CS 008	PHYS 040C	MATH 007A	CHEM 001A			HIST 020	BUS 010	ECON 003
C10	MW 12:30-1:50p	MATH 009C	CS 010				MATH 006A		SOC 010	MATH 004	CHEM 001A	MATH 009A	MCS 001			POSC 015	BIOL 005B
C03	TR 12:30-1:50p	MATH 009C					MATH 007A	PSYC 049	CS 008	PHYS 040A	MATH 005	MATH 009B		CHEM 001C	ETST 002	PHIL 001	ANTH 001
D01	MW 2-3:20p		CS 010		MATH 009A		MATH 009B	MATH 006A	BIOL 005C	CHEM 001A	POSC 005W	GSST 001S					ECON 002
D02	TR 2-3:20p							MATH 009B	CS 008	CHEM 001A	MATH 022			MATH 009A			PSYC 002
D10	MW 3:30-4:50p			MATH 009B			MATH 006A			CHEM 001C	BIOL 005B	PSYC 049	MATH 005				SOC 001
D03	TR 3:30-4:50p	MATH 009C		MATH 009B	MATH 007A		MATH 007B		ETST 003	PHYS 040C	EE 001A		BIOL 030				PSYC 001

Notes:

- The timeframe was expanded out of Prime hours to accomodate all necessary sections in UNLH 1000.

-Sections were generally kept as close to their current days, time, and rooms as as possible, except:
  a) when the original time was outside the 8am-5pm window considered, or
  b) the class conflicted with another section already on the matrix, or
  c) a class time shift caused two sections of the same course to occur at the same time, or
  d) when additional time options were needed for conflicting courses.

- Sections in UV THE9 & 10 have not had their meeting patterns shifted to account for offset time for the Village

- 99 sections, representing the large lectures on the courses list, were scheduled in this sample.

- This matrix is a first sample draft and proof-of-concept. Room utilization and overall scheduling has not been optimized in any way except to avoid or provide alternatives to known conflicts.

This is a sample build of a "scaffolding" matrix of high priority courses for Fall 2017. This is not a final build for actual scheduling but rather is representative of what such a matrix might look like.