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ARTICLE I. UNIVERSITY ORGANIZATION

SECTION 1. THE UNIVERSITY AND THE CAMPUS

The role of the University of Illinois in the state as a leader in public graduate and professional education rests upon its organic wholeness. It is not a loose federation of universities, nor is it a system of totally independent units. The mission to which the University is committed, and upon which its development thus far has been based, starts with an emphasis on the fundamental responsibility of the University as a whole. The specific contributions that each campus makes to the university's mission are diverse, since they reflect the needs and methodologies appropriate to different settings; but the campuses are alike in the broad nature of their public responsibilities, in their basic educational policies, and in their institutional quality; and they are integrated by a university-wide organization designed to maximize their educational effectiveness and the efficient use of their academic resources.

The campuses of the University of Illinois share common goals, even though each makes a highly differentiated contribution to the university's mission. The campuses are assisted and strengthened by intercampus cooperation and by university-wide services, while carrying out their academic functions with a high degree of delegated authority. The campuses are expected to achieve intercampus cooperation, to avoid unnecessary duplication, to develop missions responsible to their particular orientation and setting, and to build upon and to foster faculty and staff strengths and initiatives. The campuses are encouraged to operate at qualitatively equivalent levels, even though each of them provides different services for varied clientele.

SECTION 2. FUNCTIONS OF THE UNIVERSITY ADMINISTRATION

(a) The university administration has general responsibility for the entire operation of the University and has the following specific functions to be executed consonant with the policies and actions of the Board of Trustees:

- (1) The enunciation of the mission of the University of Illinois; the development of long-range, comprehensive plans for the attainment of that mission; and the development of a plan of evaluation on a regular basis of the success of the University in meeting that mission.
- (2) Seek to obtain the resources necessary to permit the support of plans and the development of facilities to meet the mission of the University.

- (3) Recommend the allocation of resources, as available, to the campuses and to other units of the University within the requirements and the priorities of the long-range, comprehensive plan for the attainment of the mission of the University.
- (4) The development of relationships both within Illinois and elsewhere to ensure that the University plays its appropriate role as a member of the larger educational community.
- (5) The coordination of the operation of the various components of the University to ensure that the University functions as an organic university rather than as an aggregation of unrelated campuses and capitalizes upon the advantages of its resources as a system.
- (6) The administration of university-wide education and support programs. Examples include the Institute of Government and Public Affairs and the University Press.
- (7) The management of tasks which should be accomplished at the university level either for efficiency or to ensure the consistency necessary to permit the University and the Board of Trustees to meet their responsibilities.
- (8) The development of public information programs to accomplish understanding of and support for the mission and activities of the University of Illinois.

(b) In addition to the president, the university officers are the vice presidents, including the vice president for academic affairs, the vice president/chief financial officer, the vice president for planning and administration, and the vice president for technology and economic development ~~and corporate relations~~, the chancellors, the university counsel, the secretary of the University, all of whom report directly to the president, and such additional administrative officers as shall be designated by the president after consultation with the University Senates Conference. Prior to recommending to the Board of Trustees the initial appointment of any university officer except for the president and the chancellors, the president shall seek the advice of the University Senates Conference. On the occasion of the reappointment of any university officer, the University Senates Conference may submit its advice if it so elects.

(c) Functioning under authority delegated by the president, the vice president for academic affairs is the senior academic officer of the University, serving as advisor to the president on matters of educational policy; academic programs, academic personnel actions, capital and operating budget developments, including the establishment of criteria for judgments as to priorities for resource allocation; and on such other matters as

the president may designate. The vice president for academic affairs is responsible for the overall coordination of planning and budgeting at the University and also works closely with academic leaders on each campus and with other university officers to assist in the advancement of academic programs and to ensure overall coordination.

(d) Reporting directly to the president, the vice president for technology and economic development is the senior officer of the University serving as an advisor to the president on matters of intellectual property, technology commercialization, and related economic development activities. The vice president for technology and economic development is responsible for coordinating and managing the University's technology commercialization and related economic development initiatives including relevant offices, policies, and programs, and, in so doing, exercises direct line authority over the University's major offices and entities involved in technology commercialization and related economic development.

(e) The chancellor, under the direction of the president, is the chief executive officer for the campus. The chancellor has responsibilities and performs duties delegated by the president of the University. Among those responsibilities and duties are: participation in the university's overall planning, allocation, and evaluation operations; application of university-wide policies; review of academic programs and policies; student affairs; and safety of personnel and property.

(f) There may be additional administrative officers with university-wide responsibilities and duties as delegated by the president of the University. The president may make changes in titles and assignment of responsibilities of officers and may recommend to the Board of Trustees additional administrative positions as provided for in Article I, Section 2 of the University *Statutes*.

ARTICLE II. BUSINESS ORGANIZATION AND POLICIES

SECTION 1. THE COMPTROLLER

As an officer of the Board of Trustees, and in accordance with the Bylaws of the Board, the comptroller shall:

(a) Approve for the board all expenditures for which a general or specific appropriation has been made by the board.

(b) Assist the finance and investment committee of the board in matters pertaining to the handling of funds and investments.

(c) Report to the board quarterly the financial condition and operation of the University and on other matters at times as the board may direct.

(d) Sign contracts to which the University is a party unless otherwise ordered by the board in specific cases.

(e) Perform such other functions as may be assigned by the Board of Trustees.

**SECTION 2. THE VICE PRESIDENT/CHIEF FINANCIAL OFFICER
ADMINISTRATION**

Functioning under authority delegated by the president, the vice president/chief financial officer ~~for administration~~ shall: be the general business officer of the University and be responsible for the business and financial functions of the campuses of the University, including the business and finance components of all capital project development and implementation.

~~(b) Devise and install suitable systems for the administrative (business?) functions of the University.~~

~~(c) Designate the place and manner in which administrative (business?) records shall be maintained.~~

SECTION 3. BUSINESS POLICIES AND PROCEDURES

(a) No financial obligation shall be entered into except on authority of the board and after a general or specific appropriation has been made by the board allocating funds therefore, as evidenced by its records, and after having been approved by the vice president/chief financial officer ~~vice president for administration~~. All allocations of funds made by the Board of Trustees, including those made from funds appropriated to the University by the State of Illinois, shall expire at the end of the fiscal year, June 30, unless otherwise especially ordered.

(b) For accounting purposes, the fiscal year of the University shall begin with the first day of July of each year and end on the thirtieth day of June next succeeding.

(c) No department or unit shall receive any monies directly unless authorized by the vice president/chief financial officer ~~for administration~~ to do so. All monies shall be accounted for and paid over in such manner as the vice president/chief financial officer ~~vice president for administration~~ shall direct.

(d) The vice president/chief financial officer ~~vice president for administration~~ is authorized to establish and administer petty cash funds where necessary for the prompt and efficient handling of university business, provided that no single fund of more than \$1,000 may be established without specific action of the Board of Trustees. The board shall designate the banks in which petty cash funds in excess of \$1,000 may be deposited.

(e) The vice president/chief financial officer ~~vice president for administration~~ is permitted to act as treasurer of student and other organizations affiliated with the University, but in so doing shall not thereby create any liability on the part of the Board of Trustees of the University of Illinois. In all cases, the accounts of these organizations shall be kept separate from the university accounts, and the funds of such organizations shall be kept apart from university funds.

(f) All employees shall be bonded in adequate amount and form, to be determined by the board, the expense thereof to be paid by the University.

SECTION 4. AWARD AND EXECUTION OF UNIVERSITY CONTRACTS

(a) Purchases, construction contracts, and other contracts shall be awarded by the Board of Trustees in accordance with applicable state and federal law and with regulations adopted by the Board of Trustees. Contracts involving major changes in or deviations from university policy shall be approved specifically by the Board of Trustees.

(b) All contracts, other than purchase orders, shall be executed at least in duplicate, and the original thereof shall be filed with the secretary of the Board of Trustees and remain in the custody of the secretary. A report shall periodically be made to the Board of Trustees by the comptroller of all contracts executed on behalf of the University, as the board may require.

(c) Contracts relating to appointments to the staff may be executed by the secretary of the Board of Trustees. Agreements providing for the appointments of resident physicians and dentists may be executed by the chief of staff of the University of Illinois Hospital. Purchase orders issued pursuant to awards made by the Board of Trustees may be signed by the university official in charge of the purchasing activity as designated by the vice president/chief financial officer ~~vice president for administration~~. Unless otherwise ordered by the Board of Trustees in specific cases, other contracts to which the University is a party shall be signed by the comptroller of the Board of Trustees and attested to by the secretary of the Board of Trustees.

(d) Procurement contracts involving expenditures of university funds are governed by *Procurement Rules of the Chief Procurement Officer for Public Institutions of Higher Education* as adopted and amended from time to time by the Board of Trustees. Other university contracts may be awarded to any business entity, including those in which a university officer or employee (or members of their immediate families) serve as major officers or primary employees thereof or hold a significant equity interest therein, if such contract is deemed in the best interests of the University and has the approval of the president or the president's designee. Documentation of such approval shall be filed with the contract.

(e) When purchases or contracts are to be awarded by the University on the basis of sealed bids, such bids shall be opened in the presence of at least one member or officer of the Board of Trustees or a designated representative.

(f) Purchases, contracts, change orders, and leases involving payments by the University in one fiscal year in excess of such dollar amounts as the Board of Trustees may specify from time to time shall be specifically authorized by the Board of Trustees unless in the opinion of the president of the University necessity requires immediate action, in which case the president shall act to approve the transaction on behalf of the Board of Trustees and report the same promptly to the board. If the amount involved in such an emergency transaction is in excess of \$500,000 but not more than \$1,000,000 the president will not approve the transaction without first consulting individually those members of the executive committee of the board who can reasonably be contacted before the emergency action must be taken. Similar consultation must occur with all board members who can reasonably be contacted before presidential action on an emergency transaction of over \$1,000,000.

(g) The vice president/chief financial officer ~~vice president for administration~~ is authorized to approve on behalf of the Board of Trustees purchases, contracts, leases, and contract change orders not requiring prior specific board authorization and shall report such approvals to the board as the board may direct. The requirement for specific board approval above dollar amounts the Board of Trustees may specify does not apply to the execution of or supersede previous actions of the board authorizing the execution of those types and classes of purchases, leases, and contracts which the Board of Trustees has authorized to be executed without its prior specific approval, such as farm leases, purchases of food products, grain, livestock, fertilizer, natural gas, generic commodities purchased on joint bids with other State institutions, purchases for resale to students and others, and other commodities which the board may exempt, cultural and entertainment presentations, subcontracts under contracts for research, gifts or grants, University Press publications, and any other transactions which the board may specify.

(h) The seal of the University shall be in the custody of the secretary of the Board of Trustees.

(i) The comptroller and secretary are authorized to delegate to responsible members of the staff of the University authority to execute and attest to contracts in the name of the comptroller and the secretary of the board.

(j) All bids received for a specific item or project may be rejected, without referral to the Board of Trustees, when they are considered to be excessive or unsatisfactory as follows:

- (1) By a director of purchases, when received as a result of bids solicited by such director for purchases of goods, services, equipment or

commodities, such rejections to be reported to the vice president/chief financial officer ~~vice president for administration~~.

- (2) By the president, on buildings and construction, upon the recommendation of the vice president/chief financial officer ~~vice president for administration~~, on items over \$25,000, such rejections to be reported to the Board of Trustees as the board may require.
- (3) By the vice president/chief financial officer ~~vice president for administration~~, on buildings and construction on items under \$25,000, such rejections to be reported to the Board of Trustees as the board may require.

(k) The comptroller is authorized to execute subcontracts for research if the costs are to be paid entirely from contract funds and the subcontracts have been approved by the University's prime contractor. In each case, the subcontract shall be reported to the Board of Trustees as the board may require.

SECTION 5. DRAFTING AND APPROVAL OF UNIVERSITY CONTRACTS

(a) Contracts shall be drafted in tentative form by the university officer best acquainted with the subject matter thereof and in whose department lies the responsibility for performance and approved by the vice president/chief financial officer ~~for administration~~ unless otherwise provided by the *Statutes* of the University or by other action of the Board of Trustees.

(b) All contracts prior to the execution thereof shall be approved as to legal form and validity by the university counsel. Such approval is to be endorsed in writing on the contract, provided that such approval and endorsement shall not be required with respect to individual contracts or extensions or renewals thereof if the form has prior approval by the university counsel as a standard and contains no substantive changes or additions other than those pertaining solely to the description of the project, the amount involved, and the term of the contract or extension.

SECTION 6. RESEARCH GIFTS, GRANTS, AND CONTRACTS

(a) Research conducted under the auspices of the University may be supported in whole or in part through funds provided by outside entities in the form of research gifts, research grants, or research contracts. Such arrangements must be approved before acceptance by the president or the president's designee. Staff members may conduct preliminary negotiations with prospective supporters of research with the prior knowledge and approval of the department head or other appropriate administrative officer and the dean or director if required by college policy but have no authority to bind the University

to enter into a contract. Such research programs shall be controlled and directed by the University and shall be conducted within the appropriate department(s) by members of the university staff. The administrative coordination of such programs shall be under the Agricultural Experiment Station for units in the College of Agricultural, Consumer and Environmental Sciences; and the Engineering Experiment Station for units in the College of Engineering at the Urbana-Champaign campus, and the Campus Research Board for all other units of the Urbana-Champaign campus, and all units of other campuses. On a campus without a Campus Research Board, the Provost shall be responsible for such administrative coordination.

(b) Contracts for research shall specify that the results of scientific research conducted by the University, including inventions and discoveries, are the property of the University, to be used for the benefit of the University and the public, but the sponsor may receive preferential consideration in the disposition of the invention or discovery as provided in Article III, Section 7(p).

(c) Except as may be otherwise specified by the Board of Trustees, the University shall not enter into an agreement with a sponsor which will give a sponsor permanently the exclusive benefits of the results of such investigation or research. The original records of any investigation shall be held by the University, but reports or copies of such records may be furnished to the sponsor. The University shall have the exclusive right to publish, at its discretion, the results of scientific investigation and research unless provided otherwise in contracts with agencies of the United States Government. No account of a cooperative research project or reprints of scientific articles resulting from the investigation shall be published by the sponsor or by any other agency except with the consent of the University. The sponsor shall not use the name of the University in any advertisement, whether with reference to a cooperative investigation or otherwise, without the prior approval of the president of the University or the president's designee.

(d) If conditions imposed by the sponsor require the waiver of established university policies with respect to reimbursement of indirect costs or rights of publication, such conditions may be accepted by the University if required by Federal law or regulation. Similar conditions may be accepted by the University for any other sponsor when the committee specified in paragraph (f) below determines such acceptance to be clearly in the interests of the University and the public.

(e) The University accepts funds for research from sponsors outside the University by an outright gift, by a grant, or by a written contract.

- (1) **Research Gifts.** Gifts for research which are limited in amount may be arranged by informal negotiations and correspondence between the sponsor and the staff member who will carry on the research, subject to acceptance as hereinafter provided. The chancellor at each campus is delegated by the president to approve and accept such gifts for the University. Financial arrangements for gifts shall be reviewed and approved by the Office of Business and Financial Services Affairs. Consideration of the direct and indirect costs to the University accruing on account of the acceptance of gifts shall be made at the time of budgeting the funds to be received.
- (2) **Research Grants.** Grants for research are ordinarily made to the University by foundations, associations, or other agencies which are governmental or nonprofit in character. A research grant is differentiated from a gift in that a grant usually carries certain conditions imposed by the sponsor. Applications for grants should be prepared by the staff member who will supervise the research, approved by the head or chair of the department and the dean or director if required by college policy, and presented to the Office of Business and Financial Services Affairs for review and approval of financial details. Applications should be accompanied by a budget which shall give consideration to all direct and indirect costs involved. After approval by the Office of Business and Financial Services Affairs, applications for grants shall be considered for approval by the chair of the Campus Research Board of the Urbana-Champaign and Chicago campuses. Grants carrying conditions the legality of which may be questionable shall also be referred to the university counsel.
- (3) **Research Contracts.** Contracts for research shall be used when required by the sponsor or when it is desirable to set forth the specific conditions under which funds are to be received and administered. The university standard cooperative agreement contract form shall normally be used for projects with private sponsors. Contracts prepared by the sponsors may be used for projects with agencies of the United States Government, state governments, and in some cases private sponsors.

After informal negotiations with the sponsor, the staff member who is to supervise the project shall prepare a proposal specifying in detail the research work to be carried on and the financial and other conditions. A budget shall be prepared which will provide for all direct costs of the project and the indirect costs to be reimbursed to the University. Such a proposal and accompanying budget shall be approved by the head or chair of the department and the dean or director if required by college policy and submitted to the

Office of Business and Financial Services Affairs. After review and approval by the Office of Business and Financial Services Affairs, it shall be submitted for approval to the vice chancellor for research if such a position exists on the campus. It shall then be returned to the Office of Business and Financial Services Affairs for submission to the sponsoring agency, such submission to constitute the formal offer of the University to carry on the research subject to the university's requirements for execution of a formal contract.

If the contract is with a private sponsor and the amount involved is relatively small, the university standard contract form may be completed by the staff member and submitted with accompanying budget for university approval in accordance with procedures stated above. A proposal shall not be required under such conditions.

Contracts prepared by sponsors shall be referred to the Office of Business and Financial Services Affairs for examination as to financial terms and conformance with university policy.

After a proposed contract has been negotiated and reviewed by the Office of Business Affairs and Financial Services, it shall be approved by the department which is to conduct the investigation, the assistant vice president for business and finance, the university counsel, and signed by the comptroller and attested to by the secretary of the Board of Trustees who may authorize responsible members of their staffs to execute contracts on their behalf.

(f) Gifts, grants, and contracts for research may provide for all or a part of the costs of a research project. When the funds from the sponsor are to cover all or substantially all of the costs, the following items should be considered in the preparation of the budget: salaries and wages, employer's contribution to the State Universities Retirement System, allowance for Worker's Compensation and Occupational Disease liability, expendable supplies, equipment, travel expenses, other direct costs, and an allowance for indirect costs to the University. The amount budgeted for indirect costs in any proposed project shall be reviewed and approved by a committee composed of the vice chancellor for research if such a position exists on the campus, if not, the provost; a representative of the appropriate research unit or department carrying on the project and a representative of the Office of Business Affairs and Financial Services. In determining the amount to be budgeted for indirect costs, the committee shall give consideration to the respective benefits which will be received from the investigation by the sponsor, the University, and the public. The expenditure of funds received as reimbursement for indirect costs of research or other university activities, as cost-of-education allowances, as general-support grants ("institutional grants," "general research-support grants," etc.), or as any other category of gift or grant not restricted as to use by the donor or by other regulations of the Board of Trustees requires authorization by the Board of Trustees. This may be done either by: (1) approval as part of the university's annual budgets for

operations or for capital improvements, or (2) approval during the fiscal year as an addition to the annual budget for operations or for capital improvements.

(g) The University is often requested to accept grants and contracts providing for extension work or teaching services. Policies and procedures set forth in this section and in Section 7 shall apply to such grants and contracts, except that funds appropriated by the United States Government to the Agricultural Experiment Station or the Illinois Cooperative Extension Service shall be administered by the College of Agricultural, Consumer and Environmental Sciences.

SECTION 7. OTHER GIFTS AND GRANTS, SCHOLARSHIPS AND ENDOWMENTS, NONMONETARY GIFTS

(a) **Gifts and Grants.** Gifts and grants for purposes other than research may be accepted from entities outside the University under conditions specified in this Section. Staff members may conduct preliminary negotiations with prospective donors or grantors with the prior knowledge and approval of the department head or other appropriate administrative officers, but are not authorized to bind the University to accept a gift or grant. Gifts are accepted by the president of the University who may delegate the acceptance authority to others.

(b) **Scholarships and Fellowships.** Scholarships are gratuitous payments to students to provide financial assistance during the period of their training. Fellowships are awards involving cash stipends for graduate students. In certain exceptional cases, fellowships may be granted to postdoctoral scholars. Fellowships are intended to assist the recipient pursuing educational objectives; they are not awarded for carrying on specific research, and no services shall be required of a fellow by the University.

The president is authorized to accept funds for scholarships and fellowships. The president may delegate authority for accepting scholarships and fellowships to the chancellors or to the chancellors' designees.

Funds for scholarships and fellowships shall not be accepted under terms which require prohibited discrimination.

When funds are received from a donor for fellowships or scholarships, neither the University nor the student recipients shall be obligated to the donor in any way except to comply with the terms of the gift and to ensure that established academic requirements are met. The recipient of a scholarship or fellowship shall be chosen by appropriate university units in accordance with established criteria based upon scholastic attainment and financial need unless the funds are accepted under other terms.

The vice president/chief financial officer ~~vice president for administration~~ may receive and disburse funds for a donor who wishes to designate the recipient of a grant

for financial assistance. In such circumstances, the vice president acts only as the agent of the donor; the funds thus received are not university funds; and the funds thus administered, although perhaps designated as a scholarship or fellowship by the donor, have no official university status.

(c) **Endowment Gifts.** The conditions of the gift as stated by the donor ordinarily specify the use to which the principal and income shall be put although the determination may be left to the Board of Trustees. Gifts may be received and accepted with the condition that the principal sum thereof shall be either held intact as an endowment or expended upon authorization of the Board of Trustees. The University may temporarily transfer funds to an endowment status to be invested and only the income expended. Such funds are designated as "funds temporarily functioning as endowment" or as "quasi-endowment funds."

The terms of an offer of a gift to create an endowment shall be reviewed by the department concerned, the appropriate campus administrator, the university counsel, and the vice president/chief financial officer ~~vice president for administration~~. The president may accept offers of endowment funds, reporting the gift when received to the Board of Trustees as the trustees may direct. The president may delegate authority to act on such offers to the chancellors. No endowment fund money may be accepted under terms which require prohibited discrimination.

(d) **Nonmonetary Gifts.** Every offer of a non-monetary gift shall be reported by the unit involved to the chancellor of the campus concerned who is authorized to accept the gift on behalf of the president and who shall report it to the president, who shall report it to the Board of Trustees as the trustees may direct.

No object of art shall be accepted until its artistic quality has been determined.

Loans of nonmonetary property are accepted subject to the condition that the University will take reasonable care of the property but will not be responsible for loss or damage thereto unless otherwise agreed to in writing and approved by the vice president/chief financial officer ~~vice president for administration~~.

SECTION 8. TECHNICAL TESTS

(a) The University may undertake specified tests using unique or special university facilities on a contractual service basis for individuals, institutions, or commercial entities (applicants). In general, such tests are justified when the desired facilities do not exist elsewhere or are not readily accessible and when the work to be performed involves only established, preexisting methods of a primarily technical nature which can be specified in advance. A technical testing contract should not be used if the work entails original, creative research. The University will not perform testing for

external parties if equivalent service is known to be available and feasibly obtainable from a commercial entity.

(b) The unit executive officer is responsible for determining the appropriateness of the work before the University accepts the contract. Such work will be arranged by the unit executive officer with the involved members of the staff in accordance with the nature of their employment as part of their service to the University unless such work is done at times when services are not required by the University. When necessary or desirable, special assistants may be employed to conduct a specified testing project. Subject to conflict of interest review and prior written approval of the unit executive officer and college dean, testing using university equipment and facilities may also be undertaken by individual members of the university faculty or academic professional employees on their own time and responsibility.

(c) A fee shall be assessed for each testing project sufficient to cover all direct and indirect costs of service rendered, including any and all facilities of the University used in carrying out the test and the technical support personnel necessary to operate it.

(d) Both the testing methods and the objectives toward which they will be applied shall be specified in writing as part of the agreement covering the testing work. The University makes no claim of ownership in observational data, measurements, or other results from such specified testing. In general, it is not anticipated that any new science or technology (and resulting intellectual property) would result from such specified testing. However, in special situations, such as when the proposed testing involves an applicant's proprietary technology or specimens or if a specific objective or application of interest to the applicant which is potentially patentable can be identified in advance, the University may agree not to seek a proprietary position in the applicant's intellectual property. Otherwise, inventions and discoveries (hereafter, "inventions") shall belong solely or jointly to the University and/or to the applicant in accordance with the U.S. laws of inventorship and Article III, Section 3. For any such invention in which the University has an ownership interest, the University will grant the applicant a limited first option to negotiate a license to use the University invention on reasonable commercial terms.

(e) The name of the University of Illinois shall not be used in publicity concerning the tests or test results without its prior written permission.

(f) Technical testing agreements shall be approved and executed in accordance with Article II, Section 5, and the policies and procedures provided for each campus by the assistant vice presidents for business and finance.

SECTION 9. DELEGATION OF SIGNATURES

An administrative officer is authorized to delegate to another responsible staff member authority to sign official documents under conditions approved by the vice president/chief financial officer and comptroller ~~for administration~~. Such delegation does not relieve the administrative officer of responsibility for what is done there under.