

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. The P/R numbers often correspond with one another.

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 to ensure 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.

1. The President's Office will send a cover page template,

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

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

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

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

(2) Writing and revising policies and procedures.

(A) Track Changes

1. Make edits and revisions to the Word document with the "track changes" feature turned on. This step is critical.

2. It is important to use and save the tracked changes every time revisions are made. The review process requires knowledge of all participants who made changes.

(B) Writing style

1. Use common language, present tense, active voice. Do not include proper names, emails, or locations, due to frequent changes (e.g. "go to the President's Office" instead of "go to the President's Office, Barge 304").

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. Hyperlink 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 all left justified:

(1)

Space between each section to allow easier reading.

(A)

(B)

1.

2.

a.

b.

7. 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 right of this page.

8. Page numbers to be added on the bottom right of the 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 P/R text. Keep all previous revision dates in signature.

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

(C) Business and Financial Affairs Division goes from department to associate VP of BFA, then to the VP of BFA /CFO.

(D) Operations division goes from department to the VP of Operations/COO.

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

(F) If any policies or procedures have budgetary implications, it will need to go before the President's Budget Advisory Committee (PBAC) prior to step 4.

(G) If any policies or procedures have academic and/or student life implications, it will need to go before the Provost's 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 cases which must go to the Board of Trustees. See [CWUP 1-10-050 Powers and Duties](#)).

University Policy Advisory Committee Policy & Procedure Review

| | |
|-----------------------------------|--|
| Title: | |
| | |
| Date Submitted: | |
| | |
| Submitted by (Individual): | |
| | |
| Department: | |
| | |
| Division: | |
| | |
| Policy Number: | |
| | |
| Procedure Number: | |

- New Revision

 The policy or procedure has been formatted to be consistent with CWUP standards.

 The policy and/or procedure change has a budget impact. Yes No
(If yes, please attach a spread sheet that provides an analysis of the impact.)

| Consultation and Review | | | |
|--|-------------------------|------|---------------------------|
| Please indicate consultation completed in the preparation of your proposed policy or procedure, including the name of the individual or groups consulted, the date of the consultation, and any written feedback/recommendations from the group consulted. | | | |
| Date | No Budget Impact | Date | Budget Impact |
| | Issue-area stakeholders | | Issue-area stakeholders |
| | Provost's Council | | Affected budget authority |
| | Cabinet | | PBAC |
| | UPAC | | Provost's Council |
| | | | Cabinet |
| | | | UPAC |

Summary of impact: Briefly explain why this policy or procedure has been created/changed.

Summary of policy/procedure: brief narrative

Itemization of changes (revision documents): brief narrative

(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, straight forward 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. Include all previous approval dates.

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

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]