New Program Proposal Template Frequently Asked Questions:

How do I start the process?
The Academic Program Implementation Team recommends beginning the process by meeting with associate vice president of finance and administration, Bill Ray.

How will completing this template support my proposal?
The new Academic Program Proposal Template facilitates the creation, review, evaluation, approval, and implementation of new programs at Pacific University. These guidelines are meant to support the policies and procedures as outlined in the University Faculty and Governance Handbook, chapter 6, and provide the tools necessary for successful approval and implementation of new programs.

Having a consistent format for the proposal of new programs ensures all information needed for a thorough review of a proposed program is provided.

Tips for completing the template:

1. Please review chapter 6 of the University Faculty and Governance Handbook to familiarize yourself with the approval process.
2. All text in red in the template is explanatory – please delete after filling out the form.
3. **Table of Contents-** sections #1 – #3 are referred to collectively as the "Synopsis" of this document. The Synopsis must be completed and submitted to the President's Cabinet for preliminary go-ahead. The Academic and Supporting Information and Appendix A must be completed prior to submission of this proposal for university-level review. Appendix B must be completed during the review and approval process.
4. **Approval Proccess Timeline** – Contact the administrative aide to university governance kimg@pacificu.edu for assistance completing this section.
    a. Under "Date Received," "Reviewed," "Endorsed," or "Approved" list the date or anticipated date and action taken or anticipated.
5. **Summary of Feedback** – For each group that reviews this document, a summary of feedback must be included. Inserting relevant sections of minutes is recommended. Contact the administrative aide to university governance kimg@pacificu.edu with questions about completing this section.
6. Throughout the template there are hyperlinks to provide you with access to additional information. Some are links to the email of the individual best able to assist you in answering the questions in a particular section. Some are links to this FAQ document. Some are notes that provide additional definitions or information. Please click on the hyperlinks for additional information.
7. **Mac Users -** This template was created using macros that appear on a PC as fillable fields. The macros will appear as images when using a mac. Mac users will be able to enter information into the tables and excel spreadsheets within the document. Hyperlinks will work as well. Information for using fillable fields and option buttons:
    a. When you click on a fillable field, you will be able to enter text, but the box will disappear. This is fine.
    b. Because they appear as images, mac users will not be able to select option buttons. Please click on and delete the options you are not selecting. For

example, if it is a yes or no option and you wish to select yes, delete the no option.

What is the process for approving new programs and how long will it take?
The approval process is detailed in chapter 6 of the University Faculty and Governance Handbook.

The ideal time to submit a proposal for **university-level** review is in September thru mid-October to make it through the review and approval process during an academic year. A new program proposal may be started and developed at any time. However, certain groups or bodies who must give approval including the Board of Trustees, only meet at certain times during the year. The proposal must be ready for presentation prior to the meeting date and in time to be added to their agenda. Use the contact information in the table below to obtain additional information and to request your proposal be added to relevant agendas.

"It is the responsibility of the units proposing a new program to identify accreditation, recruitment, and facility issues that affect the timeline for starting up new programs and include this information in their proposal. Requested revisions to the proposal during the approval process can alter the timeline. Adequate time between estimated approval of the program and its start date must be accounted for to ensure support services are available for the program. It is important to note that this sequence does not include time required to receive accreditation from external bodies, recruit new faculty and staff, acquire appropriate facilities and equipment, or recruit students. Nor does final approval by the Board of Trustees automatically entail immediate funding of a new program." (Excerpted from chapter 6 of the University Faculty and Governance Handbook)

CONTACT INFORMATION

GOVERNANCE UNIT	CONTACT	EMAIL	PHONE
Implementation Review Committee	Bill Ray, Associate VP for Finance and Administration	raywb@pacificu.edu	503-352-2786
President's Cabinet	Mic Howe, President's Chief of Staff	mic.howe@pacificu.edu	503-352-2214
Board of Trustees	Mic Howe, President's Chief of Staff	mic.howe@pacificu.edu	503-352-2214
University Curriculum and Standards Committee	Kim Greenwood, Administrative Aide to Governance	kimg@pacificu.edu	503-352-2114
University Council	Kim Greenwood, Administrative Aide to Governance	kimg@pacificu.edu	503-352-2114
Staff Senate	Kim Greenwood, Administrative Aide to Governance	kimg@pacificu.edu	503-352-2114
Faculty Senate	Kim Greenwood, Administrative Aide to Governance	kimg@pacificu.edu	503-352-2114

What is the process for implementing new programs and how long does it take?
The recruitment process ideally begins 24 months **prior** to enrollment of the first student. For example, early notification to the Admissions Office is essential for inclusion of new programs on printed materials (brochures, informational cards, etc.), representation at fall travel events, application development, and other Admissions Office support. Additionally, the development of a marketing and advertising plan begins well before the program has been approved and discussions should begin early in the proposal process. Several months prior to expected approval, deliverables should be defined and work should be underway.
It is recommended that final approval is completed and program details are provided to the Admissions Office prior to July 1 of the academic year **before** students are expected to enroll so that students can be recruited to the new program.

As it states in chapter 6 of the University Faculty and Governance Handbook, "Representative(s) of the college which will house the new program will work with the members of the Academic Program Implementation Team to implement the new program. The college representative(s) will immediately inform the team of any changes made to the program after it is formally approved."

The following timeline summarizes the time required for specific support service areas to implement the new program. Please use this as a guide when scheduling meetings with support services.

Support Area	24 Months Prior to First Enrollment	15 Months Prior to First Enrollment	6 Months Prior to First Enrollment	3-4 Months Prior to First Enrollment	1-2 Months Prior to First Enrollment	Mandatory Date Prior to First Enrollment
RECRUITING SERVICES- Admissions (undergrad, professional, international) and Marketing & Communications	For a program that will target a cohort Pacific currently does not recruit	For a program similar to an existing program that targets a cohort Pacific currently recruits	MarCom deliverables including web content, marketing materials, advertising campaign, and earned media - Total: 2-3 1/2 months *Begins 4-6 weeks after deliverables are determined.*	MarCom deliverables including web content, marketing materials, advertising campaign, earned media -*Completed within 4-8 weeks once work has begun*		
ENROLLMENT SERVICES- Undergraduate Advising, Institutional Research, Financial Aid, & Registrar	Degree requirements, course prefixes(es), CIP code, SIS information	Registrar needs specific course descriptions, and first term's course offerings	Financial Aid report of new academic program to USED 3 months following			Catalog text submitted to the Registrar by March prior to the academic year in which the program

			NWCCU accreditation			will be offered
STUDENT SERVICES- Student Life						
EDUCATIONAL FACILITIES & SERVICES– Facilities, Library, and University Information Services	Construction plans, plans for new software implementation, plans for computer and AV needs	Orders for admin staff computers, phones, and software for those starting prior to first enrollment	Orders for all new computers, phones, and software for faculty starting at first enrollment			
FINANCIAL SERVICES- Budget Office and Business Office	**Budget Office-** Financial Budget Plan & Narrative completed and approved by Bill Ray & Cabinet prior to distribution to governance units	**Budget Office-** Finalize budget plan, including confirmation of salary levels, tuition & fee rates, enrollment, expense assumptions. Document any changes from original plan, receive approval from Bill Ray. Ensure BOT approval of I/O. Budget account #'s assigned, including revenue accounts. **Business Office-** Provide student billing cycle information and rates for full time, part time, overload, and audit. Assist as needed with BO set up of billing tables. For clinics, assist with	**Budget Office-** Ensure budget lines are assigned proper account #'s for posting.			

		implementation of billing system				
PERSONNEL SERVICES- Human Resources		6-15 months				
INTERNATIONAL SERVICES- International Programs	Authorization for F-1/J-1 student attendance		Dates for new student orientation due			

How do I complete the budget templates?

The budget plan consists of a series of budget templates made up of four Excel spreadsheets in one Excel file and one narrative template in a Word file. Complete the detailed budget plan template first (second tab in the Excel template file) followed by the Budget Plan Narrative template. The first year of the Budget Plan should be the next fiscal year regardless as to whether your plan includes revenues or expenses in that year. For example, if you are submitting a plan in Fiscal Year 2014/15, the first year in the Budget Plan would be Fiscal Year 2015/16. The standardized templates are:

1. **Excel File**
   a. **Summary report template (Excel)** – **Don't enter any information into this summary spreadsheet.** This report is the first spreadsheet tab and provides a high-level, one-page financial summary report of the new program. This spreadsheet is protected to prevent any input and will automatically be updated as information is entered into the budget plan template spreadsheet.
   b. **Budget Plan template (Excel)** – This template is the second spreadsheet tab and includes the Revenues and Expenditures (Expenses & Capital Assets).
      i. **CPI –** Include a CPI inflation factor of up to **3%** increase per year for payroll salaries and other applicable expenses (i.e. such as leases and contracts, advertising, etc.) that are affected by inflation.
      ii. **Hire Dates –** Consider the hire date of employees that may not be the first of the fiscal year. Mid-year hires may be possible to save costs in the initial year.
      iii. **Computer Equipment –** Computer equipment for a new employee should be included in the budget plan. UIS will only supply replacement computers which should not be included in the budget plan.
      iv. **Capital Outlay** – In the Capital Outlay section of the budget template, include items that individually or a combined set cost more than $5,000 each. Generally these types of costs are one-time and are only included in the fiscal year of the purchase. Also, consider any

Reserve needs to replace or repair major Capital items and include the appropriate amount in the Capital section.

   v. **Indirect Cost Rate -** There are support areas within Academic Affairs, Finance & Admin, Student Life, and University Advancement (i.e. Advising Center, Business Office, Financial Aid Office, Institutional Research, Registrar, etc.) that may be impacted and incur costs due to the new program. To facilitate estimating these types of “indirect” costs, an “Indirect Cost Rate” (ICR) equivalent to 20% of the non-capital expenses of the budget plan will automatically be charged and included in the budget plan template. The ICR will be used as a benchmark by Cabinet to help determine financial sustainability.

  c. **Payroll Positions template (Excel)** – This template is the third spreadsheet tab and shows the payroll positions detail. Complete the Payroll Positions support schedule spreadsheet **before** entering information into the Payroll section of the Budget Plan. The payroll support schedule provides detail hiring information that is summarized and included in the budget plan template spreadsheet.

2. **Budget Plan Narrative template** **(Word)** – This template is a Word document file and includes any specific assumptions and explanations that would be helpful in reviewing and understanding the Budget Plan. If there is an amount in the budget plan template, then there should be an explanation in the narrative to explain the amount and any related assumptions about it.