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.

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:

________________________________________________________

________________________________________________________

________________________________________________________

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

________________________________________________________

________________________________________________________

________________________________________________________

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):

- 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

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

<table>
<thead>
<tr>
<th>Reviewing Offices</th>
<th>Specific Departments</th>
<th>Individuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget and Planning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business and Administrative Services</td>
<td></td>
<td></td>
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<td>Campus Counsel</td>
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<tr>
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<tr>
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<td></td>
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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
- Tom Peterson, Provost and Executive Vice Chancellor
- Sam Traina, Vice Chancellor for Research
- Michael Reese, Vice Chancellor for Business & Administrative Services
- Charles Nies, Interim Vice Chancellor for Student Affairs
- Kyle D. Hoffman, Vice Chancellor for Development & Alumni Relations
- Dan Feitelberg, Vice Chancellor for Budget & Planning

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: ____________________________

Revised 4/9/2015