

# Procedures for Adding or Revising University Policies

## *Supplemental to* [University Policy 805, University Policy Development, Approval, and Publication](#)

1. All proposed new University Policies or revisions to existing University Policies may be requested by the Chancellor or the Vice Chancellor (or designee) of the unit responsible for the University Policy (“Responsible Office”). Such requests should be sent to the Office of Legal Affairs (OLA) in accordance with [University Policy 805, University Policy Development, Approval, and Publication](#).
2. When OLA receives a request to develop a new policy or for revisions to an existing policy from the Chancellor or the Responsible Office, OLA reviews the new policy draft or revision, or works with the Responsible Office to draft the new policy or revision. OLA will make recommendations as to form, format, clarity, substance, and legal implications. OLA will ensure that the Cabinet member who oversees the Responsible Office approves of the final draft before it is further processed.
3. When OLA considers the new or revised policy document to be in good legal form and it has been approved by the Responsible Office and the relevant Cabinet member, OLA emails to the Chancellor and Cabinet:
  - a. a redlined copy of the revised policy indicating proposed revisions, or a clean copy of the new policy or entirely rewritten old policy; and
  - b. an explanatory memorandum.

The email will establish a deadline for comments on the proposed document prior to discussion in an upcoming Cabinet meeting.

4. OLA will collect all comments and recommendations made by Cabinet and/or their designees, and if substantive revisions are requested, OLA will work with the Responsible Office to determine whether and how to make the revisions.
5. Once the draft is finalized, the matter will be placed on the Cabinet agenda for discussion:
  - a. Approximately three weeks from the initial distribution of the policy if there are no additional substantive revisions suggested;
  - b. At the next Cabinet meeting following resolution of issues under the process described in item 4, above; or
  - c. At the next Cabinet meeting following an inability to resolve issues under the process described in item 4, above.
6. If, after Cabinet discussion under step 5 above, the Chancellor determines that further editing/revision of the policy is necessary, OLA will:
  - a. Work with the appropriate parties to draft those revisions, and

- b. Re-submit the revised draft policy to Cabinet at its next meeting following finalization of the revised draft or present the revised draft policy to the Chancellor without Cabinet meeting if requested by the Chancellor.

The process in this step 6 will repeat until the policy revisions are approved or until the Chancellor decides not to further pursue a new or revised policy, as the case may be.

7. Once the Chancellor decides that the new or revised policy should be approved, the policy will be submitted for final approval, based on which office has final decision-making authority:

- a. If the Chancellor is authorized to approve the policy, OLA produces an approval letter for the Chancellor's signature, along with a final draft of the policy. Once the Chancellor signs the approval letter, the approval process is complete. The Chancellor will return a copy of the signed approval letter to OLA.
- b. If the Board of Trustees is authorized to approve the policy, the matter is placed on Board of Trustees agenda for the next regular meeting, schedule permitting, along with a memo describing reasons for revision or new policy, and a final draft of the policy. Once the Board of Trustees approves the policy, the approval process is complete. The liaison to the Board of Trustees will return a copy of the signed resolution or meeting minutes to OLA.
- c. If a policy that is approved by the Chancellor or the Board of Trustees requires further review and/or approval by the President of The University of North Carolina, the OLA will send the policy and explanation to the President requesting such review and/or approval.

8. Once the policy revision or new policy has final approval, OLA will:

- a. Post the new or revised policy on OLA's [University Policies website](#).
- b. Create a revision page for the policy on the "[Recent Revisions](#)" web page.
- c. Highlight the revision on the OLA home page and on the University Policies home page.
- d. Link the Revision page for the policy to the Revision History notation at the end of the policy.
- e. Submit an appropriate revision announcement to Inside UNC Charlotte (<http://inside.charlotte.edu/>) for publication.
- f. Send the approved new or revised policy to Cabinet, and request that Cabinet members distribute it within the relevant areas of their units.

9. OLA maintains a digital copy of the old (expired) version of the policy in its archives.

10. Under exceptional circumstances, the Chancellor may issue an Interim University Policy without the review process set forth above. Interim University Policies will generally remain in effect for no more than six months from the effective date of their issuance; therefore, when an Interim University Policy is issued, the Responsible Office should initiate the steps described above for review and approval of a final University Policy promptly.

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