# How to Write a UM Policy – The Quick Narrative

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<th>1. Who is the VP in charge?</th>
<th>2. Who are the subject matter experts?</th>
<th>3. Who else may be involved?</th>
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<td>The CAO/AVP will select one Vice President to be “in charge” of developing a policy. Typically, the VP-In-Charge will designate a Lead Drafter to do the work. Sometimes a policy covers more than one VP’s responsibilities. Nonetheless, only one VP takes the lead. Other VPs are involved as reviewers and commenters.</td>
<td>The Lead Drafter will prepare and circulate drafts of the policy to Legal, VPs, Directors, supervisors, Deans, administrators and others with expertise in the subject area and those whose managerial or supervisory responsibilities will be affected by the policy. The Lead Drafter will review feedback and facilitate resolution of issues that arise during development of the policy.</td>
<td>All relevant operational areas (AA, P&amp;A, A&amp;F, HR, OEA, R&amp;D, CITS), as well as Deans and school administrators, student government, faculty council, graduate council and staff senate should be considered for involvement in policy review. Consult with HR about communicating with AFSCME and with University Counsel about the need to obtain review from the Board of Regents and the Office of the Attorney General.</td>
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<th>4. Which lawyer will be working with you?</th>
<th>5. Will examples of policies from other institutions be helpful?</th>
<th>6. Is there a UMB Policy Template?</th>
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<td>If you’re not sure, please ask the CAO/AVP who will consult with University Counsel. Legal should be an integral part of the process from the beginning.</td>
<td>Upon request, the POW will look for examples from peer institutions and send the research to the Lead Drafter. The Lead Drafter is responsible for all other research. Contact the CAO/AVP to request help from the POW.</td>
<td>Yes, the template shows information that should be considered for inclusion in a policy. A copy is on the back of this sheet.</td>
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<td>A policy is ready for approval after: 1) legal has emailed approval to the Lead Drafter and VP-In-Charge, e.g., “The attached version of the policy is approved by legal,” and 2) the VP-In-Charge has emailed the approved policy to the CAO/AVP (e.g., “The attached policy has been reviewed by [specify operational areas, councils, Deans, etc.]. I approve the attached policy and believe it is ready to be signed by the President.”) <em>Only the CAO/AVP may submit policies to the President for signature.</em></td>
<td>After the President or designee approves the policy it will be returned to the CAO/AVP. The CAO/AVP will route the signature original to legal for the master file and will let the VP-In-Charge, Lead Drafter and the POW know the policy has been approved. The POW will update the policy Master List and arrange to have HR post the policy to the website.</td>
<td>The Lead Drafter (cc: VP-In-Charge) will receive an email from the POW when the policy is posted to the website so the Lead Drafter can check the policy format and content.</td>
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 TEMPLATE FOR POLICY WRITING

• Policy Title
• Proposed Policy Number
• Indexing Key Words
• Policy Abstract
• Functional Area of the VP-In-Charge
• Policy Contact - E.g., A Job Title, Not An Individual’s Name
• Policy Required By: □USM Policy Number/Title □Law/Regulation Name/Citation □Directive or Guideline Name
• Policy is: □New □Revision
• Policy Text - May Include Some or All of the Following:
  o Purpose
  o Policy Statement
  o Policy Applies To:
    □ Faculty □ Staff □ Fellows □ All UMB Personnel □ Students □Affiliates (VA, UMMS, UPI, Others), Visitors, Consultants, Others Using UMB Resources
  o Definitions
  o Policy Scope; Inclusions and Exclusions
  o Roles and Responsibilities
  o Exceptions to the Policy That May be Requested (if any); Request Process
  o Grievances Permitted About Decisions Under the Policy (if any); Grievance Process
  o Periodic Reporting Required
  o Attachments: Guidelines, Charts
  o Proposed Effective Date
  o Approved By / Date