

Take the following steps as you begin the process of developing a proposed new university-wide policy or amending an existing university-wide policy:

1. **Check to see if there are existing policies that cover your topic or that, with revisions, could cover your topic.**
 - Any overlaps with or relationships to other existing policies should be identified, explained, and clearly articulated in your new/amended policy. Cross-referencing by way of a link is strongly encouraged.
2. **Identify the university official or organization (usually the Board, a Vice President, or the University Faculty Council) that has the final approval of your policy.** If it is the Board of Trustees or the University Faculty Council, contact the Chief Policy Officer to ensure that the necessary steps and timelines are met to get on that body's agenda.
3. **Think about units or groups (e.g., faculty or students) that will or may be impacted by your policy**—or that may have existing requirements that will impact your policy--and formulate a review group from those units or groups. The review group will play a consultative role, providing feedback on both the language and substance of the policy, assisting in the identification of gaps or overlap with existing policies, and identifying possible unforeseen consequences.
The units and groups below are commonly affected by new and revised policies—and some, such as Faculty, Financial Aid and INLOCC, are sometimes inadvertently left out until very late in the process, which leads to delays in adoption and implementation.
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 - Faculty/HR
 - IUPD/INLOCC/EH&S
 - Student Affairs/RPS/Financial Aid
 - FMS/Tax/Treasurer
 - Research
4. **Think about what, if any, new tasks will be created by your policy or whether your policy will increase the volume or complexity of tasks that already being performed.** The review group contemplated above may serve this function, or a review group specific to workload analysis may be needed.
 - Who will be doing this work?
 - Does it create or increase record-keeping responsibilities?
5. **Think about when the policy needs to go into effect.**
 - Is there a state or federal law mandating an effective date?
 - Does it make sense for the policy to go into effect at the beginning of an academic, fiscal, or calendar year?
 - Is there an emergency or emergent situation that would drive the adoption of the policy on an interim basis?
6. **Identify key words (including common misspellings) that should be included in the [metadata?] to enhance the search functionality once the policy is posted on the website.**

Policy Development Worksheet

About This Policy