

A stone wall sign for the University of California, Irvine. The sign is made of light-colored stone blocks and features the university's name in large, dark, serif letters. To the left of the main text is a circular seal of the University of California. The sign is set against a background of green trees and a clear blue sky. In the foreground, there is a field of tall, green grasses.

University of California, Irvine

FY25 Budget Office Open Forum 8/27/2024

**UCI** Division of Finance and Administration | With U • For U

# Table 4 Submission Key Dates

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- Table 4 Call out this week: **Tuesday, August 27<sup>th</sup>**.
- Unit submissions are due to the Budget Office: **Monday, September 9<sup>th</sup> (earlier would be appreciated)**.
- Regents Table 4 pertains to Self-Supporting Faculty FTE and Salaries.
- It is important for ensuring accurate reporting to UCOP regarding self supporting programs here on campus and alignment with financial resources.

# Table 4 Submission - Recent Updates

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- **FTE Shift:** Starting in FY2024-25, schools with self-supporting programs, where faculty teach onload, will shift faculty FTE and permanent funding from core funds to self-supporting funds consistent with Table 4 reporting.
- **Financial Transparency:** The funding transition aims to improve financial transparency and align recurring resources with permanent obligations they are supporting.
- **Workload Policy:** Each unit should provide its workload policy. If standardized by the school, include this information when submitting the template, listing all programs if they differ.
- **Guidelines Doc Updated:** we are expecting onload course valuation relative to workload to be consistent across all programs (1 course of 4 course load = .25). Alternative methodologies are no longer used for this report.
- **Calculation:** Calculate using the annual rate multiplied by the percentage of teaching load for each class, in line with the department's workload policy (i.e. please calculate as the annual rate \* % of teaching load for each class).

# Calculation Method: Transition from State to Self-Supporting Funds

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- **Calculation Ratio (based on 4 course load):**
  - Share of Teaching Load (FTE) = 0.125;
  - The Budget Office Calculated Share of Teaching = 0.250;
  - Total Regular Pay (State Funds) = 0.125;
  - Regular Pay Covered by Program (Non-state/allowable funds) = 0.250
- **Calculation Method:** 1 course load=.125; 4 course load 1=.25 or = Share of Teaching Load (FTE)/0.125\*0.25.
- **Applicable CTOs (excluding state fund "19900"):** **010** (Professorial-Tenure), **011** (Professorial-Non Tenure), **114** (Acting Professor-Senate), **124** (Acting Professor-Non Senate), **210** (Lecturer-Security of Employment), **211** (Lecturer-Potential Security of Employment - 100% - Senate).
- Each unit must update their Table 4 and submit it to the Budget Office. The Budget Office will recalculate the teaching load based on the faculty's on-load courses for these programs. An equivalent amount of FTE and permanent funding will be shifted from core funds to self-supporting funds, in accordance with this calculation method.

# Table 4 – Template

Self-Supporting Program Faculty FTE and Salary

1=.125 4 crs load 1=.25..."=G2/0.125\*0.25"

0.125 0.250

Campus	Fund #	Program	Faculty Member	CTO	Share of Teaching		Annual Salary	Total Regular Pay (State Funds)	Regular Pay		Notes/Comments	Quarter	Course Type	Course Code	Course Number	Course Title	Units	Area or Dept
					Load (FTE)	Share of Teaching			Covered by Program (Non-state/allowable funds)*	Overload Salary								
Oakland	19900	EMBA	Jones, Howard	010	0.250	-	\$165,000	\$41,250		\$10,313	overload paid as compensation (vs academic enrichment fund)	F	Core	12345	219A	Microecc	4	ECON
Oakland	20229	IDP	Shackleford, Rusty	220	0.330	0.660	\$78,000		\$25,740		lecturer charged directly to program	W	Core	23456	205	Accounti	4	ACC
Oakland	19900	IDP	Shackleford, Rusty	220	0.250	0.000	\$150,000	\$37,500			onload; expensed to program based on buyout policy, course % * salary	F	Core	34567	220B	Marketing		MKT
								\$0		\$0								
								\$0		\$0								
								\$0		\$0								
								\$0		\$0								
Total, Allowable Funds supporting						\$0		\$0		\$0								

(Please use this section to define how the course values listed relate to your workload policy)

- (1) Please include all courses, instructors, and funds involved in self-supporting program instruction.
  - (2) Transition from State to Self-Supporting Funds: 1 course load=.125; 4 course load 1=.25 or = Share of Teaching Load (FTE)/0.125\*0.25. Applicable CTOs (excluding state fund "19900"): 010, 011, 114, 124, 210, 211. **Course Load may vary by unit.**
  - (3) Calculate the share of teaching load based on departmental workload policies for the faculty title which is being paid with allowable funds. For example, if the normal workload for a Professor is four courses per year, then one course in the self-supporting program counts as 0.25 FTE.
  - (4) Calculate regular pay covered by the self-supporting program by multiplying Total Regular Pay by the FTE estimate.
  - (5) If the courses are taught on an overload basis, enter the amount of overload salary in the final column.
  - (6) Campuses may submit a single table for all self-supporting programs.
- \*Consistent with the requirement that the SSGPDPs must cover all program costs, for a "buy-out" the total cost of faculty salary, benefits, and retirement must be funded by the SSGPDP-generated or other allowable funds

**Explanation:** This information is used to deduct self-supporting program faculty from faculty counts, estimation of State-supported FTE faculty FTE, and state-supported faculty workload. This detailed sheet can be used for faculty salary estimates in

**Detail:** Include reporting from all fund sources (State and non-state/allowable funds) supporting SSGPDPs. SSGPDPs may not rely on disallowable funds (i.e., State General Funds and tuition and fees for program costs.). Consistent with the

# FY25 Budget Planning Reminders

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- Merits and Promotions – Using Academic Personnel Schedules

Estimated Faculty Merits, Promotions, Dean Merit/Promotion/Range, and assoc benefits (BASE)

- BDP
- Range (OCT) – Send us the school’s account to draw from to support the global BATs by mid to late September.
- Next Forum will be on the Staffing update.

Questions?