

October 16, 2018

OFFICE OF PLANNING AND BUDGET

RE: Office of Planning and Budget Protocol for Reviewing and Signing Documents

The following table specifies our internal protocol for reviewing and signing documents directed to the Office of Planning and Budget. All exceptional requests require my approval.

Document	Originating Office	Reviewer/Signatory
Intercampus letters/responses to UCOP	Planning and Budget	CFO/VC Ronald Cortez
Review of memos for the Provost's signature	Planning and Budget	CFO/VC Ronald Cortez
Declarations of Intent (e.g., UCIMC Equipment, etc.)	Budget Office	CFO/VC Ronald Cortez
Unrecorded Rights Verification	Budget Office	CFO/VC Ronald Cortez
Release of Retention and other escrow documents	Budget Office	CFO/VC Ronald Cortez
Program Planning Guide (PPG), Capital Project Checklists, and other Capital Project Approval Packages	Capital Planning and Space Management	CFO/VC Ronald Cortez
Leases/Subleases, Entry Permits, Facility Use Agreements, License Agreements/Renewals, Easements, and other Real Estate Docs (per Irvine Delegation of Authority)	Real Estate Services	CFO/VC Ronald Cortez
Form 1-140 Financial Affidavit	Academic Personnel	Dir Katherine Gallardo or Dir Free Moini
Mortgage Origination Program (MOP) Approvals	Real Estate Services	Dir Free Moini
Supplemental Housing Loan Approvals	Real Estate Services	Dir Free Moini
Faculty Recruitment Allowance Approvals	Real Estate Services	Dir Free Moini
Requests related to Enrollment	Various Offices	AVC Ryan Cherland
Requests for Institutional Research	Various Offices	AVC Ryan Cherland

Sincerely,


Ronald S. Cortez, JD, MA

cc: Mary Clark, Chief of Staff
Debbie Hunt, Senior Executive Assistant