

Guidelines for Referrals

What are Referrals?

Referrals are the means by which the committees, the campus community, the CSU Academic Senate, other campus academic senates, or any interested party may provide input into the issues the Senate and its many committees will investigate. Referrals are only made to the Executive Committee and the Policy Committees, including the University Library Board. Policy committees may then delegate referrals to particular operating committees, but the policy committee retains responsibility for the original referral.

How to Make a Referral:

Any member of the campus community may request a referral to a Senate policy committee.

For this purpose, the Senate has developed a referral form, a copy of which can be found in this handbook and on the Senate web site. Individuals who wish to submit a referral are highly encouraged to use this form and to provide detailed information regarding the issue to be referred. Information such as the history of the issue, time constraints, or reference materials will assist the Senate in its expeditious consideration of the referral.

Referrals should be addressed to the Senate Chair, who will then forward the referral to the Executive Committee for consideration. Although use of the referral submission form is highly desirable, the Senate Chair will also entertain referrals made via phone, email, or in-person at his/her discretion.

How the Senate Office tracks Referrals:

Each referral submitted to the Office of the Academic Senate is assigned a tracking code. The code designates the policy committee to which the referral was sent, the semester it was sent, and then a simple serial number. For example, "ISA-S17-2" designates the second referral sent to Instruction and Student Affairs in the spring semester of 2017. The Tracking Number is assigned only once the referral form is submitted to the Office of the Academic Senate.

Once the committee has finished their work for a particular referral, the committee must inform the Senate Office in writing of completed referrals and action taken and submit any final documents to be filed with the original referral. For example, when a proposal is sent to the Senate from a policy committee, the policy chair should inform the Senate Office from which referral it developed and whether the proposal concludes all action on that referral.

At times, a committee may end their work on a certain referral by making a new referral to a different policy committee. For example, if curricular implications develop in the referral ISA-S17-2 and the Instruction and Student Affairs Committee agrees this referral should be reassigned, they may conclude that their work is done on the original referral and that a new referral should be made to Curriculum and Research. All steps must be followed to

end the original referral and submit a new referral. The new referral should include as attached materials, the original referral.

Communication between the Senate Office and the Policy Chairs on referrals:

When the Senate Office obtains documents that seem relevant to a particular referral, those documents will be forwarded to the chair of the policy committee with a note advising that the attached documents have been added to the file for a particular referral.

Policy Chairs should also keep the Senate Office informed of all action or change in status of a referral and send copies of all pertinent documents to be included in referral files. It is communication between the policy chairs and the senate office that will keep the tracking of Referral and Referral files updated.

When work for a referral is delegated to an operating committee, the policy committee should send an update on that referral so that referral file may be complete and the Senate Office may keep track of the referral. The tracking of referrals and the updates to referral files by the Senate office is vital to the communicative efforts of the university community, especially when an inquiry is made into the status of a particular referral.

Policy committees may generate their own referrals by going through all the steps in making a referral to themselves. The practice of ensuring that all items of business have a referral number will contribute in the process of keeping policy committees from duplicate work and assist in creating some continuity for the policy committee into the next academic year.

The status of all outstanding and recently completed referrals is reported in policy committee annual reports.