California State University San Marcos
Division of Academic Affairs

Protocols for Requesting the President's Attendance/Participation in an Event/Meeting Sponsored by an Academic Affairs Unit

The President's Office has revised the protocols for requesting the President's attendance or participation in a campus-sponsored event. **All requests for the President's attendance or participation in a meeting or event must be reviewed and endorsed by the appropriate Unit Administrator and the Provost.** Any requests submitted directly to the President's Office will be returned to the Requestor or referred to the Provost's Office.

Protocols for requests generating from units within the Division of Academic Affairs:

1. *Plan ahead.* The review and confirmation process involves several steps, and the President's calendar often fills months in advance. Further below you will read that the Final Submission of the Checklist Form, including supporting documents, is due to the Provost's Office three (3) weeks prior to the event. Hence, it is recommended that the Initial Submission of your Checklist Form occurs at least six (6) weeks prior to the event; *additional lead time is strongly encouraged*.

2. The President's Checklist, revised July 2019, should be used to request the President's attendance at or participation in an event or meeting.

3. The President's Checklist form will be submitted twice:
   a. **Initial Submission of the Checklist:** Requester submits the completed form to the Provost's Office to request the President's attendance at or participation in a meeting or event.
      i. Please enter as much information as possible on the Checklist. It is understood that some information may not be available until the Final Submission of the Checklist (see 3.b below).
      ii. The Unit Administrator must review and support the request (e.g., College / Library / IITS / OGSR / OUGS / AP / EL Dean, Vice Provost, or AVP).
         1. To indicate the Unit Administrator's endorsement, please enter her/his name in the "Requestor's Name" field, together with the name of the Requestor and/or Department Event Coordinator (e.g., person to contact regarding the event/meeting). The Unit Administrator does not need to sign the form.
         2. Enter the Unit Name in the "Requestor's Name" field (e.g., Faculty Center, CSM, Library, etc.).
         3. In the "Date" field, enter the options under consideration (may propose more than one date/time for the President's consideration when checking her availability).
         4. The Initial Checklist form should be submitted via email attachment to both Maria Shterew (mshterew@csusm.edu) and Pia Bombardier (pbombardier@csusm.edu) for the Provost's review and endorsement. Please copy the Unit Administrator's assistant on the email message.
         5. Upon the Provost's authorization, staff in the Provost's Office will
            a. submit the request to the President's Office,
            b. serve as the liaison between the President's Office and the Requestor, and
            c. communicate the status of the request to the Requestor.
         6. To keep the Unit Administrator apprised of the status of the request, the Unit Administrator's Assistant will be copied on email messages between Provost's Office staff and the Requestor regarding the status of the request (e.g., the President's tentative acceptance of the invitation or her regrets). Typically, action will not be required by the Unit Administrator's Assistant; the cc is for information purposes only.

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b. **Final Submission of the Checklist:** After the President has tentatively accepted the invitation, the Requestor submits the completed Final Checklist to the Provost's Office, updated with all of the final event/ meeting details (final agenda, brief bios of key external participants, briefings, RSVP lists, etc.). The Final Checklist and supporting documents should be submitted via email attachment to both Maria Shterew (mshterew@csusm.edu) and Pia Bombardier (pbombardier@csusm.edu). Please copy the Unit Administrator's Assistant.

   i. **Must be submitted to the Provost's Office three (3) weeks prior to the event/meeting with all supporting documents.** The Final Submission does not require the Unit Administrator's review/endorsement.

   ii. **IMPORTANT NOTE:** The Checklist form states that the final version is due to the President's Office two (2) weeks prior to the event. *This is the Provost's Office's deadline for submitting the completed Checklist to the President's Office.* The three (3) week submission deadline to the Provost's Office allows time for Provost's Office staff to screen the submission for completeness, time to work with the Requestor if modification/clarification or additional documents are needed, and time for the Provost to review and approve the submission of the Final Checklist materials to the President's Office. **There will be no exceptions of the three (3) week due date to the Provost's Office without a compelling written explanation from the Unit Administrator describing the extenuating circumstances for the late submission.**

   iii. Resubmission of a corrected Final Checklist to the Provost's Office must be made promptly in order to meet the President's Office's submission due date of two (2) weeks prior to the event.

   iv. An incomplete Final Checklist will not be submitted to the President's Office.

   v. Final confirmation of the President's attendance at/participation in an event or meeting is pending the President's Office's receipt of the completed Final Checklist and any supporting documents.

   vi. Timely submission of the Final Checklist and any supporting documents is the sole responsibility of the Requestor. Staff in the Provost's Office will not be tracking requests to ensure timely submission.