


## POLICY CONCEPT FORM

Name and UO Title/Affiliation:	Kassy Fisher, Assistant Vice President for Admin and COS, Finance & Administration
Policy Title & Policy :	Return of Overhead Charges on Continuing Education and Designated Operations Activities 06.00-07
Submitted on Behalf Of:	Jamie Moffitt, VPFA & CFO
Responsible Executive Officer:	Vice President for Finance and Administration 

**SELECT ONE:**  New Policy  Revision  Repeal  
*Click the box to select*

**HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT:**  Yes  No  
**If yes, which attorney(s):** Missy Matella; Bryan Dearing

### GENERAL SUBJECT MATTER

*Include the policy name and number of any existing policies associated with this concept.*

Return of Overhead Charges on Continuing Education and Designated Operations Activities,  
<http://policies.uoregon.edu/policy/by/1/06-finance-and-business-affairs/return-overhead-charges-continuing-education-and-designa>

### RELATED STATUTES, REGULATIONS, POLICIES, ETC.

*List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary. Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.*

Also proposed for repeal: Charging Administrative Costs to Auxiliary Enterprises,  
<http://policies.uoregon.edu/charging-administrative-costs-auxiliary-enterprises>

### STATEMENT OF NEED

*What does this concept accomplish and why is it necessary?*

We recommend repealing this policy which outlines a procedure that no longer is applicable given that the university, in support of its operations, has a long-standing and transparent practice and process for determining, periodically evaluating and assessing fees for overhead costs (such as administrative costs, utilities, etc.) to auxiliaries, continuing education and designated operations funds.

### AFFECTED PARTIES

*Who is impacted by this change, and how?*

Units with auxiliary funds and other non-General and education funds that are charged administrative overhead.

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**CONSULTED STAKEHOLDERS**

*Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc..))*

<b>Name</b>	<b>Office</b>	<b>Date</b>
Stuart Laing	Budget and Resource Planning	Jan 2017
Brad Shelton	Office of the Provost and Academic Affairs	Jan 2017
Missy Matella, Bryan Dearing	Office of the General Counsel	Jan 2017
Jamie Moffitt	Office of the VPFA/CFO	Jan 2017

**Text of Current Policy: Recommended for repeal**

**Return of Overhead Charges on Continuing Education and Designated Operations Activities**

Last Updated:

07/01/2002

Effective Date:

07/01/2002

Reason for Policy:

To inform deans/directors/budget managers concerning overhead charges

Policy Statement:

All Continuing Education funds (both for-credit and not-for-credit in any fund group), and all Designated Operations funds will be assessed an 8 percent overhead charge. In special circumstances and upon the written request of the fund manager, the provost or appropriate vice president may reimburse or waive some or all of the overhead charge. The following criteria may be used in deciding whether or not to reimburse an activity.

If the activity primarily involves secondary students and has potential positive recruiting consequences for the University;

If the activity is planned to continue over some time, entails some risk in the undertaking, and will require expending funds for setup costs before significant income can be earned.

If the University is selected as the site of the annual meeting of a prestigious national professional association or otherwise hosts an event that brings additional distinction to the University.

The provost or other vice president will consult from time to time with the Associate Vice President for Budget and Finance concerning the effect of overhead collections decisions upon the university's income budgets.