



# Developing and Maintaining Presidential Policies (“Policy on Policies”)

<b>Responsible Officer:</b>	SVP – Ethics, Compliance & Audit Services
<b>Responsible Office:</b>	EC – Ethics, Compliance & Audit Services
<b>Issuance Date:</b>	7/13/2023
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<b>Scope:</b>	This Policy applies to all University locations and offices reviewing, developing, and revising Presidential Policies.

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## I. POLICY SUMMARY

The President is the Chief Executive Officer of the University of California (UC) and is responsible for promulgating Presidential Policies to ensure compliance responsibilities are met, carrying out the Regents’ Bylaws and Policies (Governing Documents), and supporting the University’s mission of teaching, research, and public service.

This Policy:

- Describes the UC approval process and the rules and responsibilities for the development, revision, and rescission of Presidential Policies.

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- Describes the procedural steps required for the development and approval of new Presidential Policies, and review and approval of revision or rescission of existing Presidential Policies.
- Outlines required consultation with Required Reviewers and Stakeholders.

A Presidential Policy is a governing directive that mandates or constrains actions and:

- Applies to all UC locations unless indicated otherwise in the policy;
- Ensures compliance with applicable federal, state, and local laws and regulations; enhances UC's mission, promotes operational efficiencies, and/or reduces risk exposure;
- Endures from one Presidential administration to another and sets a course for the foreseeable future; and
- Receives approval by the President upon recommendation from the Policy Advisory Committee (PAC)

See the University Policy Office (UPO) website for information on the differences between [a policy and a procedure](#).

Presidential Policies may address all operations of the University except for those reserved to the [Board of Regents](#), to the Principal Officers of the Regents, to the [Academic Senate](#), or delegated to the Provost and Executive Vice President of Academic Affairs.

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## II. DEFINITIONS

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**Campus Policy Managers/Group:** Individuals/offices for each campus responsible for local policy management who may serve in an advisory role to the UPO. The list of campus policy contacts is available on the UPO [website](#).

**Compliance with Law Revision:** Changes to a Presidential Policy's content, mandates, or principles that are for the purposes of compliance with law, rules, or regulations.

**Compliance with Law Revision Process:** The steps required to perform a Compliance with Law Revision, including review by UC Legal – Office of the General Counsel, Office of the President (UCL-OGC), approval by the Responsible Officer, and issuance by the University Policy Office.

**Division Leader:** A direct report to the President who leads a division within the UC Office of the President and who, for certain Presidential Policies, may also be the Responsible Officer.

**Effective Date:** The date that the version of the Presidential Policy is first enforceable.

**Guideline:** Supplemental material that describe best practices or the recommended processes for implementing a policy or addressing a particular policy topic. It is not a directive that mandates or constrains actions.

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**Interim Policy:** A provisional/temporary policy issued when a Presidential Policy is needed within a period too short for the full Policy Development Process or Policy Revision Process to be completed.

**Issuance Date:** The date of the Issuance Letter for the new or revised Presidential Policy.

**Issuance Letter:** A cover letter signed by the President (for New Policy, Substantive Revision, and Rescission Processes) or UPO (for Technical and Compliance with Law Revision Processes) that officially issues a Presidential Policy to the UC Community and makes the Policy available to the public on the [Presidential Policy website](#).

**Policy Action Form:** A document used to propose a new Policy, Technical Revisions, Substantive Revisions, Compliance with Law Revisions, or Rescission of a Policy that must be presented to PAC as a required part of the Presidential Policy Approval Process. The [form](#) is available on the UPO website.

**Policy Advisory Committee (PAC):** The group responsible for reviewing all proposed Presidential Policies and recommending them for approval to the President. PAC members represent divisions of the Office of the President and include a representative from the Campus Policy Managers Group. PAC members are listed on the [Policy Governance Site](#).

**Policy Development Process:** The steps required to develop a Presidential Policy before the Presidential Policy Approval Process, including consultation with Stakeholders and Required Reviewers, and review by UCL-OGC.

**Policy Owner (PO):** The individual (by position) designated by the Responsible Officer (RO) who serves as the subject matter expert and is responsible for interpreting, and responding to questions about a Presidential Policy. The PO is typically designated on the Policy Template as the contact person.

**Policy Review:** An assessment performed by the RO to determine the need for a new Presidential Policy or to determine if an existing Presidential Policy is current, effective, and/or still necessary, which includes the appointment of a PO, completion of the Policy Action Form, and discussion with UPO on next steps.

**Policy Revision Process:** The collective term for the different processes that can result from a Policy Review of an existing Policy: Technical Revision Process, Substantive Revision Process, Compliance with Law Revision, and Rescission Process.

**President's Executive Office (PEO):** The office that supports the President to ensure that Presidential Policies align with the University's priorities and objectives.

**Presidential Policy:** See definition in Section I above.

**Presidential Policy Approval Process:** The steps required for approval of proposed new Presidential Policies and Presidential Policies undergoing Substantive Revisions or being recommended for Rescission, including preliminary review and approval by PAC, a Systemwide Comment Period, final review and approval by PAC and UCL-OGC, and

issuance by the President.

**Presidential Policy Template (Template):** The approved document that includes the standardized format and style for all Presidential Policies. The [Template](#) is available on the UPO website. Adherence to the Template is required for consistency and to ensure accessibility by users with specific information technology needs.

**Procedure:** A step-by-step description of the tasks required to implement a Presidential Policy. Procedures, as applicable, in Presidential Policies are typically high-level and include steps and implementation mandates that all locations must follow.

**Required Reviewers:** The mandatory reviewing bodies the PO must consult with for each Presidential Policy, such as Academic Senate; Academic Personnel and Programs (APP); Systemwide Human Resources (SHR); and Graduate, Undergraduate, and Equity Affairs (GUEA).

**Rescission:** The decommissioning of a Presidential Policy (either in whole or in part) that is no longer needed or where the content has been incorporated into another policy or document.

**Rescission Process:** The steps required to perform the Rescission of a Presidential Policy, including consultation with Stakeholders, Required Reviewers, and review by UCL-OGC.

**Responsible Office:** The office designated by the President responsible for oversight of the Presidential Policies that fall within its areas of responsibility.

**Responsible Officer (RO):** The senior-level executive who heads the Responsible Office.

**Stakeholder(s):** An individual or group within the UC system with subject matter expertise and/or a substantive interest in a particular Presidential Policy, or its implementation, who is consulted to provide comments on a proposed draft of that Policy.

**Substantive Revision:** Significant changes to a Presidential Policy's content, mandates, or principles that materially change the intent, directive, scope, impacts, and/or substance of the Policy.

**Substantive Revision Process:** The steps required to perform a Substantive Revision preparatory to the Presidential Policy Approval Process, including consultation with Stakeholders, Required Reviewers, and review by UCL-OGC.

**Systemwide Comment Period:** A Presidential Policy comment period that includes the entire UC Community and encompasses the calendar days in the specified duration. Typically, Systemwide Comment Periods are:

- 90 days for a new Policy, or a Policy undergoing the Substantive Revision Process.
- 30 days for a Policy undergoing the Rescission Process.

**Systemwide Notification Period:** A notification period before issuance of a Presidential

Policy that includes the entire UC Community and encompasses the calendar days in a specified duration. Typically, Systemwide Notification Periods are 30 days for an existing policy undergoing a Technical Revision or Compliance with Law Revision.

**Technical Revision:** A Presidential Policy revision that *does not materially change the intent or directive of the policy*, such as changes due to University Presidential reorganization, updating contact information, correcting links, typographical amendments, clarifying language, changes to legal code numbering, or a change of the Responsible Office. The need for Technical Revisions is determined by the PO, approved by the RO, and does not require PAC and UCL-OGC review and approval, but requires a Systemwide Notification Period.

**Technical Revision Process:** The steps required to perform a Technical Revision include approval by the RO and issuance by the UPO.

**University Policy Office (UPO):** The office designated by the President within the Office of Ethics, Compliance and Audit Services that manages the Presidential Policy website, the Presidential Policy Approval Process, and chairs PAC. The UPO coordinates the review, development, and revision of Presidential Policies and is charged with stewardship of the Presidential Policy Template and maintaining a central repository of Presidential Policies.

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### III. POLICY TEXT

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All Presidential Policies are subject to this Policy, which is designed to foster broad and timely review, approval, and dissemination of important governance and administrative information, and to make it readily accessible to internal and external audiences.

Policies developed by and applicable only to a specific UC location are not required to follow the procedures set forth below. However, consistent with the principles outlined in this Policy, the Executive Officer, or their designee, at each UC location, must establish a local policy or procedure to implement a standardized policy management process. Policies at each UC location must be compliant with any related Presidential Policy and ensure compliance with applicable federal, state, and local laws and regulations.

- A. Presidential Policies demonstrate accountability in support of the UC’s mission and are subject to the following tenets:
1. Presidential Policies must be written in [plain language](#). Plain language is clear, succinct writing designed to ensure all audiences understand the content as quickly and completely as possible. Plain language does not include field-specific language, except where necessary or where defined. When drafting a policy, the PO must make every attempt to integrate the specific topic within the entire framework of the Presidential Policy.
  2. Presidential Policies must meet accessibility standards (see [Information Technology Accessibility IMT-1300](#)).

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3. Presidential Policies must use neutral, non-binary terms, and avoid gendered references (i.e., freshman, chairman, congressman, him/her/he/she, etc.).
  4. Presidential Policies should be written in an equitable manner with consideration for undesirable impacts on under-served, marginalized individuals or groups to increase broader engagement or eliminate barriers.
  5. In general, where other UC policies or laws intersect or overlap, text must be cross-referenced rather than repeated in the Policy to ensure continued alignment;
  6. Presidential Policies must conform to the standard format by using the Presidential Policy Template ([Template](#)).
- B. Presidential Policies must conform to the following, which are discussed in further detail in Section V:
1. New Presidential Policies must be proposed through a Policy Review, developed per the Policy Development Process, and approved per the Presidential Policy Approval Process outlined in Section V, to ensure that the Policy is necessary, appropriate, and aligned with Regents' Policies and other UC policies.
  2. Presidential Policies must undergo a Policy Review every five (5) years, or more frequently as necessary, to ensure that each Policy reflects current practice, government regulations, laws, and guidelines and is aligned with other Regents' Policies and UC policies.
  3. Approved Presidential Policies are published on the [Presidential Policy website](#).
  4. Rescinded Presidential Policies must be included on the Presidential Policy website with a brief justification of the reason for rescission and a reference to where current information can be found (if applicable). Archived Rescinded Policies are available by request from the UPO at [policyoffice@ucop.edu](mailto:policyoffice@ucop.edu).
- C. The following information applies to Presidential Policies:
1. Policy statements are different from Procedures. Procedures may be included in a separate section within the Presidential Policy. Departmental or unit-specific procedures that do not require executive-level review and approval may be maintained by the department or unit. Presidential Policies typically do not include specific campus implementation steps or processes that are not applicable across the UC system.
  2. Presidential Policies assign authority for high-level actions, including exceptions if any, and specify when a location delegation of authority is required, and any restrictions on redelegations.
  3. Guidelines should be located on departmental or unit websites and referenced in corresponding Presidential Policies, as necessary. Guidelines should be updated regularly to ensure the information remains current, useful, and in alignment with Presidential Policies.

4. Guidelines and Procedures cannot contradict and cannot supplant Policy. Systemwide Policy-related Guidelines and Procedures must be submitted to UPO and PAC for notification to ensure that these do not conflict with current Presidential Policies.

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## IV. COMPLIANCE / RESPONSIBILITIES

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### A. Responsible Office/Officer (RO) is charged with:

- Identifying the need for a new policy;
- Working with the PO and/or UPO to conduct a Policy Review every five (5) years, or more frequently as necessary based on new regulatory requirements, risk assessments, strategic positions, or other relevant considerations, including alignment with other Presidential Policies;
- Designating a PO to lead the Policy through the Policy Development or Policy Revision Processes, the Presidential Policy Approval Process, and interpreting and responding to questions;
- Developing and communicating any related implementing Guidelines and developing training as required by the Policy or applicable laws;
- Reviewing and approving a Technical Revision or a Compliance with Law Revision to an existing Policy;
- Ensuring that consultation has occurred with Stakeholders and Required Reviewers; and
- Disseminating the Presidential Policy to Stakeholders following presidential issuance.

When a particular subject closely aligns with more than one functional area, more than one RO may be assigned.

### B. Policy Owner (PO) is charged with:

- Collaborating with the UPO during a Policy Review before the development of a draft Policy;
- Completing the [Policy Action Form](#), throughout the Policy Review, Policy Development or Policy Revision Processes, and submitting it to the RO/Division Leader for approval;
- Consulting with Stakeholders and incorporating their comments and suggestions as needed into the draft Policy;
- In collaboration with the UPO, consulting with Required Reviewers per The Regents Policies, Academic Senate rules, Union contracts, and this Policy;
- Working with the appropriate staff in UCL-OGC for legal advice and review;



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- Completing and submitting the draft Policy and any supporting documents per the Presidential Policy Approval Process. Providing the UPO and PAC a summary of the feedback received and its disposition in the proposed Policy;
- Distributing draft policy to Stakeholders for Systemwide Comment Period
- Keeping informed of changes in federal, state, and local laws and communicating with the RO/Division Leader on proposed Policy revisions; and
- Typically acting as the primary contact person to interpret and respond to questions about the Presidential Policy.

When a particular Presidential Policy applies to members of the UC community in more than one functional area, more than one PO may be assigned.

**C. Members of the UC Community:** Are responsible for understanding and complying with Presidential Policies that apply to them.

**D. University Policy Office (UPO)** is charged with:

- Maintaining the Presidential Policy website;
- Coordinating with RO/PO during a Policy Review;
- Determining with the PO whether to move a Policy forward to the Policy Development Process or Policy Revision Process and, for existing Policies, identifying the appropriate Policy Revision Process;
- Distributing proposed Presidential Policies through the Systemwide Comment and Notification Period;
- Overseeing the Presidential Policy Approval Process and chairing PAC;
- Coordinating with the PEO regarding policy actions; and
- Coordinating distribution of the Presidential Policies to the Members of the UC Community.

**E. Policy Advisory Committee (PAC)** is charged with:

- Preliminarily reviewing and approving a draft Policy per the Presidential Policy Approval Process and determining the appropriate timeline for the Systemwide Comment Period;
- Conducting a review of proposed Presidential Policies after the Systemwide Comment Period and determining whether to recommend the Policy move forward for UCL-OGC review; and
- For a new Policy, Substantive Revision, and Rescission Process, advancing final draft for approval.

**F. Stakeholders and Required Reviewers** are charged with:

- Consulting with the PO on the development of a draft Policy per the Policy Development Process, or Policy Revision Process; and



- Providing input, guidance, and feedback when requested on policies affecting their subject area(s).

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## **V. PROCEDURES**

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Presidential Policies must conform to these Procedures. Some policies predate the issuance of this Policy and have not yet undergone the Procedures outlined herein. As official Presidential Policies, they will be brought into compliance once the next Substantive Revision Process is complete.

### **A. Policy Review**

A Policy Review assesses the need for a new Presidential Policy or whether an existing Policy is current, effective, and/or still necessary. A Policy Review may be precipitated by external factors, such as changes to law, regulation, technology, or internal factors, such as stakeholder feedback, risk assessment, or a gap analysis.

1. RO identifies the need for a Policy Review, or UPO prompts RO to conduct a Policy Review. If the Policy Review is for an existing Policy this must occur, at a minimum, every five (5) years.
2. RO appoints a PO to consult with the UPO in developing the Policy.
3. PO and UPO complete the Policy Review section of the Policy Action Form and determine whether to move forward with the Policy Review, which groups to consult with during the process (Stakeholders, Required Reviewers, UCL-OGC), and which policy process to complete. PO must receive approval of the Policy Review from the Division Leader to ensure it aligns with the division's priorities and objectives. The UPO briefs the PEO on the Policy Review to ensure it aligns with the President's priorities and objectives.
4. PO in collaboration with UPO determine whether to move forward with the Policy Development Process or the Policy Revision Process.

For a new Policy, PO completes the Policy Development Process (See Section B below).

For an existing Policy, PO completes the appropriate Policy Revision Process (See Section C below) as identified by UPO.

### **B. Policy Development Process**

A new Presidential Policy is developed and used by ROs to support the missions of their units and often to meet regulatory and legislative requirements. Any individual or unit may identify the need for a new Policy, but at least one RO must sponsor its development and be accountable for the content of its principles, oversight, implementation, and Procedures.

1. The Policy Action Form assists the RO and PO with the development and drafting of the Policy.
2. PO develops the content of the draft Policy in consultation with Stakeholders and

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Required Reviewers.

3. Consultation with UCL-OGC may be necessary based on the Policy Review.
4. All substantial feedback must be carefully considered and adjudicated before the Policy moves forward.
5. Once RO approves the draft of the Policy, the PO completes the appropriate section of the Policy Action Form before the start of the Presidential Policy Approval Process (See Section D below).

**C. Policy Revision Process**

Following the Policy Review of an existing Policy, PO and UPO determine whether to complete the Substantive Revision Process, Technical Revision Process, Compliance with Law Revision Process, or Rescission Process. The Policy Action Form assists the PO in drafting the Policy revision or rescission.

**1. Substantive Revision Process**

- a. PO develops the content of the Policy revision in consultation with Stakeholders and Required Reviewers.
- b. All substantial feedback must be carefully considered and adjudicated before moving forward. Consultation with UCL-OGC may be necessary based on the Policy Review.
- c. Once the RO approves the draft revision, the PO completes a “track-changes” version (with changes identified) and the appropriate section of the Policy Action Form before the start of the Presidential Policy Approval Process.

**2. Technical Revision Process**

- a. PO receives approval from RO.
- b. PO sends a “track-changes” version of the updated Policy draft to UPO.

**Note:** Policies undergoing the Technical Revision Process do not need to complete the Presidential Policy Approval Process. They go to PAC for notification purposes and complete a Systemwide Notification Period. They may be approved by the RO, issued by the UPO, and moved to the Communicating and Disseminating section of the Presidential Policy Approval Process (See Section E below).

**3. Compliance with Law Revision Process**

- a. PO develops the content of the Policy revision in consultation with UCL-OGC.
- b. PO receives approval from RO.
- c. PO sends a “track-changes” version of the updated Policy draft to UPO.

**Note:** Policies undergoing the Compliance with Law Revision Process do not need to complete the Presidential Policy Approval Process. They go to PAC for notification purposes and complete a Systemwide Notification Period. They may be approved by the RO, issued by the UPO, and move to the Communicating and

Disseminating section of the Presidential Policy Approval Process (See Section E below).

#### 4. Rescission Process

- a. PO develops the content of the case for rescission (including reference to the location where current information will be found) in consultation with Stakeholders and Required Reviewers.
- b. All substantial feedback must be carefully considered and adjudicated before moving forward. Consultation with UCL-OGC may be necessary based on the Policy Review.
- c. Once the RO approves, PO completes a draft case for rescission and the appropriate section of the Policy Action Form before the start of the Presidential Policy Approval Process.

#### D. Presidential Policy Approval Process

1. UPO distributes a draft (or the case for rescission) of the Policy, Policy Action Form, and any attachments to PAC for review in advance of a PAC meeting.
  - a. If PAC approves the proposed policy action, UPO moves the draft Presidential Policy forward to the Systemwide Comment Period (See Item 2 below).
  - b. PAC may determine that additional consultation is needed or the incorrect Policy Revision Process has been applied, and require additional work on the draft Presidential Policy or case for rescission. (In these cases, PO must see Section B or C above and re-start process.)
2. PAC determines the duration of the Systemwide Comment Period. PO completes a cover letter to accompany the draft Presidential Policy, Policy revision, or case for rescission. To ensure the draft is communicated broadly for comment, PO sends the draft with a cover letter to Stakeholders and Required Reviewers. UPO sends the draft Presidential Policy to the Campus Policy Managers Group and posts the draft with a cover letter on the UPO website. (UC locations should establish an internal process for review and comment on Presidential Policies sent for Systemwide Comment.)
  - a. New Policies and Policies undergoing a Substantive Revision complete a 90-day comment period.
  - b. Policies undergoing the Rescission Process complete a 30-day comment period.

**Note:** Comment periods may change based on recommendation from PAC. The majority of the Systemwide Comment Period should occur during the Academic Year.
3. Upon Systemwide Comment Period completion, PO completes the ‘Systemwide Comment Period Feedback’ section on the Policy Action Form to summarize comments received and their disposition. PO submits the completed form to UPO following approval from the RO and Division Leader.
4. UPO distributes the draft Policy and completed Policy Action Form with the

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Systemwide Comment Period Feedback section to PAC for review in advance of a PAC meeting. PO presents the feedback received and any changes to the draft Policy, or case for rescission.

- a. If PAC approves the draft Presidential Policy, UPO moves the draft Policy forward. PAC may recommend additional draft changes to PO based on feedback received during the Systemwide Comment Period, but still approve the draft Policy.
  - b. PAC may determine that based on feedback received during the Systemwide Comment Period, PO must conduct additional consultation with Stakeholders and Required Reviewers, require additional work on the draft Policy, or case for rescission (In these cases, PO must see Section B or C above and re-start the process.)
5. If approved by PAC, PO finalizes any changes to the draft Presidential Policy, or case for rescission, and provides the final version to UPO to send the proposed Policy, or case for rescission, to UCL-OGC for final legal review.

**Note:** UCL-OGC may recommend edits to the draft Presidential Policy before it moves forward. PO revises the draft Policy.

6. After completion of the legal review, UPO submits the final draft Presidential Policy, or case for rescission to the Executive Presidential Advisory Group (EPAG) for final review.
7. Following EPAG review, UPO prepares and submits the Presidential Policy and Issuance Letter for the President's final review and approval.
8. The President issues the Presidential Policy by signing the Issuance Letter.

**E. Communicating and Disseminating the Presidential Policy**

1. A new Presidential Policy and all Revision Processes require an Issuance Letter.
  - a. New Policies, Substantive Revisions, and Rescissions must be issued by the President.
  - b. Technical Revisions and Compliance with Law Revisions are approved by RO and issued by UPO.
2. The Issuance Letter and Presidential Policy, or case for rescission, are disseminated by UPO, on behalf of the President, to the Chancellors, Lawrence Berkeley National Laboratory Director, Vice President-ANR, Systemwide Division Leaders, Systemwide Academic Senate Chair, Campus Policy Managers, the PO and all named parties in the Issuance Letter.
3. RO distributes the Presidential Policy to the Stakeholders and Required Reviewers.
4. The UPO publishes the Presidential Policy or the case for rescission on the Presidential Policy website.
5. RO and PO deliver any additional communication or training.

## F. Interim Policies

The President may approve a Presidential Policy as an Interim Policy in special circumstances, that are approved on a case-by-case basis.

1. RO and PO complete the necessary steps of the Policy Review (See Section A above).
2. During the outset of a Policy Review, if it is determined that the draft Presidential Policy needs to be updated as an Interim Policy, the PO completes the Policy Action Form and consults with the UPO to determine the steps to complete the Policy Development or Policy Revision Process.
3. If a draft Policy is already in the Policy Development Process or Policy Revision Process and it is determined that the draft Policy needs to be updated as an Interim Policy, the draft Policy will move to the Presidential Policy Approval Process. RO must continue to finalize the Policy Development Process or Policy Revision Process.

**Note:** At a minimum, the PO must consult with Required Reviewers (even if in an expedited manner) and must receive approval from PAC, review by the UCL-OGC, and EPAG review before Presidential approval.

4. An Interim Policy must be approved through the Presidential Policy Approval Process but may need to delay steps such as the Systemwide Comment Period. Interim Policies are approved for 12 months, with possible supplemental approval in 12-month intervals. An Interim Policy must complete the Policy Development Process or Policy Revision Process (See Section B or C above), preferably within two (2) years of the issuance of the Interim Policy.
5. Interim Policies are marked as “**INTERIM POLICY**”.
6. Once the Interim Policy is approved, the process moves ahead to Communicating and Disseminating the (Interim) Presidential Policy (See Section E above).
7. The target date for completing the Presidential Policy Approval Process is published at the time the Interim Policy is approved.

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## VI. RELATED INFORMATION

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[Academic Review of Presidential Policy](#)

[Article IX, Section 9 of the California Constitution](#)

[Bylaws of The Regents](#)

[SHR Policy Creation and Review Process](#)

[Policy Manuals & Guidelines](#)

[Policy Development Resources](#)

[Regents Policy 1000: Policy on Policies of the Regents of the University Of California](#)

## VII. FREQUENTLY ASKED QUESTIONS

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Frequently Ask Questions

How to Contact the [Universitywide Policy Office](#) ([policyoffice@ucop.edu](mailto:policyoffice@ucop.edu))]

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## VIII. REVISION HISTORY

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**July 13, 2023:** The policy underwent substantial revisions to standardize and clarify the approval process, requirements, and responsibilities for the development, revision, and rescission of Presidential Policies to promote compliance and efficiency.

Revisions include:

- updating the Policy title, scope, and summary to accurately reflect content;
- adding and updating definitions for terms frequently used and removal of terms that are not used;
- adding requirements such as:
  - use of gender-neutral terms;
  - cross-referencing of UC policies and laws for continued compliance and ease of maintenance;
  - New Presidential Policies must be proposed through a Policy Review, developed per the Policy Development Process, and approved per the Presidential Policy Approval Process;
  - all Presidential Policies must undergo a Policy Review every 5 years, or more frequently as necessary;
  - a Compliance with Law Revision Process to handle changes to a policy that is for the purposes of law, rules, or regulations
  - rescinded Policies on the website must also include a reference where current information can be found (if applicable);
  - policies must specify when a campus location delegation of authority is required, redelegatable, and any restrictions on redelegations;
  - Guidelines and Procedures cannot contradict or supplant Policy, and systemwide Policy-related Guidelines and Procedures must be submitted to UPO and PAC for notification to ensure they do not conflict with Presidential Policies;
- adding responsibilities for the Policy Action Committee, Division Leader, Stakeholders, and Required Reviewers;

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- revising procedures to describe the action steps for accomplishing required tasks that have to be completed; and
- editorial changes for readability and clarity.

**August 3, 2021:** The policy underwent technical revisions in order for Section II Definitions and Section V Procedures to read more clearly. Revisions include: updating embedded links; re-locating policy text for readability and clarity; and using defined terms consistently.

**August 10, 2018:** Initial issuance of this Policy. The Policy was also remediated to meet Web Content Accessibility Guidelines (WCAG) 2.0.