



**Administrative Policy Coordination  
Policy & Accountability**  
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# ADMINISTRATIVE POLICY & PROCEDURE DEVELOPMENT WORKSHEET

## INSTRUCTIONS

For details on approval and publication process, please review the Procedure Approval and Publication Process document. Before a policy/procedure is drafted, the Policy Contact completes this Worksheet and obtains signature from the appropriate Responsible Official(s) sponsoring the policy/procedure. If you are revising an existing policy/procedure, please attach a copy of the current policy/procedure. Submit this Worksheet electronically to Administrative Policy Coordination at [sireland@ucmerced.edu](mailto:sireland@ucmerced.edu).

## SECTION 1: POLICY/PROCEDURE CONTACT INFORMATION

Date of Request: \_\_\_\_\_

Name of Policy Contact: \_\_\_\_\_ Campus Unit: \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

## SECTION 2: POLICY/PROCEDURE INFORMATION

Title of Policy/Procedure: \_\_\_\_\_

Classification:       New Policy                       Change to Existing Policy; List Policy Number: \_\_\_\_\_

New Procedure                       Change to Existing Procedure; List Procedure Number: \_\_\_\_\_

Select reason for the new policy/procedure or change to existing policy/procedure:

- State Law/Regulation               Federal Law/Regulation
- Regents Policy                       Best Practice
- Risk Avoidance                       Other: \_\_\_\_\_

Describe in detail the reasons why the new policy/procedure or change to existing policy/procedure is needed:

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\_\_\_\_\_

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Summarize the new policy/procedure or changes to the existing policy/procedure:

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\_\_\_\_\_

List any policies or procedures that should be referenced by the new policy/procedure:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

List any policies or procedures that may be impacted by the new policy/procedure:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please select campus units and constituencies impacted by this policy/procedure (select all that apply):

Reviewing Offices:

- Budget and Planning
- Business and Administrative Services
- Campus Counsel
- Development and Alumni Relations
- Office of the Chancellor
- Provost and Executive Vice Chancellor
- Research
- Student Affairs

Constituencies:

- Staff
- Faculty
- Students
- Alumni
- Donors
- Visitors
- Affiliates
- Others (specify): \_\_\_\_\_

Select the offices, departments, and individuals you have already consulted about this policy/procedure (select all that apply):

Reviewing Offices:

- Budget and Planning
- Business and Administrative Services
- Campus Counsel
- Development and Alumni Relations
- Office of the Chancellor
- Provost and Executive Vice Chancellor
- Research
- Student Affairs

Specific Departments:

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Individuals:

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### SECTION 3: ENDORSEMENT OF RESPONSIBLE OFFICIAL(S) AND POLICY CONTACT

Campus policies and procedures must be sponsored and endorsed by at least one Responsible Official at the Vice Chancellor level or above. Please select the Responsible Official(s) sponsoring this policy/procedure and obtain signature(s) below:

- Dorothy Leland, Chancellor or Luanna Putney, Associate Chancellor      Signature: \_\_\_\_\_ Date: \_\_\_\_\_
- Tom Peterson, Provost and Executive Vice Chancellor      Signature: \_\_\_\_\_ Date: \_\_\_\_\_
- Sam Traina, Vice Chancellor for Research      Signature: \_\_\_\_\_ Date: \_\_\_\_\_
- Michael Reese, Vice Chancellor for Business & Administrative Services      Signature: \_\_\_\_\_ Date: \_\_\_\_\_
- Charles Nies, Interim Vice Chancellor for Student Affairs      Signature: \_\_\_\_\_ Date: \_\_\_\_\_
- Kyle D. Hoffman, Vice Chancellor for Development & Alumni Relations      Signature: \_\_\_\_\_ Date: \_\_\_\_\_
- Dan Feitelberg, Vice Chancellor for Budget & Planning      Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Responsible Official(s): Please check the following as appropriate:

- Check here if the policy/procedure requires the approval of all Vice Chancellors
- Check here if you would like to review the policy/procedure again before it is implemented and published

Signature of Policy Contact: \_\_\_\_\_ Date: \_\_\_\_\_

**FOR ADMINISTRATIVE POLICY COORDINATION USE ONLY**

Policy/Procedure:  Policy  Procedure      Subject Area: \_\_\_\_\_      Number Assigned: \_\_\_\_\_

Action Taken:

- Referred to General Counsel for Review, Date: \_\_\_\_\_; General Counsel Approval Received, Date: \_\_\_\_\_
- Routed to Responsible Official(s) for VC Approval, Date: \_\_\_\_\_
- Posted for Comment, Date: \_\_\_\_\_; Comments to Policy Contact, Date: \_\_\_\_\_
- Routed for Publication, Date: \_\_\_\_\_
- Other: \_\_\_\_\_