

**Provost's Office Protocols for
Requests for President's Attendance/Participation in an
Event/Meeting Sponsored by an Academic Affairs' Unit**

The President's Office has established new protocols for requests for the President to attend or participate in a campus-sponsored event or a meeting with off-campus guests. As of September 19, 2008, all requests must be routed through the respective Provost's/Vice President's office. The following protocols will be followed for requests generating from units within the Division of Academic Affairs.

1. Event Coordinators are advised to *plan ahead* – the review and confirmation process involves several steps, and the President's calendar often fills months in advance.
2. Reporting lines are to be followed when submitting requests for the President's attendance or participation in an event or meeting (e.g., Department Chair submits to Dean, Dean submits to Provost, Provost submits to President).
3. Final confirmation of the President's attendance/participation in an event or meeting will be made following submission of the "Required Information Checklist" and any supporting documents mentioned in Items 5.b., 5.c. and 6 below.
4. **Step One ~ Preparation and Submission of Requests**
 - a. Requests submitted to the Provost's Office first must be reviewed and endorsed by a member of the Academic Affairs Leadership Council (AALC – Academic Affairs Dean, Associate Vice President, Director of School of Nursing, Director of Global Education, Academic Affairs Resource/Operations Manager, or Chair of the Academic Senate). If an AALC member delegates this responsibility, please notify Marcy Boyle in the Provost's Office. *Please note:* requests received directly from a subunit within a college or unit will be returned for proper routing.
 - b. Requests must be submitted on the Division of Academic Affairs' "Request for President's Attendance/Participation in an Event/Meeting" form, available online at <http://www.csusm.edu/aa/forms.htm>
 - c. Abbreviated guidelines for completing the form are provided on page 2 of the form.
 - d. Typically, requests must be received by the **AALC member** *no less than 25 working days in advance of an event or a meeting, and earlier if at all possible*. If endorsed by the AALC member, the request must be received by the **Provost's Office** *no less than 20 working days in advance of an event or a meeting, and earlier if at all possible*. The AALC member should forward endorsed requests via email attachment concurrently to both Marcy Boyle and Carol Givens (mboyle@csusm.edu and cgivens@csusm.edu) to ensure timely handling of the request. It would be very helpful if the subject line of the email message was worded: "Request for President's participation ~ XYZ (name of) Event or Meeting".
 - e. The individual listed on the request as the "Event Coordinator/Contact" will be responsible for answering any questions about the event/meeting and for coordinating all arrangements for the event.

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- f. As necessary, mentoring for the individual(s) planning an event or meeting to which the President is invited as a guest or participant will be provided by staff in the respective AALC members' office (if event is being planned by a subunit reporting to an AALC member) or by staff in the Provost's Office (if event is being planned by an AALC member).
- g. The yellow "Provost's Transmittal Form" is not required when submitting a request.
- h. Staff in the Provost's Office will serve as the liaison between the President's Office and the AALC member's office and the Event Coordinator/Contact.
- i. Marcy Boyle, Assistant to the Provost, has primary responsibility for reviewing request forms and forwarding to the Provost, who will, in turn, forward to the President's Office.

5. Step Two ~ Following Notification of "Tentative Hold" on President's Calendar

- a. When notification is received from the President's Office that a request has been entered as "tentative" on the President's calendar, Carol Givens, Administrative Coordinator in the Provost's Office, will forward the response via email to the Event Coordinator/Contact, copying the respective AALC member's assistant and Marcy Boyle.
- b. If notice is received that the President is not available to attend an event or meeting, Carol Givens will notify the Event Coordinator/Contact via email, copying the AALC member's assistant and Marcy Boyle.
- c. A checklist of "required information" provided by the President's Office will be forwarded with the email mentioned in 5.a. above. A return due date will be provided – typically, ten (10) working days prior to the event/meeting, or earlier, depending upon the scope of the event. See Item 6 below for samples of information that may be required on the checklist.
- d. In order for the event/meeting to be confirmed on the President's calendar, the "Required Information Checklist", and any necessary supporting documents, must be completed and returned to the Provost's Office by the specified return due date. The document(s) should be submitted via email attachment to both cgivens@csusm.edu and mboyle@csusm.edu, copying the respective AALC member's assistant.
- e. Carol Givens has primary responsibility for reviewing and forwarding properly completed "Required Information Checklists" and any supporting documents to the President's Office.
- f. An incomplete "Required Information Checklist" will not be forwarded to the President's Office. Carol Givens will return it to the Event Coordinator/Contact, copying the respective AALC member's assistant and Marcy Boyle. Resubmission of the completed checklist and supporting documents may be made as long as it is received by the submission due date (typically, ten (10) working days prior to the event/meeting).
- g. Timely submission of the "Required Information Checklist" and any supporting documents is the sole responsibility of the Event Coordinator/Contact. Neither staff in the Provost's Office nor in the respective AALC member's office will be tracking to ensure timely submission.
- h. Upon receipt of the properly completed "Required Information Checklist", the President's Office will confirm the President's attendance. When she receives this final confirmation,

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Carol Givens will relay the information via email message to the Event Coordinator/Contact, copying the respective AALC member's assistant and Marcy Boyle.

6. The following items, among others, may be requested in the "Required Information Checklist" mentioned in Step Two
 - a. Background information for the event, including purpose of event/meeting
 - b. Location
 - c. Time formal program will begin
 - d. Requested time of President's arrival
 - e. *Final* program/schedule, including names and titles of other speakers, and program timeline, including the time the President is scheduled to speak
 - f. Guest/RSVP list (invitees names, titles, and affiliations), indicating "accepts", "regrets", "no response"
 - g. Room set-up (lecture, banquet, theater, u-shape, round tables, etc.)
 - h. Speaker logistics (e.g., podium, mics, technology, etc.)
 - i. If tables, reserve a table for the President and provide names, titles, and affiliations, if appropriate, of the individuals who will be sitting at the table with her
 - j. Menu, if event/meeting involves catering
 - k. Biographical information of off-campus guest(s)
 - l. If a meeting with off-campus guest(s)
 - i. whether a Welcome Packet will be required
 - ii. whether visit includes a campus tour, and if yes, conducted by whom
 - iii. funding source for expenses related to visit
 - iv. if an international visitor, provide information about the appropriate protocol for the guest's culture
7. Proposal for a special event to be held at the President's home
 - a. In extraordinary situations, an AALC member may propose that a special event be held at the President's home.
 - b. Prior to preparing a "Request" form, the AALC member should discuss the proposal with the Provost during one of their regular standing 1:1 meetings (or request a special ad hoc meeting to discuss with the Provost).
 - c. If the proposal is endorsed by the Provost, she will present the proposal to the President.
 - d. If the event concept is accepted by the President, the AALC member will follow the above protocols to formally submit the request.