

Directions for Document I – Rate Proposal

The UCD Rate Policy is P&P 340-25, Recharge Activities.

Overall Directions:

- Complete Document I – Rate Proposal on the computer and email it with Documents II and III to your approving office.
- The field lengths are limited. In the rare instances, where the information will not fit in the limited field, include the information in Document II–Text or Document III--Spreadsheets.

Section and/or Line Item Directions:

Introduction

1 through 3. Self-explanatory.

4. This field is required. It is limited to 500 characters. The purpose of this field is to give the reviewer a brief introduction to the rate package. State whether it is a new rate or a change to existing rates. If the rate is existing and increases are proposed, state succinctly why increases are necessary. If the rate is new but the service has been provided, state how the service was provided in prior years.

5. These totals should match the data in the Total Budget projection on the Revenue-Expense Summary sheet in Document III—Spreadsheets.

6. This is the effective date you propose. Per P&P 340-25, IV.A.3: “The review and approval by the Office of Resource Management and Planning and the Campus Rate Group requires a minimum of 60 days from the submission of the rate proposal by the dean, vice chancellor or vice provosts. Retroactive rate approvals are rarely allowed.

7. Per P&P 340-25, IV.A, some rates can be approved by the dean, vice chancellor or vice provost. Check the appropriate box for the final approval.

Contacts and Approvals

Note: No signatures!

1 through 5. Self-explanatory.

Rate Details

1 through 3. Mostly self-explanatory. If you don't have a copy of the most recent rate group approval letter, contact your Dean's office.

4. The purpose of this item is so the Rate Group understands who will be impacted by the rate change.

Example 1: College of X, Unit Y is billed for about 50% of the hours for these labor services and College T Unit V is billed for about 40%.

Example 2: 100% of the billing is to UCD students.

Example 3: About 80% of the billing is to grants and contracts at UCD.

Example 4: About 50% of the billing is to a broad mix of UCD departments and about 50% is to non-university clients.

5. through 9. Self-explanatory.

10. If the rate proposal has more subsidy accounts than fit in this space, complete the Subsidy Account sheet in Document III—Spreadsheets.

11. through 13. Self-explanatory.