Helpful Guide to Developing and Modifying Policies and Procedures

A Policy (P) explains the reason for the regulation, a Procedure (R) explains implementation of corresponding policy.

CWU policies and procedures guide the application of state law and policies adopted by university divisions and the Board of Trustees.

Before you begin this process, talk to your unit leader and make sure you have support for the policy change you have in mind.

Policies and Procedures (P/R) process.

(1) Contact the President’s Office for the official document.

(A) To modify an existing policy or procedure (P/R), request an official copy of the policy(s) and/or procedure(s) you would like to revise. Do not copy from webpage.

(B) To create a new policy or procedure, request a number for the new policy(s) and/or procedure(s).

(C) The President’s Office will send a cover page template,

1. Where you will denote whether you are developing a new P/R, or modifying an existing P/R.

2. Provide a brief summary of why the P/R is being revised and cite the changes therein.

3. Include the completed cover page with the body of the policy and/or procedure as one document, not separately.

(2) Writing and revising policies and procedures.

(A) Make revisions to the provided Word document with the “track changes” feature turned on. This step is critical.

1. It is important to use and save the tracked changes every time anyone makes any revisions. The later review process requires knowledge of all participants who made what changes at what time.

(B) Writing style

1. Use common language, present tense, active voice.

a. Keep it simple, straight forward and easy for the reader to understand.

b. Avoid using "shall" and "shall not" if possible. Describe correct action(s) to be taken.

c. No need to refer to "CWU" within the text, it is implied.

(C) Formatting

1. Use Calibri 10 pt. font.

2. Only capitalize formal names and titles if referring to a specific person.

3. Hyper link referenced RCWs, WACs, CWUPs, CWURs or other official documents. If you do not have a link for the official document, do not reference it.
4. Left justify everything.

5. Do not use indents, italics, bolding, underline, or bullet points.

6. Subsections and subparagraphs are enumerated as follows:
   (1) \textit{Space between each section to allow easier reading.}
   (2)
   (A)
   (B)
   1.
   2.
   3.
   a.
   b.

8. Footer: Include the numbered section and numbered sub-section of the P/R in the bottom left of the footer.
   a. See example at the bottom left of this page.

9. Page numbers to be added on the bottom right of the page
   a. See example at the bottom right of this page.
   b. Page number format: Page 1 of 4, Page 2 of 4, etc.

(D) Signature line. Add the following signature line with the proper information at the end of the policy text as well as the end of the procedure text. Keep all previous revision dates in signature, add the UPAC date where the

1. [Responsibility: Operations Division; Authority: Cabinet/UPAC; Reviewed/Endorsed by: Cabinet/UPAC; Review/Effective Date: (all previous review dates) XX/XX/20XX; Approved by: James L. Gaudino, President]

(3) Submit your revisions through your divisional lines:

(A) President’s Division goes from department to the Chief of Staff.

(B) Academic & Student Life goes from the department, to college, then to VP of Academic & Student Life/Provost (P/Rs may also be brought before Provost’s Council prior to presentation to the president).

(C) Business and Financial Affairs Division goes from department to the VP of BFA /Chief Financial Officer.

(D) Operations Division goes from department to the VP of Operations.

(E) Enrollment and Admission Division goes from the department to the VP of Enrollment.

(F) If any policies or procedures have budgetary implications, it will need to go before the Budget and Finance Committee prior to step 4.
(G) If any policies or procedures have academic implications, it will need to go before the Provost Council prior to step 4.

(4) The VP or Chief of Staff will review the proposed changes or new policy with the President prior to full review by the President’s Cabinet.

(5) If recommended by the Cabinet, the revisions or new policy/procedure will be submitted to UPAC – which meets quarterly, approximately one month into the quarter.

(6) If recommended by UPAC, the President can approve the new/revised policy or procedure, which then becomes an official document (except in those cases which must go to the Board of Trustees. See CWUP 1-10-050, Powers and Duties).
Policy & Procedure Review

Date Submitted: August X, 20XX
Department: Xxxxx Xxxxx
Division: Operations Division

Policy & Procedure Number & Name:
CWUP 2-50-100  Use of Closed Circuit Television and Cameras
CWUR 3-40-960  Closed Circuit Television and Cameras

New Revision Last Revision XX/XX/XXXX

Title: Closed Circuit Television and Cameras

Summary of Impact: (Explain why this policy or procedure has been created/changed.)
The XXXXX policy (CWUP X-xx-xxx) was reviewed and revised to reflect staffing changes and updates. Language was added to the policy to reflect this change and the text was edited to enhance readability.

The following staff members contributed to this effort:
(Add names/titles of staff who created, edited, formatted or reviewed the document)
First Last, Title
First Last, Title

(Insert Page Number (bottom right) and Footer that denotes the section and sub-section of the P/R in the bottom left of the footer. Footer example below).
CWUP X-XX-XXX Policy Title

(Describe the purpose and scope of the policy, who is responsible for it and how it will be maintained. Use common language, present tense, active voice. Keep it simple, straightforward and easy for the reader to understand.)

Add the following sentence at the end of the policy description.

The department manager/director or other designee through the vice president of operations is responsible for this policy and relevant procedure, CWUR X-XX-XXX.

Include signature line.

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CWUR X-XX-XXX Procedure Title

Simple introduction.

(1)

(A)

1.

a.

2

(B)

(2)

(A)

(B)

1.

2.

3.

a.

b.

Insert signature line.

[Responsibility: Operations Division; Authority: Cabinet/UPAC; Reviewed/Endorsed by: Cabinet/UPAC; Review/Effective Date: XX/XX/20XX; Approved by: James L. Gaudino, President]