

REBENCHING COMMITTEE CHARGE

March 18, 2011 DRAFT

President Yudof requests that the committee review and make recommendations for revising the methodology that distributes state general and other funds to the campuses through the UC Office of the President. This task reflects at least three developments.

1. The need as a system to evolve by

- giving campuses the autonomy they require to maintain and extend distinctive academic strengths while
- continuing multi-campus efforts that provide system and other efficiencies in areas of University and campus responsibility

2. The Funding Streams model in which campuses keep fee and other revenues that they generate and support the Office of the President and other university-wide programs and services through an annual assessment.

3. Questions about the appropriateness of the current formula used to distribute state general and other funds that flow to the campuses.

Convened jointly by the Provost and Executive Vice President for Academic Affairs, and the Executive Vice President for Business Operations, the committee will make recommendations to the President by December 2011:

1) Policy: Recommend a University policy for whether and how differences in funding of the campuses should be changed. The committee should consider positive and negative aspects and impacts of differences in historic funding levels among the campuses and of changes in funding levels going forward.

2) Principles: Recommend an appropriate formula(e) for determining levels of financial support across campuses. The committee should identify the fund sources that should be included, the functional and programmatic expenditure categories that should be included, the appropriate weighting of different populations of students, and any other considerations (such as disciplinary mix, age of campus facilities, academic preparation of student populations, and public service portfolios), that should be incorporated.

3) Implementation: In accordance with the recommended policy, propose the mechanism(s) by which existing differences in funding levels will be reduced. The committee should consider whether the existing base budget should be reallocated and/or whether amelioration of funding differentials should be conducted through increases in State funding as they become available, by determining a way and a period of time over which amelioration would occur, or both.

In conducting its work the committee will

- become familiar with current formulae for distribution of state funds to UC campuses;
- review other funding models used in higher public education in the US and abroad as appropriate; and

- consider whether funding can/should be allocated to reward campus accomplishments such as providing degrees, improve time-to-degree or graduation rates (e.g. for some student subgroups), etc. including appropriate measures of success.

Support of research and public service and their infrastructure will be considered as will maintenance of capital resources. In developing incentives, the committee may consider academic, administrative and energy efficiencies among other issues. Some key principles might be difficult to incentivize: interdisciplinary work, quality (of the learning environment and in research/creative activities), graduate study/research, and diversity of faculty. The committee should consider such UC priorities and whether the rebenching mechanism can/should address these and other important goals.

Attachment: Questions to Consider in Developing a Statistic for Comparing Funding Levels Across Campuses

- a. What fund sources should be included or excluded in the comparison statistic?
 - State General Funds
 - Tuition
 - Nonresident Supplemental Tuition
 - Professional Degree Supplemental Tuition
 - Indirect Cost Recovery
 - Other Sources
- b. What functional and programmatic expenditure categories should be included or excluded?
 - Health Sciences Instruction and Academic Support
 - Research
 - Public Service
 - Capital Facilities Program
 - Specific Activities
- c. How should different populations of students be weighted?
 - General Campus versus Health Sciences
 - Undergraduate versus Graduate
 - Graduate Academic versus Graduate Professional
 - Masters versus Doctoral
 - Lower Division versus Upper Division
- d. Other Considerations
 - Disciplinary Mix
 - Age of Facilities
 - Levels of Student Academic Preparation