

Next Steps for CBOs

Preparing for Policy 1.2 Implementation and January 1, 2027 Delegation Transition

September - October 2026

- ✓ Review current signature authority assignments within your school/unit.
- ✓ Identify positions that require delegated or sub-delegated authority.
- ✓ Nominate 1-2 representatives for the Emory Policy Champion Network (EPCN).

October - November 2026

- ✓ Complete delegation and sub-delegation letters using the Authorized Delegated Signature Authority Matrix.
- ✓ Obtain required approvals and signatures.
- ✓ Submit completed delegation letters to Finance@emory.edu.

November - December 2026

- ✓ Respond to any Finance Division validation or correction requests.
- ✓ Ensure delegates complete required Signature Authority training.
- ✓ Share policy resources and key changes with departmental leaders and staff.

January 1, 2027

- ✓ New delegation letters become effective.
- ✓ Prior delegation and sub-delegation letters expire.
- ✓ Use the Authorized Delegated Signature Authority Matrix to verify signing authority before executing agreements.

Ongoing

- ✓ Update delegation records when roles or authority levels change.
- ✓ Complete annual delegation attestation when requested by Finance.
- ✓ Engage with the Emory Policy Champion Network to share feedback and implementation challenges.

CBO Success Measures

- All required delegation letters submitted and approved.
- Delegates trained prior to exercising authority.
- No unauthorized signatures or expired delegations.
- Annual attestations completed on time.