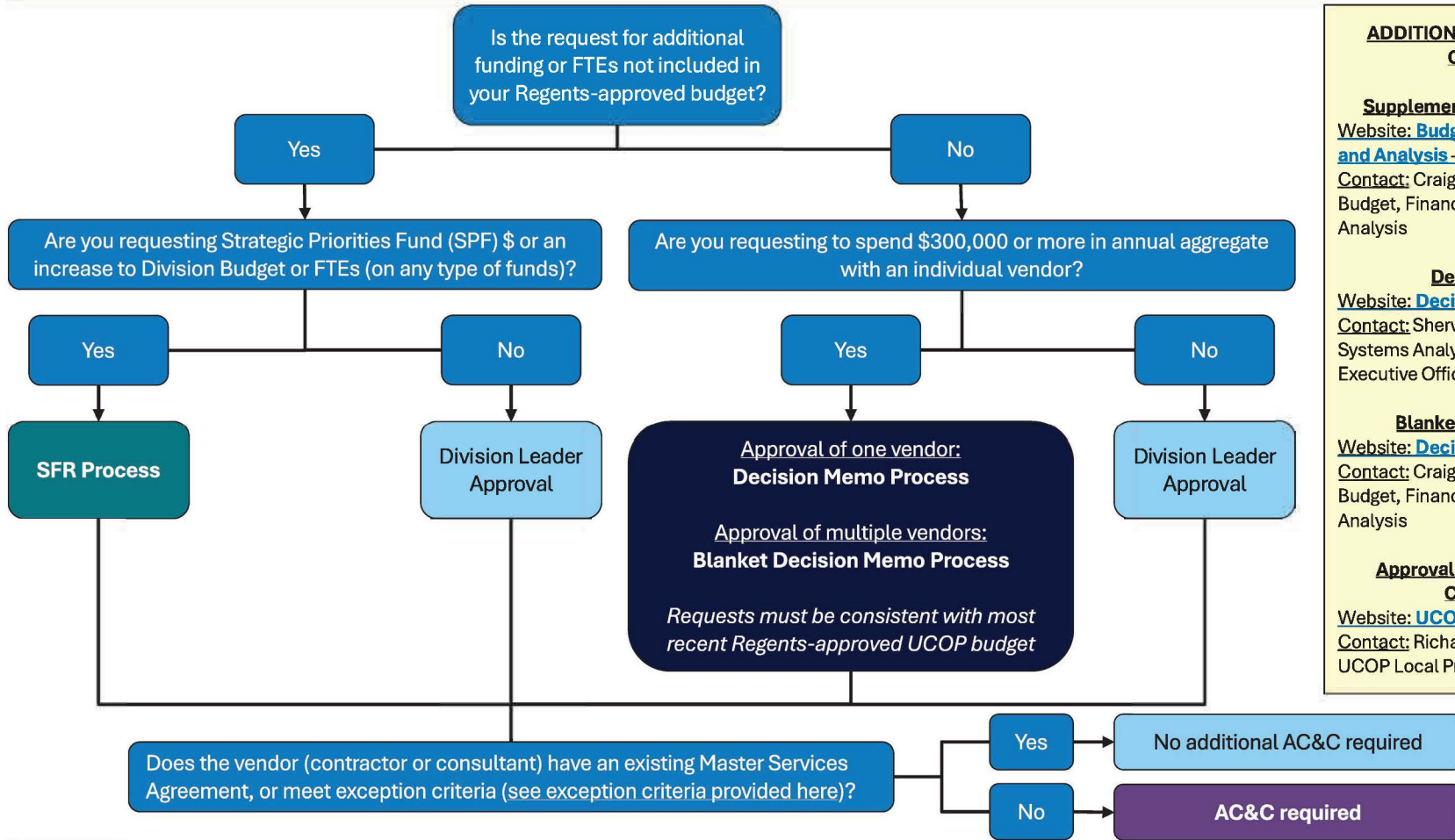


GUIDELINES FOR UCOP BUDGET AUTHORIZATION AND SPEND



ADDITIONAL INFORMATION & CONTACTS

Supplemental Funding Request
 Website: [Budget, Financial Planning and Analysis](#) – under “Resources”
 Contact: Craig Kitaoka, Director, Budget, Financial Planning and Analysis

Decision Memo
 Website: [Decision Memo process](#)
 Contact: Shervy Thao, Business Systems Analyst II, President’s Executive Office

Blanket Decision Memo
 Website: [Decision Memo process](#)
 Contact: Craig Kitaoka, Director, Budget, Financial Planning and Analysis

Approval of Contractors and Consultants
 Website: [UCOP Local Procurement](#)
 Contact: Richard Greene, Manager, UCOP Local Procurement

Guidelines for UCOP Budget Authorization and Spend

1. Is the request for additional funding of FTEs not included in your Regents-approved budget?
 - a. If yes: Are you requesting Strategic Priorities Fund (SPF) \$ or an increase to Division Budget or FTEs (on any type of funds)?
 - i. If yes: SFR Process
 - ii. If no: Divisional Leader Approval
 - b. If no: Are you requesting to spend \$300,000 or more in annual aggregate with an individual vendor?
 1. If yes: Requests must be consistent with most recent Regents-Approved UCOP budget
 - a. Approval of one vendor: Decision Memo Process
 - b. Approval of multiple vendors: Blanket Decision Memo Process
 2. If no: Division Leader Approval
2. Is the vendor (contractor or consultant) already approved by UCOP Local Procurement?
 - a. If yes: No additional AC&C required
 - b. If no: AC&C required
3. Additional Information and Contacts
 - a. Supplemental Funding Request
 - i. Website: Budget, Financial Planning and Analysis under “Supplemental Funding Requests” Tab
 - ii. Contact: Craig Kitaoka, Director, Budget, Financial Planning and Analysis
 - b. Decision Memo
 - i. SharePoint Site: President’s Executive Office
 - ii. Contact: Shervy Thao, Business Systems Analyst II, President’s Executive Office
 - c. Blanket Decision Memo
 - i. Website: Budget, Financial Planning and Analysis under “Decision Memo process” tab
 - ii. Contact: Craig Kitaoka, Director, Budget, Financial Planning and Analysis
 - d. Approval of Contracts and Consultants
 - i. Website: UCOP Local Procurement
 - ii. Contact: Richard Greene, Manager, UCOP Local Procurement