



## **Policy for Business Operations, Meeting and Event Requests, and Signature Procurement for the President's Office**

### **Who We Are:**

The President's Office of Xavier University of Louisiana is responsible for the administration of the University. The President sets and directs the strategic direction of the University, and is responsible for the execution of the vision and goals of the institution reporting directly to the Board of Trustees that acts as a governing body of the University.

The President has a direct staff that consists of the Vice President of Administration/Chief of Staff, Deputy Chief of Staff, the Director of Board Relations, and the Special Projects Coordinator.

### **Purpose:**

This policy provides a best practice approach for interactions with the President's Office concerning its general business operations, requests for internal and/or external appearances, and procurement of signature on various documents (i.e. general correspondence, authorizations, and contracts). The purpose of the policy is to improve operations and facilitate efficient and effective interactions between internal/external constituents and the President's Office in addressing and completing tasks requiring the President's attention.

## **General Business Operations**

### **Calendar Meetings:**

The President's calendar is an important tool by which the President's goals are advanced. Regular calendar meetings including the President, relevant office staff, and relevant staff from reporting units responsible for university-level external initiatives (i.e. advancement/donor relations, marketing/events, alumni relations, trustees, board committees, etc) are recommended to aid in the president's productivity, imaging/public relations efforts, and to promote a shared understanding between the President and staff regarding priorities and time management preferences.

**NOTE:** The Special Projects Coordinator is the primary point of contact for the President's calendar.

### **Meeting Requests:**

The President is interested in hearing from the faculty, staff and students of the University. All are encouraged to attend the structured forums, town hall meetings, Faculty and Staff Institute, and other university events.

All meeting requests should be submitted to [president@xula.edu](mailto:president@xula.edu) for review by the President's staff. At a minimum, the requestor must provide the date, time, location, reason, and topic for the meeting. When possible, the request should be made within 30 days of the meeting date, and any relevant briefing materials should be submitted a minimum of 1 but preferably 2 weeks prior to the meeting or upon earlier request of the President or the President's staff.

All meeting requests are reviewed with the President and, depending on the meeting topic or scheduling conflicts, may be referred to another appropriate university official or department for timely resolution. The President's staff attempts to confirm as many meetings as the schedule allows. However, it is not possible to accept all meeting requests.

### **Event Requests:**

All internal and external event requests should be submitted to [president@xula.edu](mailto:president@xula.edu). At a minimum, the requestor must provide the date, time, location, reason, and topic for the meeting. For external event requests, the requestor should also specify the benefit to the institution. When possible, requests should be received a minimum of 4 but preferably 6 weeks in advance of the event to ensure adequate time for preparation.

Requests will be evaluated based on the President's availability, institutional objectives, annual priorities, and prior obligations.

The President's Office has a list of university representatives authorized to represent Xavier at approved internal and external events. Accordingly, the President may assign another administrator to represent the university or attend on his behalf. This could include the Provost, Dean, a member of the Cabinet, or faculty/staff leadership.

### **To Request Correspondence from the President:**

For correspondence from the President in support of area initiatives, the requesting department should submit the purpose, facts, and timeline of the correspondence. The requesting department should also submit a draft of the correspondence requiring signature to [president@xula.edu](mailto:president@xula.edu) as an

electronic file for review and editing as needed by the communication manager assigned to executive communications.

The Vice President of Administration/Chief of Staff will make final edits and submit for approval and presidential signature. Some letters may be deemed more appropriate for signature by members of the Cabinet or leadership team.

A three-week notice prior to the dissemination date is requested for correspondence. All correspondence requests are logged and responded to in the order in which they are received. Requests will be expedited only at the discretion of the President and/or Vice President of Administration/Chief of Staff.

### **Document Signatures:**

All documents for signature should be submitted to [president@xula.edu](mailto:president@xula.edu) for processing a minimum of one-week prior to the requested date needed for pick-up. The submitter will be contacted with any questions or edits and to pick up the signed document.

All documents must be submitted with proof of approval by the department's Director/AVP/VP. It is the responsibility of the submitting department to create a departmental routing sheet that indicates approval by the aforementioned department approver.

### **To Request Contract Signature:**

All contracts for signature must be submitted in full with supporting documentation including the budget code funding the project, the statement of work, all terms and conditions detailed in standard contract form required by procurement guidelines and contractual terms established by Xavier University's legal representative and fiscal services.

In addition, a signed routing sheet is required with all contracts for signature prior to submission to the President's Office. The Vice President of Administration/Chief of Staff will conduct a final review for compliance to guidelines and submit to the President and/or Provost for final signature and approval. Some contracts may be referred to Xavier University's legal counsel for review of terms.

Any transaction exceeding \$1,000,000.00 and facilities contracts exceeding \$500,000.00 require board authorization. A signed and approved resolution must be attached prior to submitting for signature.

Staff members with signature authority on contracts are prohibited from signing contracts that obligate the University to long-term retainer agreements that annualize at a dollar value that

exceeds their signature authority. Signature authority levels are set on an annualized cost basis, not on a monthly expense basis.

Amendments or addendums to contracts must be submitted with the original contract attached. The amendment or addendum must include all terms being amended and reference original contract terms being changed.

Contracts should be submitted for signature on Mondays by noon for an expected return by COB Friday. All contracts are subject to review by the Vice President of Administration/Chief of Staff, Provost, President, Vice President of Fiscal Services, and legal team at the discretion of the final approving parties.

All contracts must be logged in with administrative staff in the President's office and logged out when ready for pickup.

Attachments for use with this contract procedure:

- Procurement Guidelines
- Routing Sheet
- Signature Authority Matrix
- Signed/Approved Resolution if exceeds \$1,000,000.00 (all commitments) or \$500,000 (facilities contracts)

### **To Request Expense and Travel Reimbursements**

All expenses for reimbursement, p-card expenditures, and travel reimbursements or expenses for signature must be submitted in full with supporting documentation including the budget code funding the project, verification that funds are available for the expense, and the purpose of expenditure/travel.

All travel must receive prior authorization from the President or his designee via the employee travel form. The signed and approved form must be attached to the reimbursement form prior to signature.

## **Working with the Office of the President:**

**Point of Contact for meetings/scheduling requests for the President and Vice President of Administration/Chief of Staff:**

Primary:  
LaTanya Graham, Special Projects Coordinator  
504-520-7542  
[lgraham2@xula.edu](mailto:lgraham2@xula.edu)

Secondary:  
Rae Borden – Deputy Chief of Staff  
504-520-7539  
[rborden@xula.edu](mailto:rborden@xula.edu)

**Point of Contact to submit correspondence, request events or appearances:**

[president@xula.edu](mailto:president@xula.edu)

**Point of Contact for Business/operational inquiries**

LaTanya Graham, Special Projects Coordinator  
504-520-7542  
[lgraham2@xula.edu](mailto:lgraham2@xula.edu)

**Point of Contact for Presidential Communications**

Primary:  
Patrice Bell – Vice President of Administration/Chief of Staff  
504-520-7276  
[pbellmer@xula.edu](mailto:pbellmer@xula.edu)

**Point of Contact to submit contracts, signature requests, requests requiring special handling for the President or Vice President of Administration/Chief of Staff:**

Rae Borden – Deputy Chief of Staff  
504-520-7539  
[rborden@xula.edu](mailto:rborden@xula.edu)

**Institutional Strategic Initiatives:**

Rae Borden – Deputy Chief of Staff  
504-520-7539  
[rborden@xula.edu](mailto:rborden@xula.edu)

**Board of Trustees Inquiries**

Kris Pottharst – Board Liaison  
504-520-5441  
[kpotthar@xula.edu](mailto:kpotthar@xula.edu)

**Vice President of Administration/Chief of Staff:**

Patrice Bell  
504-520-7276  
[pbellmer@xula.edu](mailto:pbellmer@xula.edu)