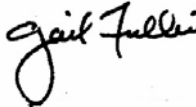




Office of the President • One Washington Square • San Jose, California 95192-0002 • 408/277-3456

May 31, 1984

PD 84-01

MEMO TO: All Management Personnel  
FROM: Gail Fullerton   
President  
SUBJECT: REPORT MANAGEMENT PROCEDURES

The following procedures are hereby implemented, effective immediately, in accordance with San Jose State University's response to Internal Audit Staff Report LAS 83-17, which requires stricter control of our reporting systems.

Requests for data that are received by this University may be divided into three major categories:

- 1) requests for data from the Chancellor's Office, CSU;
- 2) requests, for data from other state agencies and federal government offices that have some regulatory relationship to this University;
- 3) all other requests for data, including those from other universities, scholars, journalists, etc.

The following procedures will apply for each of these categories of request, as identified.

1) Procedures for responding to requests for data from the Chancellor's Office, California State University.

A) All coded memoranda addressed to the President: The President, will assign to an appropriate manager responsibility for gathering the data requested and drafting a response for the President's signature. The President's staff shall maintain a central log in which all coded requests for information from the Chancellor's Office to the President shall be recorded, together with the name of the manager who has been assigned by the President to gather the required information, the date the report is due, and the date that the draft is to be in the President's office for review and signature.

When the response to the Chancellor's Office is sent by the President, each campus office involved in the preparation of the response shall be copied.

If the response to the Chancellor's Office is to be sent over the signature of an administrator designated by the President to respond on behalf of the campus, a draft copy shall be sent to the President for approval prior to the transmission of the final report to the

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Chancellor's Office.

B) All coded requests on which the President is copied: Such requests shall be handled as delineated in procedure 1-A.

C) All coded Memoranda or other written requests to the campus from the Chancellor's Office which are not addressed to the President and on which the President is not copied: Such requests shall be forwarded immediately to the President's Office and handled as delineated in procedure #1-A.

D) Uncoded written and oral requests: The Chancellor's Office is expected to eliminate the former and to reduce the latter to only those oral requests absolutely necessary because of time constraints. Presumably requests sent by means of electronic mail will also be limited to those absolutely necessary because of time constraints. The President's Office shall be informed immediately of any oral requests, uncoded written requests, or electronic mail requests for information directed to any office or individual on campus by the Chancellor's Office. Upon receipt of such information, the President's Office shall provide direction for the preparation of the response'.

2) Procedures for responding to requests for data from other state agencies and federal government offices that have some regulatory relationship to this University.

A) Requests for data from other state agencies and federal offices that are directed to the President: The President will assign to an appropriate manager responsibility for gathering the data requested and drafting a response for the President's signature. The President's staff shall assign an identifying code to all requests for information from other state agencies and federal offices having a regulatory relationship to this campus and maintain a central log in which such requests are recorded, together with the name of the manager who has been assigned by the President to gather the required information, the date the report is due, and the date that the draft is to be in the President's office for review and signature.

When the response to the government agency is sent by the President, each campus. Office involved in the preparation of the response shall be copied.

If the response to the government agency is to be sent over the signature of an administrator designated by the President to respond on behalf of the campus, a draft copy shall be sent to the President for approval prior to the 'transmission of the final report to the agency.

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B) Requests for data from other state agencies and federal offices that are directed to some campus administrator other than the President: Such requests shall be forwarded immediately to the President's Office and handled as delineated in procedure 2-A.

3) All other requests for data, including those from other universities, scholars, journalists, etc.

A) Requests for data from non-governmental agencies and individuals that are directed to the President: Such requests and responses will not be logged. The President will determine whether the information requested is public information and if so, whether it is readily available. If it is public information and readily available, the President will assign responsibility for response to an appropriate campus administrator.

If the information is public information but has not been aggregated in the form requested, the President will ascertain whether the cost of aggregating data and preparing the requested report would be an expenditure of state resources within the educational mission of the University. If so, the President will assign responsibility for response to an appropriate campus administrator. If the information is not public information, or if it has not been aggregated and the cost of preparing the report requested is not deemed by the President to be an appropriate expenditure of state resources, the person or organization requesting the report will be so informed.

B) Requests for data from non-governmental agencies and individuals that are addressed to some campus administrator other than the President: Such requests shall be forwarded immediately to the President's Office and handled as delineated in procedure 3-A.