

E2.205 Action Request Format

 I. INTRODUCTION

The President's Office receives numerous requests for action from the campuses. These requests span the full range of University activities and come in a variety of formats. Some requests come in the action request format outlined below. Others come as memos or very lengthy documents. Occasionally the salient issues and specific action desired are unclear. This can result in delays due to the need to seek additional information and/or clarification. Common understandings regarding the general format and substance of presentation will expedite review and decision-making by the President's Office and, if appropriate, the Board of Regents.

II. OBJECTIVE

The purpose of this policy is to establish a common format for action requests to the President's Office.

III. GUIDELINES

- A. The format of presentation for matters involving action by the President's Office and/or Board of Regents is attached.
- B. This format is a guide and should be adjusted as appropriate to the specific action requested.
- C. Every effort should be made to include relevant information in a clear, concise manner and limit the action memo to three pages or less. Additional pertinent details may be submitted as attachments.
-  D. Action requests requiring changes in Board or executive policies should be accompanied by a draft revised policy with new material underlined and material to be deleted bracketed .
- E. When appropriate, the action request should include a draft of the document required to implement the recommendation, e.g., draft guidelines, instructions, memo or letter to appropriate party, etc.

ACTION REQUEST FORMAT

This format is a guide and should be adjusted as appropriate to the specific action requested.

RECOMMENDATION

The specific action recommended, e.g., recommended policy or procedural change, personnel policy exception, program approval, organizational change, and so on (except where specialized formats already are prescribed).

RECOMMENDED EFFECTIVE DATE

Pertinent time considerations and reasons.

PURPOSE

The intent of the recommendation including relevant assumptions.

SIGNIFICANT FACTS

Listing of significant facts such as:

- Background conditions clarifying the issue and explaining why it arises.
- Previous Board action and/or relevant administrative policies, regulations, and procedures.
- Constraints.
- Financial implications such as cost, funding source, facility needs, etc.
- Relevant program data.
- Individuals or groups affected and consultation with them.

ALTERNATIVES

Listing of alternative course(s) of action with major positive and negative consequences of each.