September 28, 2009

TO: Kathleen Montgomery, Vice Chair, AGSM
    Dan Ozer, Secretary Parliamentarian, Psychology
    Richard Arnott, Economics
    Steve Axelrod, English
    Jay Farrell, Electrical Engineering
    Christine Gailey, Women’s studies
    John Ganim, English
    George Haggerty, English
    Dan Hare, Entomology
    David Herzebrger, Hispanic Studies
    Carol Lovatt, Botany and Plant Sciences
    Manuela Martins-Green, Cell Biology and Neuroscience
    Doug Mitchell, GSOE
    Len Mueller, Chemistry
    Vivian Nyitray, Religious studies
    John Trumble, Entomology
    Ameae Walker, Biomedical Sciences
    Albert Wang, Electrical Engineering
    Alan Williams, Earth Sciences
    Jose Wudka, Physics
    Marylynn Yates, Environmental Sciences
    TBD- Diversity
    TBC - AGSM

FR: Tony Norman, Chair
    Riverside Division

RE: Executive Council Agenda, September 28, 2009

This is to confirm the meeting of the Executive Council on Monday, September 28, 2009, at 1:00 p.m. to 3:00 p.m. in Room 145 University Office Building.
<table>
<thead>
<tr>
<th>Item</th>
<th>Enclosures</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I. Approval of the September 23, 2009 Agenda</strong></td>
<td>1 (pp. 1-3)</td>
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<tr>
<td><strong>II. Chancellor Timothy P. White</strong></td>
<td></td>
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<td><strong>III. Furlough Exchange Program</strong></td>
<td>2 (pp. 4-35)</td>
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<td>AVP David Bocian will discuss the Furlough Exchange Program which is currently out for review</td>
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<td><strong>IV. “Listening Forum,” of the President's Task force on Post-Employment Benefits</strong></td>
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<td>Dan Hare – Chair, Faculty Welfare</td>
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<tr>
<td><strong>V. Draft Mission Statement for the Senate</strong></td>
<td>3 (pp. 36)</td>
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<tr>
<td>Discuss and approve the Mission Statement for the Senate</td>
<td></td>
</tr>
<tr>
<td><strong>VI. Any Other Business</strong></td>
<td>4 (pp. 37)</td>
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<td>• Goals for Executive Council for 2009-2010</td>
<td></td>
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<td>• Addition of the Chair of the General Education Advisory Committee to the Executive Council</td>
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<td>• Second Annual Earthquake Shakeout – 10-15-09 - Oglesby</td>
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<td>• Suggestions to Faculty concerning a major medical emergency from a teaching perspective</td>
<td></td>
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<td>• Reorganization of some Senate committees</td>
<td></td>
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</tbody>
</table>
SEPTEMBER 30, 2009

Readopted for 1987-88
Readopted for 1988-89
Readopted for 1989-90
Readopted for 1990-91
Readopted for 1991-92
Readopted for 1992-93
Readopted for 1993-94
Readopted for 1994-95
Readopted for 1995-96
Readopted for 1996-97
Readopted for 1997-98
Readopted for 1998-99
Readopted for 1999-00
Readopted for 2000-01
Readopted for 2001-02
Readopted for 2002-03
Readopted for 2003-04
Readopted for 2004-05
Readopted for 2005-06
Readopted for 2006-07
Readopted for 2007-08
Readopted for 2008-09

The Executive Council at its meeting on -----, adopted the following conflict-of-interest statement:

If a member of the Executive Council believes that a conflict of interest exists for him/herself or for another person on the committee, that member should call the possible conflict to the attention of the chair. The chair will convene the committee except for the individuals with the possible conflict, and those present will decide by majority vote if a conflict exists. If the decision is affirmative, the individual with the conflict will leave the room during discussion of the conflicted matter and will not vote on that matter.

Anthony W. Norman, Chair
Q&A for Contract & Grant Officers Regarding the UC 2009-2010 Furlough Plan
September 16, 2009

This document was developed as a result of questions received by UCOP’s Research Policy Analysis and Coordination (RPAC) unit from campus Contract & Grant Offices with regard to the UC 2009-2010 Furlough Plan. It is meant to provide expanded guidance to campus Contract & Grant Offices with regard to implementation. None of the answers provided herein are meant to supersede previous official communications by the Office of the President, including:

- Furlough FAQs posted to the UCOP Budget News website (http://www.universityofcalifornia.edu/budget/?page_id=87)
- Memos from Interim Provost and Executive Provost Pitts (see attached memos of 08/26/2009 and 09/11/09 regarding Furlough Exchange Program)
- Furlough Q&A For Administrators (http://atyourservice.ucop.edu/administrators/employment/furlough/index.html)

1. What is UC’s Furlough Plan?

On July 16, 2009, the University of California Board of Regents approved a one-year systemwide Furlough Plan for UC employees, as a means of addressing the current extreme fiscal emergency faced by UC. Under the Plan, covered Faculty and staff will be required to take a specified number of “off-days” with no compensation (i.e., “furlough days.”).

The Plan applies to all full- and part-time UC employees, except for:

- Employees of the Lawrence Berkeley National Laboratory;
- Academic and staff employees whose pay is funded entirely by Extramural funds (see definition of “Extramural” below);
- The portion of an employee’s pay funded by Extramural funds (see definition of “Extramural” below);
- Student employees, including postdoctoral, graduate and undergraduate employees, health sciences trainees and postdoctoral fellows, except where those employees are exclusively represented by unions;
- Employees working reduced hours under the START program if their voluntary reduction is already equal to or exceeds the percent reduction for their respective pay band;
- Foreign national employees working pursuant to H-1B, H-2, H-3 and E-3 visas;
- Employees whose participation is precluded by law. (Employees with employment contracts that cannot be changed unilaterally by the University will be asked for a voluntary salary reduction appropriate for their pay band.)

Employees will receive the allotted number of furlough days specified by their salary band each month (details are available in the FAQs at http://www.universityofcalifornia.edu/budget/?page_id=87). Their pay will be reduced by a corresponding percentage in even increments each month during the 12-month Plan period. The furlough plan reduces the amount of time worked and not the full time equivalent annual salary. So while employees are earning less, their annual full time rate of pay remains unchanged.
There are no current official federal policies or guidelines on furlough plans, and there is no federal requirement to have furlough plans approved. The following are Q’s and A’s on the implementation of the UC Furlough Plan vis-à-vis Contracts and Grants.

2. What constitutes an “Extramural award?”

For the purposes of the Furlough Plan, Extramural awards include federal, State, other government or private contracts, grants, and cooperative agreements. Extramural awards include Inter-campus “subawards” received from a sister campus holding the prime Extramural award. The term “Extramural” does not include funds generated from indirect costs recovery, royalty sharing, and State general funds (199xx fund series).

In addition, for OP-administered programs, grants awarded to campuses from State appropriations in the 18xxx fund series are not subject to the Furlough Plan. For example, grants to campuses from the following programs are considered Extramural for the purpose of the Furlough Plan:

- California Subject Matter Projects (CSMP)
- Tobacco-Related Diseases Research Program (TRDRP)
- California Breast Cancer Research Program (CBCRP)
- California HIV/AIDS Research Program (CHRP)

Note that Office of the President employees paid on these same appropriations for the administration and management of these programs are subject to the furlough.

3. How does the Furlough Plan apply to Extramurally funded non-Faculty employees?

An employee whose salary is entirely funded from Extramural awards is automatically excluded from the Furlough Plan. An employee who is partially funded from Extramural awards is partially excluded from the Furlough Plan in proportion to the salary funded by Extramural awards. In other words, an employee who is 100% funded from a federal award will not have ANY furlough days. An employee who is paid 50% from Extramural funds will be required to take HALF the number of furlough days that would otherwise be required for someone in their salary band.

Non-Faculty staff employees, e.g. researchers, may increase or decrease their effort on Extramural awards, as long as there is compliance with established University and sponsor policies. However, furlough obligations would need to be recalculated each time there was a change in the effort charged to an Extramural award.

4. How does the Furlough Plan apply to Extramurally funded Faculty employees?

For the purpose of the Furlough Plan, “Faculty” includes full-time employees appointed to a professorial title or lecturers with Security of Employment and Faculty equivalents (as defined by Section 115-0 of the Academic Personnel Manual [http://www.ucop.edu/acadadv/acadpers/apm/apm-115.pdf]), who are not members of a Health
Sciences Compensation Plan. While the vast majority of faculty do not currently charge their extramural awards, those who are partially funded from Extramural awards are partially excluded from the Furlough Plan in proportion to the salary funded by Extramural awards.

Faculty who are subject to furlough days and wish to increase their effort on Extramural awards on what would otherwise be a furlough day, can participate in the Furlough Exchange Program (FEP). Typically such Faculty are not currently charging their Extramural awards for effort during the academic year.

The FEP has two options.

- The first option allows Faculty to participate in the FEP for the entire period of the furlough plan (September 1, 2009 – August 31, 2010). This option was described in a memo to Chancellors from Interim Provost and Executive Vice President Lawrence Pitts on 8/26/09 (“FEP 8/26/09 memo”), (see AA 09013 document attached).

- The second option allows Faculty to participate in the FEP on a partial year basis for entire academic term(s) (semester or quarter as applicable). The first potential period of participation would be the winter semester/quarter. This alternative to the FEP is described in an Addendum memo entitled Salary Exchange Program (FEP) Addendum Partial-Year Participation Option, dated 9/11/09 (see AA 09016 document attached).

Under either option:

- Faculty must completely offset their furlough for the elected participation period (i.e., Full year, Full Semester(s), Full Quarter(s)).
- Exchanged furlough days must be used during the participation periods, and may not be used for any other purpose, including additional consulting days and campus closures.
- During non-participation periods, Faculty would be subject to the Furlough Plan.
- There must be compliance with the award terms, and prior approvals must be sought when necessary. (Also see Q&A #8 below.)
- All charges to Extramural awards must be within the period of performance of the award, unless the sponsor allows the charging of pre-award expenditures.
- It is acceptable to use different Extramural awards, as some expire and others are awarded, but the entire elected participation period must be covered.
- Extramural awards and restricted gifts and endowments that can be used for research support may be used to qualify for the FEP.
- Faculty may not earn more than his/her normal annual pre-reduced compensation.

Campuses may set specific deadlines to elect to participate in the FEP, though generally, Faculty choosing the first option above would need to decide which existing Extramural awards they will use for the FEP by the close of the September 2009 payroll deadline (generally the 22nd of the month). There may also be well justified cases, in which payroll changes would be made by the October payroll deadline. Since Faculty choosing the second option cannot participate until the start of the winter quarter/semester, campuses should be ready to handle these elections on a timelier basis.

Per the FEP 8/26/09 memo, retroactive participation is not permitted. Please, note, however, that Faculty salary and benefits paid in July and August of 2009 are for 2009-10 academic year effort.
Therefore, under the full year FEP option, the transfer of charges for July/August salaries and benefits to the Extramural award for work conducted in September and October is allowed, as long as such action is compliant with award terms and the transfers are made within 120 days of incurrence, per University Business and Finance Bulletin, A-47, University Direct Costing Procedures, http://www.ucop.edu/ucophome/policies/bfb/a47.pdf.

Questions regarding the specific implementation of the FEP should be addressed to your campus Academic Personnel Office.

5. If a contract or grant includes voluntary committed or mandatory cost sharing in the form of effort paid by state funds, how will the Furlough Plan affect the award?

Because the Furlough Plan reduces the number of days an employee works, the amount available for cost sharing under these circumstances is being reduced. Therefore, under University Policy, awards that include academic year salary as all or part of mandatory cost sharing commitments may be used for the FEP only if alternate sources of cost sharing are identified, or prior approval for the reduction from the sponsor has been secured.

Any reduction of voluntary committed or mandatory cost sharing previously identified in the proposal budget or award must be approved by the sponsor agency.

6. Who is ultimately responsible for changes to the Extramural award?

The Principal Investigator (PI) is responsible for the technical, administrative, and fiscal management of a project. Neither the UC 2009-2010 Furlough Plan nor the Furlough Exchange Program shifts from the PI the ultimate responsibility for assuring that all costs are allowable, allocable, and consistent with the terms of an award from the Principal Investigator. Contract & Grant Offices will lend their expertise in making these determinations when requested to do so. The PI must endorse all charges to the grant including any adjustments to the budget.

7. What is the role of the campus Contract & Grant Office?

Contract & Grant Offices should be consulted if there are any questions about whether under a specific agreement prior approval from, or notification to the sponsor is required. Contract & Grant Offices should be consulted when there is any uncertainty as to the flexibility of the award terms.

8. When is prior sponsor approval required?

Any changes to the administration of an award that will adversely and significantly affect the scope of work require prior approval. Therefore, FEP charges or other furlough related rebudgeting that is so significant relative to the total budget that the result is a change in the scope of work, require notification to the sponsor. For National Institutes of Health awards, the determination is associated with rebudgeting of more than 25% of a budget line item.
The terms and conditions of any given contract or grant award govern the ability to *re-budget* project funds. Some awards are somewhat flexible, others are not. For instance, State awards do not generally allow for rebudgeting without prior approval. Many federal agencies issue grants and cooperative agreements under standard Research Terms and Conditions (RTC) based on Federal Demonstration Partnership (FDP) (expanded authorities.) Under this core set of administrative requirements prior agency approval for re-budgeting is typically not required. One notable exception is the NIH Kirschstein-NSRA grant program under which the PI must seek prior approval for any budget revision that impacts the scope of work or results in the re-budgeting of funds allotted for training allowances.

The following link provides guidance on prior approval requirements for FDP participating federal agencies: [http://www.nsf.gov/bfa/dias/policy/rtc/priorapproval.pdf](http://www.nsf.gov/bfa/dias/policy/rtc/priorapproval.pdf). Please note that other federal agencies may elect to use the RTC terms on selective awards to their research recipients. The terms and conditions of the award will indicate when RTC conditions apply.

When standard RTC apply and prior approval is not required to re-budget funds, departments may charge for additional effort, for either the PI or another Faculty member, without seeking additional agency or Contract & Grant Office approval if: 1) the PI agrees, 2) sufficient Extramural funds are available, 3) the Faculty member whose time would be increased on an Extramural award is a member of the project team, 4) the proposed change in the budget is compliant with OMB Circular A-21 as well as all other award terms and conditions, and 5) the change does not replace or reduce any committed cost shared Faculty effort on the project. Re-budgeting that results in a change in effort on the project must be reflected in agency progress reports and in the Personnel Activity Reports (PAR) or Effort Reporting systems.

For those federal agencies that have not adopted the standard RTC, and all non-federal agencies, the specific terms and conditions of the award will determine if re-budgeting to support additional effort is permissible and if sponsor prior approval is required. Contract & Grant Offices should be consulted for guidance.

It is also important to note that the National Science Foundation (NSF) limits the amount of salary for an individual investigator that can be charged to NSF in any 12-month period to no more than two-ninths of the investigator’s academic year salary. This limit includes summer salary received from all NSF-funded grants. For example, Faculty who elect to participate in the FEP cannot charge both their summer salary and academic year effort totaling more than two-ninths of their academic year salary absent prior case-by-case NSF approval. This interpretation of the NSF 2/9 salary restriction was recently confirmed by OP with the NSF Policy Office. If this policy determination changes, OP will notify campus Contract & Grant Offices.

As always, all charges to federal awards must conform to the tests of allowability of costs under OMB Circular A-21:

(a) they must be reasonable;

(b) they must be allocable to sponsored agreements, i.e., providing benefit to the grant or contract in proportion to the charge;

(c) they must be given consistent treatment appropriate to the circumstances;

(d) they must conform to any limitations or exclusions set forth in OMB Circular A-21 or in the sponsored award as to types or amounts of cost items.
9. Does the Furlough Plan affect the employee’s rate of pay that should be charged to an Extramural award?

No, the UC plan is a FURLOUGH (i.e., a reduction in paid work days), NOT a change in the annual full time RATE OF PAY. The rate of pay that an employee charges to State general funds or other funds during the year cannot be lower than the rate of pay that they charge to a federal award for summer salary. Therefore when estimating the cost of an employee’s time and effort to cover furloughed time, it is appropriate to use the employee’s 100% salary rate.

10. Since indirect cost recovery funds are from contracts and grants, can they be used to offset the furlough reduction?

No, indirect costs recovered from grants and contracts are reimbursement for expenses incurred by the University. Therefore, the recovered funds become University operating funds and cannot be used for the Furlough Exchange Program. Similarly, personnel supported from the indirect cost recovery funds are not exempt from the UC-wide Furlough Plan.

11. What effect does the Furlough Plan have on effort reporting?

Because the furlough requirement applies only to the state-funded portion of employees’ salaries, the payroll distribution displayed on effort reports of employees whose salaries are funded in part by Extramural awards will change, to reflect the increase in Extramural salary in relation to State funding. Care should be taken that charges to an Extramural award reflect actual effort dedicated to that award. It is critical for employees to recognize the percent of total relative effort contributed to contract and grant activities must be increased in order to be consistent with the shift in payroll distribution, whether or not their absolute effort has increased.

Two examples are listed below to show how effort adjustments would work in practice. Note that for illustration purposes, we have assumed a 40 hour work week, even though UC salaries are usually paid at a monthly, not hourly, rate.
Example #1

Staff Researcher Y has a 50% assignment on a federal grant and 50% on State funded activities. She will not use her furlough time to increase her federal effort. Therefore, her absolute time on the grant will remain the same. She is in the 8% furlough salary band.

The furlough effectively reduces the total amount of hours she has available to work on State activities. Yet her effort report must reflect how she spends her total reduced time, and must equal 100%.

Staff Researcher Y’s pre-furlough effort was:
50% on State funded activities
50% on the federal Grant

Her reduced weekly total hours available during the furlough are 38.4.

\[
\text{[40 hours x 50\% (20 hours) are subject to the 8\% furlough;}\]
\[
\text{20 hours x 8\% = 1.6 hrs of furlough time;}\]
\[
\text{40 hours - 1.6 hours = 38.4 hours].}\]

Her new effort during the furlough is:
48% on State funded activities \([(20 \text{ hrs} - 1.6)/38.4 = 48\%]\)
52% on federal Grant \([20 \text{ hrs}/38.4 \text{ hrs.} = 52\%].\)
Example #2

Staff Researcher X has a 50% assignment on a federal Extramural award and 50% on State funded activities. He is in the 8% furlough salary band. With his PI’s approval, he now wishes to increase his effort on the grant (which he can do by exchanging his furlough days for increased effort on the grant). For effort reporting purposes, this means there must be a corresponding decrease in his State funded activities because his total effort must equal 100%.

Staff Researcher X’s pre-furlough effort was:
50% on State funded activities
50% on the federal grant

His total hours available remain the same at 40 hours/week because he exchanged his 1.6 furlough hours/week for an increase in his grant effort.

His new effort during the furlough is:
46% on State funded activities [(20 hrs – 1.6 hrs)/40hrs. = 46%]
54% on the federal grant [(20 hrs. + 1.6 hrs.)/40hrs. = 54%]
Summary Points of Furlough Exchange Program Options
Please note that we just received revised tables from OP ten minutes ago and have not had the opportunity to review them. These notes and tables are based on the previously provided documentation. We will notify you of any major changes immediately.

Chancellor has the authority to:
- Select which programs, if any, the campus will participate in (Full FEP and/or Partial Year FEP).
- Grant exceptions for participation in the FEP program on a case by case basis, however, Junior Faculty may not use start-up (general) funds to participate in the Exchange program. This authority is limited to academic appointees.

Audit Implications:
- Audit and Compliance are issues at the forefront of these programs. OP is cautioning all campuses to be prepared for internal and external audits of any FEP programs they choose to adopt.
- Cost transfers will be required for all full-year FEP participants.
- If faculty enter into a FEP agreement and later have insufficient funds/work to complete the full exchange period for which they were approved. Errors in result in an overpayment would be considered a false claim and would increase the potential for audit and scrutiny for this and future grants.

Salary Implications:
- ALL Faculty will experience a reduction in pay in their September pay check. Even though the reduction may eventually be refunded for approved faculty who participate in a full-year FEP option (if offered), there is not time to process the required paperwork to prevent a September reduction.
- Faculty who participate in a partial year FEP will experience some degree of salary reduction, but are eligible to use unexchanged furlough days for OPA.

FEP Eligibility:
- OR and CE appointments are now eligible to participate in any FEP program that UCR chooses to implement.
- Partial Year FEP Participation. OP has approved a partial year Faculty Exchange Program which is a variation of the full year FEP. In addition to full year participation, the partial year FEP will allow for faculty participation in one or two quarters only.
- Full Year FEP Participation. Is an option for FY and AY faculty, including ladder rank equivalents. For AY participants it will require 3 months of cost transfers (July, August, September). For FY participants it will require 1 month of cost transfer (September 2009).

Time Tables for Various FEP Programs:
- Full-year FEP participation is:
  - Between July 1, 2009 through June 30, 2010 for AY and
  - between September 1, 2009 and August 31, 2010 for FY faculty.
- Partial-Year FEP participation is:
  - AY Faculty can elect to participate in either the Winter Quarter pay period (Nov – February) and/or Spring Quarter pay period (March-June).
  - FY faculty can participate in any or all fiscal year quarters: \((Q2 = Oct-Dec) (Q3= Jan-March) \) and/or \((Q4= April-June)\).
- Full-Year FEP participants and Partial-Year FEP participants who exchange furlough days during periods of Campus closure agree to work during campus closure days.

Workload implications:
- Managing the program will increase the workload for staff responsible for payroll, academic personnel and organizational budgets.
Table 1
Academic Personnel Affected by the Furlough/Salary Reduction Plan
Who ARE NOT participating in the Furlough Exchange Program (FEP)

<table>
<thead>
<tr>
<th>Salary Band</th>
<th>Total Annual Compensation¹</th>
<th>Approximate Salary Reduction²</th>
<th>AY Maximum Faculty Furlough Days³ &amp; Compensated OPA Eligible Days⁴</th>
<th>FY Maximum Faculty Furlough Days³ &amp; Compensated OPA Eligible Days⁴</th>
<th>Non Senate Academics and Full-time Faculty Administrative Appointees⁵</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>&lt;= $40,000</td>
<td>4%</td>
<td>7</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>2</td>
<td>$40,001 - $46,000</td>
<td>5%</td>
<td>9</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>3</td>
<td>$46,001 - $60,000</td>
<td>6%</td>
<td>10</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td>4</td>
<td>$60,001 - $90,000</td>
<td>7%</td>
<td>12</td>
<td>16</td>
<td>18</td>
</tr>
<tr>
<td>5</td>
<td>$90,001 – 180,000</td>
<td>8%</td>
<td>14</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>6</td>
<td>$180,001 - $240,000</td>
<td>9%</td>
<td>15</td>
<td>22</td>
<td>24</td>
</tr>
<tr>
<td>7</td>
<td>More than $240,000</td>
<td>10%</td>
<td>17</td>
<td>24</td>
<td>26</td>
</tr>
</tbody>
</table>

¹ TOTAL ANNUAL COMPENSATION = BASE SALARY + OFFSCALE AMOUNT + STIPENDS on January 1, 2009 – The Regents’ Item that established the Furlough/Salary Reduction program says that the salary reduction percentage will be based on the base salary, including off scales and stipends.

² SALARY REDUCTION AMOUNT = SALARY REDUCTION PERCENTAGE x AMOUNT OF SALARY PAID WITH FUNDS THAT ARE SUBJECT TO THE REDUCTION

³ NUMBER OF FURLOUGH DAYS = SALARY BAND x PERCENTAGE OF SALARY PAID WITH FUNDS THAT ARE SUBJECT TO THE REDUCTION

⁴ ADDITIONAL COMPENSATED OPA ELIGIBLE DAYS = Number of Furlough Days that may be used as extra Outside Professional Activity (OPA). These must be reported.

⁵ FULL-TIME FACULTY ADMINISTRATIVE APPOINTEES = Divisional Deans, Associate Deans, Vice Provosts, and certain Directors. Does not apply to SMG.

Example 1.1: An Academic Year (AY) faculty member had a total annual compensation of $85,000 on January 1, 2009 and is paid 100% from funds that are subject to the reduction. The salary and furlough implications are:

- The salary band is #4, the band for salaries between $60,001 and $90,000.
- The approximate salary reduction percentage is 7%.
- The approximate annual amount of the salary reduction is $5,950. \($85,000 \times 7\%\).
- The number of furlough days is 12. Faculty furlough days must be reported monthly at the department level. Timesheets will be issued for this purpose.
- Twelve (12) additional compensated OPA days are available, as stipulated in UCOP Guidelines. Additional compensated OPA days used will require annual reporting.

References:
1. Guidelines regarding Faculty use of Furlough Days for Outside Professional Activity (OPA) are outlined in UCOP Document AA09012. (9-15-09)
2. Guidelines regarding the Faculty Exchanged Program are outlined in UCOP Document AA09013.
**Example 1.2:** A Fiscal Year (FY) faculty member had a total annual compensation of $175,000 on January 1, 2009 and the salary is paid 100% from funds that are subject to the reduction. The salary and furlough implications are:

- The **salary band** is #5, the band for salaries between $90,001 and $180,000.
- The approximate **salary reduction percentage** is 8%.
- The approximate **annual amount of the salary reduction** is $14,000. \( \{175,000 \times 8\%\} \)
- The number of **furlough days** is **19**. Faculty furlough days must be **reported monthly** at the department level. Timesheets will be issued for this purpose.
- Nineteen (19) additional **compensated OPA days** are available, as stipulated in UCOP Guidelines. Additional compensated OPA days used will require annual reporting.

**Example 1.3:** A faculty member is appointed 100% in a 12 month non-SMG administrative title had a total annual compensation of $200,000 on January 1, 2009 and the salary is paid 100% from funds that are subject to the reduction. The salary and furlough implications are:

- The **salary band** is #6, the band for salaries between $180,001 and $240,000.
- The approximate **salary reduction percentage** is 9%.
- The approximate **annual amount of the salary reduction** is $18,000. \( \{200,000 \times 9\%\} \)
- The number of **furlough days** is **24**. Furlough days must be **reported monthly** at the department level. Timesheets will be issued for this purpose.
- Twenty-four (24) additional **compensated OPA days** are available, as stipulated in UCOP Guidelines. Additional compensated OPA days used will require annual reporting.

**Example 1.4:** An Academic Coordinator had a total annual compensation of $60,000 on January 1, 2009 and the salary is paid 60% from funds that are subject to the reduction and 40% from funds that are excluded from the reduction. The salary and furlough implications are:

- The **salary band** is #3, the band for salaries between $46,001 and $60,000.
- The approximate **salary reduction percentage** is 6%.
- The approximate **annual amount of the salary reduction** is $2,160. \( \{60,000 \times 60\% \times 6\%\} \)
- The number of **furlough days** is **9.6**. \( \{16 \times 60\%\} \) Accrued furlough days are prorated based on the percentage of the salary that is paid with funds that are subject to the reduction, in this case, 60%. Furlough days must be **reported monthly** at the department level. Timesheets will be issued for this purpose.
- This title is **not eligible for OPA** days.

Examples 1.1 through 1.4 are also represented in a tabular format in Table 1A

References:
1. Guidelines regarding Faculty use of Furlough Days for Outside Professional Activity (OPA) are outlined in UCOP Document AA09012. (9-15-09)
2. Guidelines regarding the Faculty Exchanged Program are outlined in UCOP Document AA09013.
<table>
<thead>
<tr>
<th>Example 1.1</th>
<th>Example 1.2</th>
<th>Example 1.3</th>
<th>Example 1.4</th>
</tr>
</thead>
<tbody>
<tr>
<td>AY Faculty Member Affected by the Furlough Salary Reduction Plan Who IS NOT Participating in the Furlough Exchange Program</td>
<td>FY Faculty Member Affected by the Furlough Salary Reduction Plan Who IS NOT Participating in the Furlough Exchange Program</td>
<td>Faculty member appointed in 12 month non-SMG administrative title. Affected by the Furlough Salary Reduction Plan</td>
<td>Academic Coordinator. Affected by the Furlough Salary Reduction Plan</td>
</tr>
</tbody>
</table>

### Table 1A

<table>
<thead>
<tr>
<th>Annual Compensation As of January 1, 2009</th>
<th>$85,000</th>
<th>$175,000</th>
<th>$200,000</th>
<th>$60,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Band</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>Approximate Salary Reduction Percentage</td>
<td>7%</td>
<td>8%</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Percent Salary Paid with Funds Included in Reduction</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>60%</td>
</tr>
<tr>
<td>Amount of Salary Paid with Funds Included in Reduction</td>
<td>$85,000</td>
<td>$175,000</td>
<td>$200,000</td>
<td>$36,000</td>
</tr>
<tr>
<td>Percentage of Salary Excluded from Plan</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>40%</td>
</tr>
<tr>
<td>Approximate Amount of Salary Reduction</td>
<td>$5,950</td>
<td>$14,000</td>
<td>$18,000</td>
<td>$2160</td>
</tr>
<tr>
<td>Appointment Type</td>
<td>AY Faculty</td>
<td>FY Faculty</td>
<td>Senate Faculty Administrator</td>
<td>Non Senate Academic</td>
</tr>
<tr>
<td>Maximum Furlough Days</td>
<td>12</td>
<td>19</td>
<td>24</td>
<td>9.6</td>
</tr>
<tr>
<td>Maximum Number of Additional OPA Compensated Days</td>
<td>12</td>
<td>19</td>
<td>24</td>
<td>Not Eligible</td>
</tr>
<tr>
<td>Faculty Exchange Program Approved Participant</td>
<td>No</td>
<td>No</td>
<td>Not Eligible</td>
<td>Not Eligible</td>
</tr>
<tr>
<td>Number of Furlough Days Forfeited/Exchanged</td>
<td>Does Not Apply</td>
<td>Does Not Apply</td>
<td>Does Not Apply</td>
<td>Does Not Apply</td>
</tr>
<tr>
<td>Approximate Amount of Salary Reduction Eligible for Exchange</td>
<td>Does Not Apply</td>
<td>Does Not Apply</td>
<td>Does Not Apply</td>
<td>Does Not Apply</td>
</tr>
</tbody>
</table>

References:
1. Guidelines regarding Faculty use of Furlough Days for Outside Professional Activity (OPA) are outlined in UCOP Document AA09012. (9-15-09)
2. Guidelines regarding the Faculty Exchanged Program are outlined in UCOP Document AA09013.
Table 2: Faculty Affected by the Furlough/Salary Reduction Plan  
Who ARE Participating in the FULL YEAR Furlough Exchange Program

<table>
<thead>
<tr>
<th>Salary Band</th>
<th>Total Annual Compensation (Base + Off-Scale+ Stipends)</th>
<th>Approximate Salary Exchange %</th>
<th>AY Required Furlough Exchange Days (Furlough Days are Forfeited) Starts July 1, 2009 Ends June 30, 2010 4 months cost transfers required</th>
<th>FY Required Furlough Exchange Days (Furlough Days are Forfeited) Starts September 1, 2009 Ends August 31, 2010 1 month cost transfers required</th>
<th>AY &amp; FY Compensated OPA Eligible Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>&lt;= $40,000</td>
<td>4%</td>
<td>7</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>$40,001 - $46,000</td>
<td>5%</td>
<td>9</td>
<td>12</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>$46,001 - $60,000</td>
<td>6%</td>
<td>10</td>
<td>14</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>$60,001 - $90,000</td>
<td>7%</td>
<td>12</td>
<td>16</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>$90,001 – 180,000</td>
<td>8%</td>
<td>14</td>
<td>19</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>$180,001 - $240,000</td>
<td>9%</td>
<td>15</td>
<td>22</td>
<td>0</td>
</tr>
<tr>
<td>7</td>
<td>More than $240,000</td>
<td>10%</td>
<td>17</td>
<td>24</td>
<td>0</td>
</tr>
</tbody>
</table>

The Furlough Exchange Program (FEP) allows certain faculty who are subject to the furlough program to devote extra effort to approved extramurally funded projects in exchange for the furlough time they would be accruing. Appointees may charge an equivalent amount of effort to extramural funding sources. The table and examples below show the salary and furlough implications of faculty who are participating in the full year furlough exchange program. This program is subject to a number of restrictions and requires prior authorization.

Example 2.1: If an Academic Year (AY) faculty member had a total annual compensation of $85,000 on January 1, 2009 and is paid 100% from funds that are subject to the reduction, then the salary and furlough implications are as follows:

- The salary band is #4, the band for salaries between $60,001 and $90,000.
- The approximate salary exchange percentage is 7%.
- The approximate annual amount of the salary reduction covered by extramural funding, restricted gifts or endowments under the FEP is $5,250. ($85,000*7%). Under the FEP, faculty may charge an equivalent amount of effort to extramural funding in effect eliminating the salary reduction keeping their annual compensation at 100%, excluding stipends.
- Faculty furlough days are exchanged (forfeited). A total of 12 furlough days in AY 2009-2010 are forfeited. Under the FEP, the faculty member will devote 12 days of extra effort to approved extramurally funded projects in exchange for the furlough time they otherwise would accrue.
- The faculty member is not eligible for additional compensated OPA days as stipulated in UCOP Guidelines.

References:
1. Guidelines regarding Faculty use of Furlough Days for Outside Professional Activity (OPA) are outlined in UCOP Document AA09012. 9-15-09
2. Guidelines regarding the Faculty Exchanged Program are outlined in UCOP Document AA09013.
Example 2.2: If a Fiscal Year (FY) faculty member had a total annual compensation of $175,000 on January 1, 2009 is paid 100% from funds that are subject to the reduction, then the salary and furlough implications are below.

- The salary band is #5, the band for salaries between $90,001 and $180,000.
- The approximate salary exchange percentage is 8%.
- The approximate annual amount of the salary reduction covered by extramural funding restricted gifts or endowments under the FEP is $14,000. \( \left( \frac{175,000 \times 8\%}{100} \right) \).

Under the FEP, faculty may charge an equivalent amount of effort to extramural funding in effect eliminating the salary reduction keeping their annual compensation at 100%, excluding stipends.

- Faculty furlough days are exchanged (forfeited). A total of 19 furlough days are forfeited in AY 2009-2010. Under the FEP, the faculty member will devote 19 days of extra effort to approved extramurally funded projects in exchange for the furlough time they otherwise would accrue.
- The faculty member is not eligible for additional compensated OPA days as stipulated in UCOP Guidelines.

Examples 2.1-2.2 are also represented in a tabular format in Table 2A.

References:
1. Guidelines regarding Faculty use of Furlough Days for Outside Professional Activity (OPA) are outlined in UCOP Document AA09012. 9-15-09
2. Guidelines regarding the Faculty Exchanged Program are outlined in UCOP Document AA09013.
Table 2A

<table>
<thead>
<tr>
<th>Annual Compensation As of January 1, 2009</th>
<th>Example 2.1 AY Faculty Member Affected by the Furlough Salary Reduction Plan Who IS Participating in the Furlough Exchange Program</th>
<th>Example 2.2 FY Faculty Member Affected by the Furlough Salary Reduction Plan Who IS Participating in the Furlough Exchange Program</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$85,000</td>
<td>$175,000</td>
</tr>
<tr>
<td>Salary Band</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Approximate Salary Reduction/Exchange Percentage</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Percent Salary Paid with Funds Included in Reduction</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Amount of Salary Paid with Funds Included in Reduction</td>
<td>$85,000</td>
<td>$175,000</td>
</tr>
<tr>
<td>Percentage of Salary Excluded from Plan</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Approximate Amount of Salary Reduction</td>
<td>$5,950</td>
<td>$14,000</td>
</tr>
<tr>
<td>Appointment Type</td>
<td>AY Faculty</td>
<td>FY Faculty</td>
</tr>
<tr>
<td>Maximum Furlough Days</td>
<td>12</td>
<td>19</td>
</tr>
<tr>
<td>Maximum Number of Additional OPA Compensated Days</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Faculty Exchange Program Approved Participant</td>
<td>Yes July 1, 2009- June 30, 2010</td>
<td>Yes Sept. 1, 2009 to Aug.31, 2010</td>
</tr>
<tr>
<td>Number of Furlough Days Forfeited/Exchanged</td>
<td>12</td>
<td>19</td>
</tr>
<tr>
<td>Approximate Amount of Salary Reduction Eligible for Exchange</td>
<td>$5,950</td>
<td>$14,000</td>
</tr>
</tbody>
</table>

References:
1. Guidelines regarding Faculty use of Furlough Days for Outside Professional Activity (OPA) are outlined in UCOP Document AA09012. 9-15-09
2. Guidelines regarding the Faculty Exchanged Program are outlined in UCOP Document AA09013.
### Table 3

#### Academic-Year Faculty Who Qualify for Partial-Year Furlough Exchange Program

<table>
<thead>
<tr>
<th>Salary Band</th>
<th>Total Annual Compensation(^1) (Base + Off-Scale + Stipend)</th>
<th>Approximate Salary Exchange %</th>
<th>Total Furlough Days Accrued</th>
<th>AY Furlough Days Exchanged (1 QRT Only)</th>
<th>AY Furlough Days via Salary Reduction / Additional Compensated OPA Eligible Days</th>
<th>AY Furlough Days Exchanged (2 QRTs Only)</th>
<th>AY Furlough Days via Salary Reduction / Additional Compensated OPA Eligible Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>&lt;= $40,000</td>
<td>4%</td>
<td>7</td>
<td>2 @ 6.0%</td>
<td>5</td>
<td>5 @ 5.00%</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>$40,001 - $46,000</td>
<td>5%</td>
<td>9</td>
<td>3 @ 7.5%</td>
<td>6</td>
<td>6 @ 6.25%</td>
<td>3</td>
</tr>
<tr>
<td>3</td>
<td>$46,001 - $60,000</td>
<td>6%</td>
<td>10</td>
<td>3 @ 9.0%</td>
<td>7</td>
<td>7 @ 7.50%</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>$60,001 - $90,000</td>
<td>7%</td>
<td>12</td>
<td>4 @ 10.5%</td>
<td>8</td>
<td>8 @ 8.75%</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>$90,001 – 180,000</td>
<td>8%</td>
<td>14</td>
<td>5 @ 12.0%</td>
<td>9</td>
<td>9 @ 10.00%</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>$180,001 - $240,000</td>
<td>9%</td>
<td>15</td>
<td>5 @ 13.5%</td>
<td>10</td>
<td>10 @ 11.25%</td>
<td>5</td>
</tr>
<tr>
<td>7</td>
<td>More than $240,000</td>
<td>10%</td>
<td>17</td>
<td>6 @ 15.0%</td>
<td>11</td>
<td>11 @ 12.50%</td>
<td>6</td>
</tr>
</tbody>
</table>

\(^1\) TOTAL ANNUAL COMPENSATION = BASE SALARY + OFFSCALE AMOUNT on January 1, 2009 – The Regents’ Item that established the Furlough/Salary Reduction program says that the salary reduction percentage will be based on the base salary, including off scales and stipends.

\(^2\) ADDITIONAL COMPENSATED OPA ELIGIBLE DAYS = Number of Furlough Days that may be used as extra Outside Professional Activity (OPA). These must be reported.

**Example 3.1:** An Academic Year (AY) faculty member had a total annual compensation of $100,000 on January 1, 2009 and is paid 100% from funds that are subject to the reduction. The Research Office has verified that the faculty member has grants that will permit furlough exchange for Winter or Spring Quarter 2010.

- The **salary band** is #5, the band for salaries between $90,001 and $180,000.
- The approximate **furlough exchange percentage** is 8% per month for 12 months, beginning September 1, 2009.
- The total salary reduction without the FEP is $8,000 [ $100,000*8%].
- The total furlough exchange off-set is $4,000 [ (($100,000/12 months) *10 actual reduction period)) * 12% furlough reduction % * (4 pay periods/10 months) ].
- The approximate **annual amount of the salary reduction** that the faculty member will experience is **$4,000**. [ $8,000 total reduction - $4,000 exchanged]
- The number of **furlough days to be exchanged** is 5.
- The faculty member is eligible to take 9 additional compensated OPA days. [ 14 total furlough days minus 5 exchanged days ]
- The faculty member will not have any salary reduction, furlough day accrual or furlough day usage after June 30, 2010.

References:
1. Guidelines regarding Faculty use of Furlough Days for Outside Professional Activity (OPA) are outlined in UCOP Document AA09012.
2. Guidelines regarding the Faculty Exchanged Program are outlined in UCOP Document AA09013.
Example 3.2: An Academic Year (AY) faculty member had a total annual compensation of $100,000 on January 1, 2009 and is paid 100% from funds that are subject to the reduction. The Research Office has verified that the faculty member has grants that will permit furlough exchange for Winter and Spring Quarters 2010.

- The **salary band** is #5, the band for salaries between $90,001 and $180,000.
- The approximate **furlough exchange percentage** is 8% per month for 12 months, beginning September 1, 2009.
- The total salary reduction without the FEP is $8,000 [ $100,000*8%].
- The total furlough exchange off-set is $6,667 [ ($100,000/12 months) * 10% * (8 pay periods/10 months)].
- The approximate **annual amount of the salary reduction** that the faculty member will experience is **$1,333**. [ $8,000 total reduction - $6,667 exchanged]
- The number of **furlough days to be exchanged** is 9.
- The **faculty member is eligible to take 5 additional compensated OPA days**. [ 14 total furlough days minus 9 exchanged days ]
- The **faculty member will not have any salary reduction, furlough day accrual or furlough day usage after June 30, 2010.**
### Table 4
Fiscal Year (FY) Faculty Who Qualify for Partial-Year Furlough Exchange Program

<table>
<thead>
<tr>
<th>Salary Band</th>
<th>Total Annual Compensation(^1) (Base + Off-Scale + Stipend)</th>
<th>Appx. Salary Exchange %</th>
<th>Total Furlough Days Accrued</th>
<th>FY Furlough Days Exchanged (1 QRT Only)</th>
<th>FY Furlough Days with Salary Reduction / Additional Comp. OPA(^2) Eligible Days</th>
<th>FY Furlough Days Exchanged (2 QRTs)</th>
<th>FY Furlough Days with Salary Reduction / Additional Comp. OPA(^2) Eligible Days</th>
<th>FY Furlough Days Exchanged (3 QRTs)</th>
<th>FY Furlough Days with Salary Reduction / Additional Comp. OPA(^2) Eligible Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>&lt;= $40,000</td>
<td>4%</td>
<td>10</td>
<td>2.50</td>
<td>7.50</td>
<td>5.00</td>
<td>5.00</td>
<td>7.50</td>
<td>2.50</td>
</tr>
<tr>
<td>2</td>
<td>$40,001 - $46,000</td>
<td>5%</td>
<td>12</td>
<td>3.00</td>
<td>9.00</td>
<td>6.00</td>
<td>6.00</td>
<td>9.00</td>
<td>3.00</td>
</tr>
<tr>
<td>3</td>
<td>$46,001 - $60,000</td>
<td>6%</td>
<td>14</td>
<td>3.50</td>
<td>10.50</td>
<td>7.00</td>
<td>7.00</td>
<td>10.50</td>
<td>3.50</td>
</tr>
<tr>
<td>4</td>
<td>$60,001 - $90,000</td>
<td>7%</td>
<td>16</td>
<td>4.00</td>
<td>12.00</td>
<td>8.00</td>
<td>8.00</td>
<td>12.00</td>
<td>4.00</td>
</tr>
<tr>
<td>5</td>
<td>$90,001 – $180,000</td>
<td>8%</td>
<td>19</td>
<td>4.80</td>
<td>14.20</td>
<td>8.50</td>
<td>8.50</td>
<td>14.20</td>
<td>4.80</td>
</tr>
<tr>
<td>6</td>
<td>$180,001 - $240,000</td>
<td>9%</td>
<td>22</td>
<td>5.50</td>
<td>16.50</td>
<td>11.00</td>
<td>11.00</td>
<td>16.50</td>
<td>5.50</td>
</tr>
<tr>
<td>7</td>
<td>More than $240,000</td>
<td>10%</td>
<td>24</td>
<td>6.00</td>
<td>18.00</td>
<td>12.00</td>
<td>12.00</td>
<td>18.00</td>
<td>6.00</td>
</tr>
</tbody>
</table>

\(^1\) TOTAL ANNUAL COMPENSATION = BASE SALARY + OFFSCALE AMOUNT on January 1, 2009 – The Regents’ Item that established the Furlough/Salary Reduction program says that the salary reduction percentage will be based on the base salary, including off scales and stipends.

\(^2\) ADDITIONAL COMPENSATED OPA ELIGIBLE DAYS = Number of Furlough Days that may be used as extra Outside Professional Activity (OPA). These must be reported.

**Example 4.1:** An Fiscal Year (FY) faculty member had a total annual compensation of $100,000 on January 1, 2009 and is paid 100% from funds that are subject to the reduction. The Research Office has verified that the faculty member has grants that will permit furlough exchange for one quarter between 9/01/09 and 06/30/10.

- The **salary band** is #5, the band for salaries between $90,001 and $180,000.
- The approximate **furlough exchange percentage** is 8% per month for 12 months, beginning September 1, 2009 and ending August 31, 2010.
- The total salary reduction without the FEP is $8,000 ([$100,000*8%].
- The total furlough exchange off-set is $2,000 ([$100,000/12 months]*8% furlough reduction % * 3 pay periods (one fiscal quarter)).
- The approximate **annual amount of the salary reduction** that the faculty member will experience is $6,000. ($8,000 total reduction - $2,000 exchanged)
- The number of **furlough days to be exchanged** is 4.8.
- The **faculty member is eligible to take 14.20 additional compensated OPA days.** [19 total furlough days minus 4.80 exchanged days]

References:
1. Guidelines regarding Faculty use of Furlough Days for Outside Professional Activity (OPA) are outlined in UCOP Document AA09012. 9-15-09
2. Guidelines regarding the Faculty Exchanged Program are outlined in UCOP Document AA09013.
**Example 4.2:** An *Fiscal Year (FY)* faculty member had a total annual compensation of $100,000 on January 1, 2009 and is paid 100% from funds that are subject to the reduction. The Research Office has verified that the faculty member has grants that will permit furlough exchange for two quarters between 9/01/09 and 06/30/10.

- The *salary band* is #5, the band for salaries between $90,001 and $180,000.
- The approximate *furlough exchange percentage* is 8% per month for 12 months, beginning September 1, 2009 and ending August 31, 2010.
- The total salary reduction without the FEP is $8,000 [($100,000*8%)].
- The total furlough exchange off-set is $4,000 [((100,000/12 months)* 8% furlough reduction % * 6 pay periods (two fiscal quarters)].
- The approximate *annual amount of the salary reduction* that the faculty member will experience is $4,000. [$8,000 total reduction - $4,000 exchanged]
- The number of *furlough days to be exchanged* is 8.50.
- The faculty member is eligible to take 8.50 additional *compensated OPA days*. [19 total furlough days minus 8.50 exchanged days]

**Example 4.3:** An *Fiscal Year (FY)* faculty member had a total annual compensation of $100,000 on January 1, 2009 and is paid 100% from funds that are subject to the reduction. The Research Office has verified that the faculty member has grants that will permit furlough exchange for three quarters between 9/01/09 and 06/30/10.

- The *salary band* is #5, the band for salaries between $90,001 and $180,000.
- The approximate *furlough exchange percentage* is 8% per month for 12 months, beginning September 1, 2009 and ending August 31, 2010.
- The total salary reduction without the FEP is $8,000 [($100,000*8%)].
- The total furlough exchange off-set is $6,000 [((100,000/12 months)* 8% furlough reduction % * 9 pay periods (three fiscal quarters)].
- The approximate *annual amount of the salary reduction* that the faculty member will experience is $2,000. [$8,000 total reduction - $6,000 exchanged]
- The number of *furlough days to be exchanged* is 14.20.
- The faculty member is eligible to take 4.80 additional *compensated OPA days*. [19 total furlough days minus 14.20 exchanged days]

References:

1. Guidelines regarding Faculty use of Furlough Days for Outside Professional Activity (OPA) are outlined in UCOP Document AA09012.
2. Guidelines regarding the Faculty Exchanged Program are outlined in UCOP Document AA09013.
Furlough Exchange Program (FEP)

August 26, 2009

Description:

This program allows academic employees who are subject to the furlough program to devote extra effort to extramurally funded projects in exchange for the furlough time they would be accruing. Appointees may charge an equivalent amount of effort to extramural funding, provided this is permissible with the granting agency and the terms of the extramural award as determined in consultation with the campus Sponsored Projects Office (SPO). All charges must remain in compliance with Office of Management and Budget (OMB) Circular A-21. Restricted gifts and endowments that can be used for research support may be used to support this increased effort.

Extramural awards include federal, state, other government or private contracts, grants, or cooperative agreements. Such awards also include special state appropriations for Breast Cancer, HIV/AIDS, or Tobacco-Related Disease research programs that have been awarded to campuses on a competitive basis by the Office of the President.

This program is in effect for the duration of the Salary Reduction/Furlough Plan, September 1, 2009 through August 31, 2010. The participant must elect to participate in this program in advance. Participation must be approved prior to the service period of the research activity. Retroactive participation is not permitted.

Faculty may not earn more than his/her normal annual pre-reduced compensation. This program may not be used to supplement administrative stipends. Faculty may not reduce their teaching and/or service commitments during participation in the program. Compensation earned under this program is considered regular pay (REG) and is subject to standard payroll deductions, benefit charges, and retirement contributions.

During the period of participation, furloughs will be forfeited and may not be used for any other purpose, including additional consulting days and campus closures. Participants are expected to be in service during campus closures, with the exception of fiscal year employees on approved vacations.

Eligibility:

This program is available to faculty who are full time (100%) and appointed to a title in a Professorial or Lecturer with Security of Employment series.

Currently this proposal does not apply to members of a Health Sciences Compensation Plan, staff employees or to members of the Senior Management program. An implementation Furlough Exchange Program is being developed for HSCP faculty.

Requires Prior Approval:

Faculty will need to work with their Sponsored Project Office (SPO) to determine whether prior sponsor approval is needed in each case. Any charges must be compliant with Office of Management and Budget (OMB) Circular A-21 requirements.
In cases where effort charged to an existing extramural award is increased, prior sponsor approval may be needed if the scope of work is adversely affected, if the cost sharing commitment is reduced, or otherwise as may be required by individual contracts and grants. Although there may be cases in which prior approval is not necessary under federal rules and under agency policy, staff and Principal Investigators will need to spend time necessary to analyze the terms of an award and to obtain approvals if necessary. This same issue is true for other instances where, under the Furlough Plan, effort to an existing federal award is to be changed.

Only those extramural fund sources that have been excluded from the Salary Reduction/Furlough Plan may be exchanged under this program.

**Implementation process:**

1. After consultation with the campus SPO, the participant submits a document to request participation in the FEP and forfeiture of furlough hours. It should identify the project in which the additional research effort will be worked, including the account and fund source to be charged.

2. Full year participation is mandatory.

   Faculty must participate in the program for the entire 2009-10 academic year. Participation for less than a twelve month period does not provide the requisite salary savings required in the Salary Reduction/Furlough Plan approved by The Regents.

   The service period for academic year faculty is mid-September through mid-June. The extramural fund source(s) will be charged for the normal academic year of July 1, 2009 through June 30, 2010 for participants on quarter campuses. Participants on semester campuses will participate from September 1, 2009 through August 31, 2010.

   Since fiscal year pay and service periods match, fiscal year employees may participate for the period of September 1, 2009 through August 31, 2010.

   An employee hired mid-year may only participate from the onset of his/her appointment through June 30, 2010 (academic year employees) or August 31, 2010 (fiscal year employees).

3. Once the participant receives approval (according to campus approval guidelines), the employee’s record must be updated in the Payroll Personnel System (PPS) as follows.

   **Note:** Do not change the FTE value associated with the 100% REG distribution

   - Delete the salary reduction distribution (SRB DOS Code).

   - Change the current 100% REG distribution to a future distribution.
     - Set the distribution begin date to the appropriate date, i.e., the day after the exchange program ends
• Create a new REG distribution.
  ◦ Distribution percent is 100% less the reduction percentage.
  ◦ Distribution begin and end dates reflect the dates applicable to the term for the furlough exchange program.

• Create a new Research distribution.
  ◦ Distribution percent equal to the reduction percentage.
  ◦ Distribution begin and end dates reflect the dates applicable to the term for the furlough exchange program.
  ◦ Extramural fund source.

4. Departments would need to process the appropriate cost transfer of funds for academic year appointees. They would need to be completed in the requisite 120 day limit.

Cost transfers or payments made in July and August for academic year effort will need to be made by October 31 (for July salary payments) and by November 30 (for August salary payments) in order to comply with the 120 day federal rule for cost transfers.
### Converts, Grants and Cooperative Agreements Table

**Accounting Codes – General Ledger**

8/4/2009 11:07:44 AM

<table>
<thead>
<tr>
<th>Fund Group Title</th>
<th>Fund Group Code Title</th>
<th>Fund Number</th>
<th>Group Code</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
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<td>General Funds Specific State Appropriations (campus awards)</td>
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<td>404110</td>
<td>AIDS Research*</td>
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<td>Special State Appropriations (campus awards)</td>
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<td>Tobacco Research*</td>
</tr>
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<td></td>
<td></td>
<td>18109-18111</td>
<td>404120</td>
<td>Tobacco Research*</td>
</tr>
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<td></td>
<td></td>
<td>18071</td>
<td>404120</td>
<td>Breast Cancer Resrch*</td>
</tr>
<tr>
<td></td>
<td></td>
<td>18072</td>
<td>404120</td>
<td>Breast Cancer Resrch*</td>
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<td>404120</td>
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<td>Breast Cancer Resrch*</td>
</tr>
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<td></td>
<td></td>
<td>18101-18103</td>
<td>404120</td>
<td>Breast Cancer Resrch*</td>
</tr>
<tr>
<td></td>
<td></td>
<td>18104-18108</td>
<td>404120</td>
<td>Breast Cancer Resrch*</td>
</tr>
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<td>State of California, State Agencies</td>
<td>State Contracts, Grants &amp; Cooperative Agreements</td>
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</tr>
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<td>Local Government Appropriations, Grants, Contracts &amp; Cooperative Agreements</td>
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<td>U.S. Government</td>
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<tr>
<td></td>
<td>Federal Grants-ARRA</td>
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<td>406230</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Federal Contracts</td>
<td>Open</td>
<td>406310</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Federal Contracts–DOE Labs</td>
<td>Open</td>
<td>406330</td>
<td></td>
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<tr>
<td></td>
<td>Federal Contracts-ARRA</td>
<td>Open</td>
<td>406340</td>
<td></td>
</tr>
<tr>
<td>Private Gifts, Grants &amp; Contracts</td>
<td>Restricted Grants</td>
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<td>408300</td>
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<tr>
<td></td>
<td>Restricted Contracts</td>
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</tr>
<tr>
<td></td>
<td>• Private Restricted Contracts</td>
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<td>408410</td>
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</tr>
<tr>
<td></td>
<td>• Clinical Drug Trials</td>
<td>Open</td>
<td>408420</td>
<td></td>
</tr>
</tbody>
</table>

*UCOP employees who are funded from these State appropriations will be subject to the furlough/salary reduction because they are acting in the capacity of a C&G Office, not performing, or directly supporting, the research itself.*
August 26, 2009

CHANCELLORS
ACADEMIC SENATE CHAIR CROUGHAN

Colleagues:

Re: Faculty use of Furlough Days for Outside Professional Activity (OPA)

Since furlough days are “non-service” days (as are holidays and unpaid summer periods), faculty may use them for compensated OPA (unless the faculty member is earning additional University compensation on the furlough days) without any change in policy. The limits of 39 days for academic year faculty and 48 days for fiscal year faculty in APM - 025 still apply as usual, but the furlough days are not counted against those totals.

To the extent that faculty are permitted to use furlough days to work on (and get paid from) federal, state, other government or private contracts, grants or cooperative agreements, as specified in the Regents Item, under the Salary Reduction/Furlough Research Exchange Program, they would not be able to use such furlough days for compensated outside professional activities. This applies to both academic year and fiscal year faculty earning furlough hours.

All other rules of APM - 025 would continue to apply, including the requirement that faculty obtain prior written approval from the Chancellor or Chancellor’s designee to engage in Category 1 activities. Campuses would need to communicate to faculty that they must report to the Chancellor or Chancellor’s designee annually all OPA, including those taken during furlough time.

For faculty who are members of the Health Sciences Compensation Plan (HSCP), the use of furlough days for OPA under this one-time limited program must also conform to local Guidelines on Occasional Outside Professional Activities as approved by the Dean and Chancellor, as stated in APM - 670, Health Sciences Compensation Plan.

For the purpose of this program, the annual HSCP threshold of 21 days specified in the “University-wide Standard Requirement” (APM - 670, Guidelines, Section II.B), may be exceeded, if approved by the Dean and the Chancellor. For the purpose of this program, if the “Alternative Option” specified in APM - 670, Guidelines, Section C, were previously approved by the Dean and Chancellor, the annual threshold of 48 days may be exceeded, if approved by the Dean and the Chancellor.

The annual earnings threshold for outside professional activities will increase, temporarily for the duration of the furlough plan, to $30,000 or 20% of the HSCP member’s rank, step, and academic
programmatic unit, whichever is greater. As specified in APM - 670, all outside clinical income must be returned to the HSCP.

Please let me know if you have any questions.

Best wishes,

Lawrence H. Pitts
Interim Provost and Executive Vice President
Academic Affairs

cc: President Yudof
Executive Vice President Lapp
Senior Vice President Dooley
Academic Senate Vice Chair Powell
Vice President Lenz
Vice Provost Greenstein
Academic Senate Executive Director Winnacker
Interim Executive Director Price
Salary Exchange Program (FEP) Addendum
Partial-Year Participation Option

September 11, 2009

Subsequent to the issuance of the Salary Exchange Program guidelines on August 26, 2009, the campuses have expressed a desire to allow faculty participation in the FEP on a partial-year basis. This is because funding from grants and contracts may not be awarded until later in the year, including ARRA funding which is being made available to the faculty throughout the year. In addition, a contract or grant may terminate prior to the end of the FEP period.

Partial-Year (Quarter/Semester) Participation

Under this Addendum, faculty may participate in the FEP on a partial-year basis during the 2009-10 fiscal year period covered by the FEP as an alternative to full-year participation. During the period of participation, furlough days will be forfeited and may not be used for any other purpose, including additional consulting days and campus closures. With the exception of the length of participation, all other criteria and instructions outlined in the FEP guidelines apply to a partial year participant.

In order to comply with campus Effort Reporting Systems, participation must be on a quarter or semester basis. Accordingly, partial-year participation in the FEP is available during fiscal year 2009-10 as follows:

- For academic-year faculty on quarter campuses, participation may begin on November 1, 2009 or March 1, 2010.
- For academic-year faculty on semester campuses, participation may begin on January 1, 2010.
- Fiscal-year faculty may elect to begin participating on October 1, 2009, January 1, 2010 or April 1, 2010.

The tables in Attachments 1 and 2 show the monthly pay periods associated with each quarter or semester for purposes of effort reporting.

Any pay periods not covered by the FEP would be subject to the Furlough/Salary Reduction Plan (the “Plan”). No retroactive payroll adjustments would be permitted to restore pay previously cut. Furlough days accrued by a faculty member would have to be used during the FEP period in accordance with the Plan and implementing FAQs.

Since the FEP period would not cover the entire fiscal year, the effort percentage charged to extramural awards (or to eligible gifts and endowment funds) for academic-year faculty must be increased proportionately to generate the savings required under the Plan. For fiscal-year faculty, the full-year percentages would be used in establishing the FEP distributions.
Participation for the entire academic term is mandatory; participation for less than a full quarter or semester is not permitted. The tables in Attachment 3 show the effort percentages required for full-year FEP participation and the additional effort that would be required for partial year participation.

The FEP distributions must be manually established in the Payroll/Personnel System using the appropriate percentage.
<table>
<thead>
<tr>
<th>FEP Participation Period</th>
<th>Pay Periods Corresponding to FEP Participation Period</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fall Quarter</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FEP participation in the fall quarter is available only to those making a full-year commitment to participate in the FEP</td>
<td>September 2009, October 2009, November 2009</td>
<td>Full-Year FEP Only: Retroactive cost transfers (or payroll adjustments) will be processed for July and August for the furlough exchange that will occur in the fall quarter.</td>
</tr>
<tr>
<td><strong>Winter Quarter</strong></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Spring Quarter</strong></td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FEP Participation Period</td>
<td>Pay Periods Corresponding to FEP Participation Period</td>
<td>Comments</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td><strong>Fall Semester</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FEP participation in the fall semester is available only to those making a full-year commitment to participate in the FEP.</td>
<td></td>
<td>Full-Year FEP Only: Retroactive cost transfers (or payroll adjustments) will be processes for July and August for the furlough exchange that will occur in the fall semester.</td>
</tr>
<tr>
<td>August 2009</td>
<td>July 2009</td>
<td></td>
</tr>
<tr>
<td>September 2009</td>
<td>August 2009</td>
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<tr>
<td>October 2009</td>
<td>September 2009</td>
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<tr>
<td>November 2009</td>
<td>October 2009</td>
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<tr>
<td>December 2009</td>
<td>November 2009</td>
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<tr>
<td></td>
<td>December 2009</td>
<td></td>
</tr>
<tr>
<td><strong>Spring Semester</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>January 2010</td>
<td>January 2010</td>
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</tr>
<tr>
<td>February 2010</td>
<td>February 2010</td>
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<tr>
<td>March 2010</td>
<td>March 2010</td>
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<tr>
<td>April 2010</td>
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</tr>
<tr>
<td>May 2010</td>
<td>May 2010</td>
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</tr>
<tr>
<td></td>
<td>June 2010</td>
<td></td>
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<tr>
<td></td>
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<td></td>
</tr>
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</table>
### Table 1: Full Academic Year Participation
*(12 Months Pay)*

<table>
<thead>
<tr>
<th>Salary Band</th>
<th>MCB¹</th>
<th>Compensation</th>
<th>Furlough – Days (Approximate)²</th>
<th>Salary Reduction (Approximate)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>&lt;=40</td>
<td>0 – 40,000</td>
<td>7</td>
<td>4.00%</td>
</tr>
<tr>
<td>2</td>
<td>41-46</td>
<td>40,001 – 46,000</td>
<td>9</td>
<td>5.00%</td>
</tr>
<tr>
<td>3</td>
<td>47-60</td>
<td>46,001 – 60,000</td>
<td>10</td>
<td>6.00%</td>
</tr>
<tr>
<td>4</td>
<td>61-90</td>
<td>60,001 – 90,000</td>
<td>12</td>
<td>7.00%</td>
</tr>
<tr>
<td>5</td>
<td>91-180</td>
<td>90,001 – 180,000</td>
<td>14</td>
<td>8.00%</td>
</tr>
<tr>
<td>6</td>
<td>181-240</td>
<td>180,001 – 240,000</td>
<td>15</td>
<td>9.00%</td>
</tr>
<tr>
<td>7</td>
<td>&gt;240</td>
<td>Over 240,000</td>
<td>17</td>
<td>10.00%</td>
</tr>
</tbody>
</table>

### Table 2: Participation - One Quarter
*(4 Months Pay)*

<table>
<thead>
<tr>
<th>Salary Band</th>
<th>MCB¹</th>
<th>Compensation</th>
<th>Furlough – Days (Approximate)²</th>
<th>Salary Reduction (Approximate)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>&lt;=40</td>
<td>0 – 40,000</td>
<td>2</td>
<td>6.00%</td>
</tr>
<tr>
<td>2</td>
<td>41-46</td>
<td>40,001 – 46,000</td>
<td>3</td>
<td>7.50%</td>
</tr>
<tr>
<td>3</td>
<td>47-60</td>
<td>46,001 – 60,000</td>
<td>3</td>
<td>9.00%</td>
</tr>
<tr>
<td>4</td>
<td>61-90</td>
<td>60,001 – 90,000</td>
<td>4</td>
<td>10.50%</td>
</tr>
<tr>
<td>5</td>
<td>91-180</td>
<td>90,001 – 180,000</td>
<td>5</td>
<td>12.00%</td>
</tr>
<tr>
<td>6</td>
<td>181-240</td>
<td>180,001 – 240,000</td>
<td>5</td>
<td>13.50%</td>
</tr>
<tr>
<td>7</td>
<td>&gt;240</td>
<td>Over 240,000</td>
<td>6</td>
<td>15.00%</td>
</tr>
</tbody>
</table>

### Table 3: Participation - Two Quarters
*(8 Months Pay)*

<table>
<thead>
<tr>
<th>Salary Band</th>
<th>MCB¹</th>
<th>Compensation</th>
<th>Furlough – Days (Approximate)²</th>
<th>Salary Reduction (Approximate)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>&lt;=40</td>
<td>0 – 40,000</td>
<td>5</td>
<td>5.00%</td>
</tr>
<tr>
<td>2</td>
<td>41-46</td>
<td>40,001 – 46,000</td>
<td>6</td>
<td>6.25%</td>
</tr>
<tr>
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<td>47-60</td>
<td>46,001 – 60,000</td>
<td>7</td>
<td>7.50%</td>
</tr>
<tr>
<td>4</td>
<td>61-90</td>
<td>60,001 – 90,000</td>
<td>8</td>
<td>8.75%</td>
</tr>
<tr>
<td>5</td>
<td>91-180</td>
<td>90,001 – 180,000</td>
<td>9</td>
<td>10.00%</td>
</tr>
<tr>
<td>6</td>
<td>181-240</td>
<td>180,001 – 240,000</td>
<td>10</td>
<td>11.25%</td>
</tr>
<tr>
<td>7</td>
<td>&gt;240</td>
<td>Over 240,000</td>
<td>11</td>
<td>12.50%</td>
</tr>
</tbody>
</table>

¹ Medical Contribution Base as of January 1, 2009.
² Furlough days remain constant in accordance with Salary Band.
### Table 4: Participation - One Semester

*(6 Months Pay)*

<table>
<thead>
<tr>
<th>Salary Band</th>
<th>MCB(^3)</th>
<th>Compensation</th>
<th>Furlough – Days (Approximate)(^4)</th>
<th>Salary Reduction (Approximate)</th>
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<tr>
<td>1</td>
<td>&lt;=40</td>
<td>0 – 40,000</td>
<td>4</td>
<td>5.33%</td>
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<td>41-46</td>
<td>40,001 – 46,000</td>
<td>5</td>
<td>6.67%</td>
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<td>47-60</td>
<td>46,001 – 60,000</td>
<td>5</td>
<td>8.00%</td>
</tr>
<tr>
<td>4</td>
<td>61-90</td>
<td>60,001 – 90,000</td>
<td>6</td>
<td>9.33%</td>
</tr>
<tr>
<td>5</td>
<td>91-180</td>
<td>90,001 – 180,000</td>
<td>7</td>
<td>10.67%</td>
</tr>
<tr>
<td>6</td>
<td>181-240</td>
<td>180,001 – 240,000</td>
<td>8</td>
<td>12.00%</td>
</tr>
<tr>
<td>7</td>
<td>&gt;240</td>
<td>Over 240,000</td>
<td>9</td>
<td>13.33%</td>
</tr>
</tbody>
</table>

\(^3\) Medical Contribution Base as of January 1, 2009.

\(^4\) Furlough days remain constant in accordance with Salary Band.
CHANCELLORS
ACADEMIC COUNCIL CHAIR POWELL

RE: Furlough Exchange Program Eligibility

Dear Colleagues:

Subsequent to the issuance of the Furlough Exchange Program (FEP) guidelines on August 26, 2009, the campuses have expressed a desire to allow participation in the FEP to the academic title series and ranks designated as "equivalent" to those of the Professor series.

This letter is to confirm that the title series and ranks identified in APM – 115, Academic Appointees “Equivalent” Titles and Ranks are eligible for participation in the Furlough Exchange Program. In addition to the title series and ranks identified in APM – 115, the Specialist in Cooperative Extension series titles, as defined in APM – 334, are eligible for FEP participation.

Please direct implementation questions or comments to Patricia Price at patricia.price@ucop.edu.

Sincerely,

Lawrence H. Pitts
Interim Provost and Executive Vice President
Academic Affairs

cc: President Yudof
Executive Vice Chancellors
Interim Executive Vice President Brostrom
Vice President Beckwith
Vice President Duckett
Vice Provost Greenstein
Assistant Vice President Plotts
Interim Executive Director Price
Manager O’Neill
Manager Ohy
Coordinator Ruiz
Proposed drafts for UCR Academic Senate Mission Statement

UCI Mission Statement:
The Systemwide Academic Senate and the Divisional Senate provide the organizational framework that enables the faculty to exercise its right to participate in University governance. The Academic Senate determines academic policy; sets conditions for admission and grading of degrees; authorizes and supervises courses and curricula; and advises administration on faculty appointments, promotions, and budgets.

UCR Draft 1:
The Systemwide Academic Senate and the Divisional Senate provide the organizational framework that enables the faculty to exercise its right to participate in University governance.

UCR Draft 2:
The Systemwide Academic Senate and the Divisional Senate provide the organizational framework that enables the faculty to exercise its right to participate in University governance, as historically acknowledged by the Board of Regents of the University of California.

UCR Draft 3:
The Academic Senate serves as the divisional body for the Riverside campus of the UC Academic Senate, providing the organizational framework that enables the faculty to exercise its right to participate in University governance, as granted by the Board of Regents.
UCR Executive Council Retreat
(Tuesday September 22, 2004)

Goals for UCR Executive Council for 2009/2010

(1) Initiate ‘return’ of Graduate Council to the Senate.
(2) Participate in the development of a strategic plan for UCR (by March).
(3) Participate in the budget cutting activities necessary for UCR for the next fiscal year (2010-20).
(4) UCR medical School; participate with the administration on generating a new business plan.
(5) Consideration of the Vice Chair succeeding to become the Divisional Chair process after one year.
(6) Professor of the Graduate Division (for Emeriti)
(7) Other