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Chair of the Assembly and the Academic Council
Faculty Representative to the Board of Regents
University of California
1111 Franklin Street, 12th Floor
Oakland, California 94607-5200

August 10, 2007

ROBERT C. DYNES
PRESIDENT

Re: Academic Council Policy on Receiving Estimates of Fiscal Impact

Dear Bob,

At its July 25, 2007 meeting, the Academic Council unanimously adopted, as an internal regulation of practice, the following statement:

Whenever practicable, all policies or proposals submitted to the Academic Council should be accompanied by an estimation of fiscal impact.

The Council is initiating this as a one-year pilot program, hoping it to be a cooperative effort with the Office of the President as the source or channel of most of the proposals we review. As you may know, the Academic Council recently sent out for informal review a more comprehensive fiscal-impact-statement proposal intended to assure both the availability and the consideration of information on the fiscal impact of proposed policies and programs that come before the Council. After this review, the Council decided that the above simple statement of practice would be adequate as a first step and appropriately flexible for a pilot venture. The statement will be included in the Academic Senate's procedural guidelines.

To provide you with an example of the type of information that we wish to receive, I have enclosed a working draft of a fiscal-impact template. This draft template has not been endorsed and is meant only as an exemplar. The Council would, however, be happy to consult with your office on alternate versions of the template or other formats for gathering and transmitting this information.

I want to emphasize that the Academic Council intends this new attention to fiscal impacts to be a benefit rather than a burden, one that will create a more informed review process at all levels. We plan to evaluate this pilot practice near the end of the 2007-08 year, with input from the administrative side.

Please do not hesitate to contact me with any questions.

Sincerely,

A handwritten signature in blue ink, appearing to read 'JO', is centered below the word 'Sincerely,'.

John B. Oakley, Chair
Academic Council

Copy: Academic Council
María Bertero-Barceló, Executive Director

Encl.: 1

JO/BGF

Draft Template for a Fiscal Impact Statement:

Fiscal Impact Statement

Date:

Proposer:

Tracking number:

Contact person:

Summary of the Proposal:

Check appropriate box if the impact meets these criteria:

No Fiscal Impact.

Fiscal Impact less than \$100,000 annually or \$500,000 over 5 years.

Fiscal Impact cannot be determined.

Brief Explanation:

Fill in the form below if the proposal does not fit the criteria above:

Fiscal Impact of \$100,000 annually or \$500,000 over 5 years.

(if checked, fill in the rest of the Fiscal Impact Statement)

Assumptions:

Describe how estimates were derived:

Estimated Impact to the UC by Fiscal Year

Year 1

Year 2

Year 3

Year 4

NET IMPACT (duration and total sum)

____ This rule is required by state law or federal mandate.

Please identify the state or federal law:

____ Funding has been provided for the impact of proposal.

Please identify the amount provided and the funding source:

____ Funding has not been provided for the impact of proposal.

Please explain how the affected entities will pay for the impact:

Impact on individual divisions:

Impact on individual faculty or academic units:

Consultations with:

Supporting documents:

Analyst preparing estimate:

Date:

Telephone Number: XXX-XXX