

Procedures for Developing, Reviewing, and Revising University Policies

This set of Procedures applies to all University Policies that are published on the University Policy website at <https://universitypolicy.gmu.edu/>. All new policies, revisions to policies, and their associated Procedures should be sent to the Policy Management Group (PMG) for review and routing through the final approval process before they can be implemented.

Creating New Policy

1. Any committee, working group, task force, or individual can recommend the creation of a new policy. That individual or group should work closely with the unit(s) that will be responsible for implementing the policy to create a draft of the policy using the University Policy Template. During the drafting process, the policy drafters should also consult broadly with the Responsible Office, other units that will be involved with or impacted by the policy, and as needed with the co-chairs of the PMG, the Office of University Counsel (OUC), and Office of Institutional Compliance and Ethics (OICE).
2. When the policy proposer and Responsible Office believe the policy and associated Procedures are ready for approval, they should send the policy proposal to the Policy Manager (upm@gmu.edu) who will then assign to a co-chair of the PMG.

Revising an Existing Policy

1. A Responsible Office can submit revisions to one of their policies or associated Procedures at any time. Each approved revision restarts the timeline for policy review and revision (typically three years, unless otherwise specified in the policy or Procedures).
2. Each June, the Policy Manager will review the full policy listing to identify any policies and associated Procedures that are due for review during the upcoming academic year. The policy manager will send to each Responsible Office a list of all policies and Procedures that are due for review during the upcoming academic year along with Word copies of the current policy and associated Procedures, this Procedures document, PMG Cover Sheet, and University Policy Template.
3. Responsible Offices are responsible for reviewing each of their assigned policies and associated Procedures and responding to the policy manager to let them know whether the Responsible Office intends to renew, rescind, or revise each policy. When it is ready for review, each policy should be sent to the Policy Manager and PMG co-chairs at upm@gmu.edu. The policy should be formatted using the University Policy Template, be accompanied by a PMG Cover Sheet, and sent in an email that includes the policy number in the subject line.
 - a. Policies that are required to be reviewed pursuant to the policy's respective timetable that have been reviewed and have no suggested revisions beyond the most recent approval date and signatures will be defined as policy renewals.
 - b. Policies that are being recommended for rescission will be treated as substantial revisions and will result in review by the PMG.
 - c. Policies that are being revised will be classified as either substantial or minor revisions and will be routed accordingly. The following revisions are defined as minor revisions:

- i. Policy renewals that include no revisions beyond the most recent approval date and signatures;
 - ii. Additional or updated references to relevant law, regulations, or policy, including hyperlinks;
 - iii. Spelling, grammar, or punctuation errors;
 - iv. Revisions to the policy name or number;
 - v. Position/Title changes of personnel or offices;
 - vi. Changes in the hyperlinks, format, or design of attached forms used to implement the policy; and
 - vii. Changes to Procedures that marginally impact how the policy is implemented, but do not affect the policy substance, content, or impact on relevant parties.
4. Minor revisions and renewals of current University Policies and Procedures are sent to the PMG as notifications, and members of the PMG can request a full discussion during the meeting.

Review of Policy by the Policy Management Group

1. All policies that are being proposed for creation or revision shall be submitted to the Policy Manager at least 10 business days prior to the PMG meeting at which the policy will be reviewed. The policy manager will review each submission to ensure that it fulfills the basic requirements for submission (appropriate format, components, and inclusion of appropriate units in consultation process).
2. The co-chairs of the PMG, in consultation with the Policy Manager, will review each policy proposal or revision to determine
 - a. The type of review (new, substantial, minor, rescission, emergency),
 - b. Which co-chair will work with the policy manager to steward the final signature process, and
 - c. The list of required reviewers and approvers, which will be documented in the Signature Routing Form on the PMG Cover Sheet.
3. For each policy that they are stewarding through process, the co-chair will identify and review any related policies or laws and will provide links to those policies and laws in the policy, if not already provided by the Responsible Office and/or University Counsel. This will include a scan for any policies and laws that were not previously identified as related to the policy and adding them.
4. The Policy Manager will assemble the PMG agenda, including all policy proposals that will be discussed (new policies or substantial revisions) or notified (minor revisions) at the meeting.
5. The Policy Manager will post the agenda and attachments on the policy website and send them to all members of the PMG listserv (including all PMG members and anyone who subscribes to receive PMG notifications) at least five business days prior to the PMG meeting. The Policy Manager will also send the agenda and attachments to all individuals

responsible for proposing or revising policies on the agenda for that meeting along with an invitation to attend the meeting.

6. All PMG members are responsible for reviewing all proposals prior to the PMG meeting and noting questions, comments, and concerns on the review copy in advance of the meeting. Any member of the Mason community is welcome to send comments about any policy on the agenda to the Policy Manager at upm@gmu.edu up to three days prior to the PMG meeting, and those comments will be summarized for the PMG committee.
7. During the PMG meeting, committee members will first be given an opportunity to move a minor revision for full discussion. Any such request will result in adding that policy revision to the list of policy revisions that will be fully discussed in that same meeting. All remaining minor revisions (including renewals) will move forward in the process without further discussion.
8. Each new policy or substantially revised policy will be discussed in the order in which the materials were received by the co-chairs, unless there is a compelling reason to prioritize a specific proposal. For each proposal,
 - a. The co-chair responsible for stewarding the proposal will very briefly introduce the proposal and will introduce the proposer, who will overview the policy or revisions.
 - b. PMG members will be given an opportunity to ask questions and raise concerns about potential effects of a policy change. The proposer can respond to questions, add clarification, and make amendments to their proposal during the meeting in collaboration with the committee, if they are authorized to make such revisions. The PMG review will focus on the following activities:
 - i. Provide advisory recommendations to the Responsible Office;
 - ii. Identify unintended consequences of the policy or revised policy;
 - iii. Identify whether there are other policies, processes, trainings, or communications that might need to be updated as a result of the policy or revised policy;
 - iv. Ensure that the policy language is clear and easily understood by policy users who might have less familiarity with specialized language than the Responsible Office; and
 - v. Ensure clear communication about updates across units and Responsible Offices.
 - c. The PMG will recommend (1) to move the proposal directly forward in the approval process, with or without amendments that were developed during the discussion in collaboration with the Responsible Office, (2) to send the proposal back to the proposers with questions and feedback to consider before the approval process begins, or (3) to send the proposal back to the proposers with questions and feedback to consider with an invitation to return to PMG for additional discussion.

Approval Process Following Review by PMG

1. The Policy Manager (CCing the co-chair stewarding the process) will notify the proposer of any feedback and questions shared in the meeting, if they were not present in the meeting. Once the Responsible Office is ready to move the policy forward for approval (with or

without suggested revisions), the PMG cover page will be updated with any feedback and concerns raised.

2. The Policy Manager and PMG Co-Chairs will move policies forward in the policy approval process until all approvals and signatures have been completed. Approvers might share additional feedback and concerns and may request additional changes before deciding whether to approve the policy and/or revisions. Approvers can also request an additional review by PMG.

Posting and Notification

After a policy has gone through the final approval process, the Policy Manager will notify the proposer, publish the new policy on the policy website, and will archive the most recent version with all other previous versions of the policy when it becomes effective. Any rescinded policies will be added to a list of rescinded policies on the website and archived with all other previous versions of the policy.

The Policy Manager and PMG Co-Chairs will also work with the Responsible Office on whether further communication to the University community regarding the policy should be made and, if so, develop a communication plan.

Emergency Situations

There may occasionally be a need for a policy to be rapidly created, revised, or rescinded outside of the normal policy review and approval cycle. These occurrences should be rare and should only be done when there is a pressing need or urgent deadline for policy creation or revision due to a change in federal or state law, a requirement as part of a lawsuit settlement or court order, a directive with a deadline from the Board of Visitors, or another compelling reason. If the PMG co-chairs, in consultation with University Counsel, the President, the Provost, and the Chief Operating Officer determine that a new policy or revision warrants being treated as an emergency revision, then an expedited review process can be used. This review process will include the same review steps and approvals as would be included in any other review for substantive policy changes; however, the PMG process can be expedited in one of two ways:

1. If a PMG agenda has already gone out but PMG is scheduled to meet before the emergency deadline, then the emergency policy item can be added to the top of the agenda after the normal agenda deadline but before the meeting, and the online agenda and materials shall also be updated accordingly.
2. If the PMG will not meet before the emergency deadline, then the emergency policy item will be emailed to committee members for feedback with a short deadline for a response. The PMG co-chairs also reserve the right to call a special meeting of the PMG at any time.

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