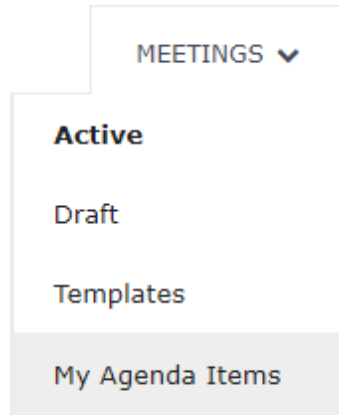


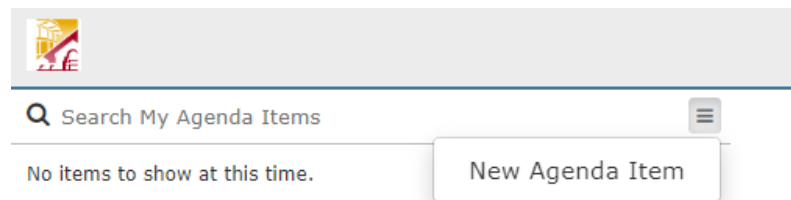
Agenda content contributors can submit their items from the “My Agenda Items area”, under the “MEETINGS” Tab.
(Note: You must have been granted BoardDocs access and be logged-into BoardDocs in order to submit an agenda item. Please coordinate submission of agenda items with your College President’s Office or District Vice Chancellor’s Office to prevent duplicates being submitted.)

To submit agenda items, do the following:

1. Open the MEETINGS tab menu and choose **My Agenda Items**.



2. Click on the three-lined icon shown below and choose **New Agenda Item**.



3. In the editing screen that appears, choose the target meeting from the **Meeting** menu. *(Note: You must choose a meeting date in order to move forward with the following selection.)*
4. Choose the target category from the **Category** menu. *(Note: These categories align with our traditional 1.0, 5.0, 6.0 sections of our Board agendas.)*
5. Enter the item's subject in the **Subject** field. *(Note: This is the title of your Agenda Item. For example, "Approval of Agreement between XX Company and Chabot-Las Positas Community College District, Chabot College/Las Positas College/etc.")*
6. Choose either public or private access from the **Access** menu. *(Note: CLPCCD Board Meetings are always Public.)*
7. Indicate the item's type by enabling desired checkbox(es). *(Note: Items added under "Action (Consent)" are generally standard/routine and non-controversial items.)*
8. If applicable, please align your agenda item with one or more of the Board priorities below by clicking on the priority (or priorities) that are most appropriate so that they appear on the "Attached Goals" side. If you make a mistake, simply click on the Priority that you wish to remove, and it will be removed and returned to the "Available Goals" side (see below).
 - Board Priority #1: Continue to support a culture that fosters diversity, equity, inclusion, accessibility and belonging.
 - Board Priority #2: Expand opportunities that support workforce development.
 - Board Priority #3: Advance and support plans that meet the basic needs of all students.
 - Board Priority #4: Provide effective management and equitable allocation of District fiscal resources.
 - Board Priority #5: Support strategies to attract and retain students.
 - Board Priority #6: Maintain a focus on student academic vision for success and excellence.

Attached Goals

Click attached goals to remove them from this agenda item. You can also drag to sort attached goals.

- BOARD PRIORITY #4: Provide effective management and equitable allocation of District fiscal resources.
Board Priorities
- BOARD PRIORITY #2: Expand opportunities that support workforce development.
Board Priorities

Available Goals

Click one or more available goals to attach them to this agenda item. They will appear in the list to the left.

- BOARD PRIORITY #1: Provide resources and support plans that meet the basic needs of all students.
Board Priorities
- BOARD PRIORITY #5: Support strategies to attract and retain students.
Board Priorities
- BOARD PRIORITY #6: Maintain a focus on student academic vision for success and excellence.
Board Priorities

9. For Action and Action (Consent) Items, enter values or make selections in the following fields:

- **Preferred Date** (Note: The date of the Board meeting that you prefer for your agenda item to go to.)
- **Absolute Date** (Note: The date of the Board meeting that your agenda item must to go to.)
- **Fiscal Impact** (Note: Yes, if there is a fiscal impact associated with your agenda item, i.e. expense or revenue.)
- **Dollar Amount** (Note: The dollar amount of the agenda item, i.e. contract/grant amount.)
- **Budgeted** (Note: Yes, if a requisition has been entered into Banner, and has been approved to the college business-office level.)
- **Budget Source** (Note: Enter source of funding, ex. General Fund or Measure A. FOAP not needed).

10. If you have assigned the "Action" or "Action (Consent)" agenda type, enter the recommendation for Board action in the **Recommended Action** field.
(Sample Language) "That the Board of Trustees **accepts/approves/endorse**s the **"ADD SUBJECT LINE"**. It is further recommended that the Board authorizes the Vice Chancellor of Business Services to execute this agreement on behalf of the District."

11. Select an approval tree from the **Approval Tree** menu. (Note: When you click on an approval tree, the approvers within that tree will appear in order of approval level so that you can confirm that these are the correct approvals needed for your item.)

Approval

Approval Tree

Chabot - Educational Services & Economic Development

Dale Wagoner → Susan Sperling → Estella Sanchez → Theresa Fleischer-Rowland →
Maisha Jameson → Ronald P Gerhard

12. Enter content in the **"Public Content"** editing fields. (Note: Please include the name and contact information for the person who should be contacted if there are questions re: this agenda item. This is also the area of your agenda item where all of the background information is provided, i.e. description/purpose of the agreement and major agreement terms or context for the item, etc.. Please use the "Default" option for font type and font size.)

Public Content

Rich text editor toolbar with options for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Table, Source, etc.



SUBMITTED BY -
Name:
College/Department:
Contact Info. for Submitter - or - Person to Contact with Questions:
Please list those that have reviewed and approved this agenda item outside of BoardDocs:

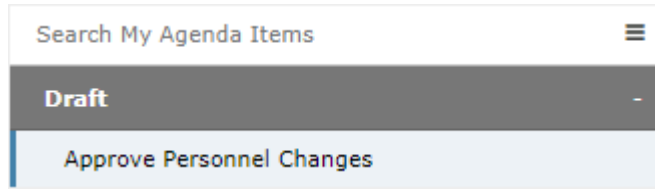
BACKGROUND INFORMATION -


13. To attach supporting documents, drag your files to the **"Public Files"** content area, or click in the field to select files to upload.

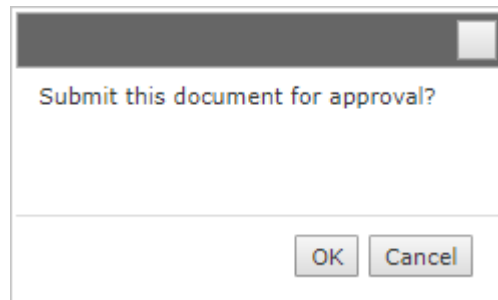
Public Files

To add files, drag or click here

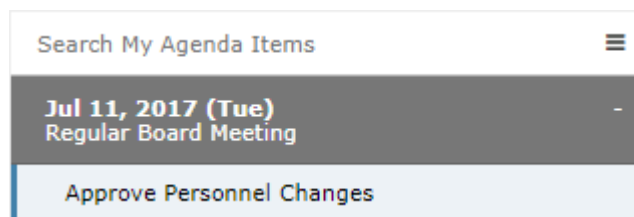
14. Click the **Submit icon**  to submit the item immediately, or click the **Save icon**  to save the item in "My Agenda Items" as a draft document.



To resume editing on a saved item, find the item within the "My Agenda Items" section (under the "MEETINGS" tab) and click the **Edit icon**  to make necessary changes. Once editing is complete, click **Submit**. Click **OK** in the confirmation window to complete the submission.



Once submitted, the meeting name appears above the item.



The submitted item appears in the Agenda panel's navigation area along with its workflow status. The status notation updates as the item moves from approver to approver.

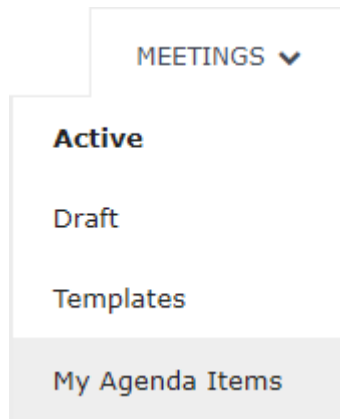
Approve Personnel Changes
In Workflow
Step: 1 of 2
Submitted by: Leigh Noble
Waiting for: Julie Devereux

Once fully approved, the status notation in the navigation area is removed. However, the item's full workflow history displays in an information area labeled "Workflow" near the bottom of the document.

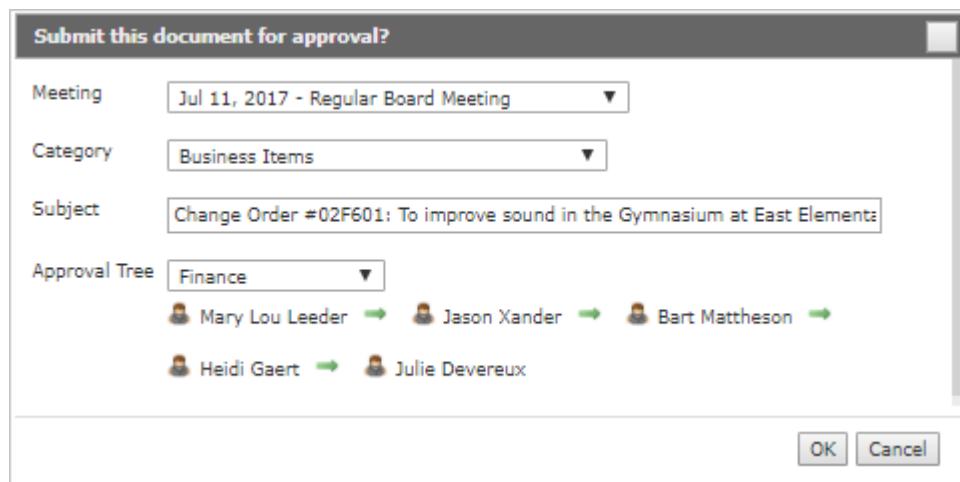
Note: After submitting an item, the submitter can edit the item and make any necessary changes up until the time the first approver approves it. However, after the first approval has occurred, the submitter can no longer make changes to the item unless an approver or publisher rejects it. Rejecting the item routes it back to the submitter for further editing.

To submit previously saved draft agenda items without editing, do the following:

1. If not already viewing the "My Agenda Items" screen, choose **My Agenda Items** from the Meetings tab menu.



2. Select the draft agenda item.
3. Click **Submit**.
4. Verify the meeting, category, and subject information in the fields and menus provided, and then select an approval tree from the menu.

A screenshot of a dialog box titled "Submit this document for approval?". The dialog contains several fields and a list of users. The "Meeting" field is set to "Jul 11, 2017 - Regular Board Meeting". The "Category" field is set to "Business Items". The "Subject" field contains the text "Change Order #02F601: To improve sound in the Gymnasium at East Elements". The "Approval Tree" field is set to "Finance". Below this, there is a list of users with green arrows pointing to the right, indicating they are in the approval chain: Mary Lou Leeder, Jason Xander, Bart Mattheson, Heidi Gaert, and Julie Devereux. At the bottom right of the dialog are "OK" and "Cancel" buttons.

5. Click **OK** to submit the item.