

**University Policy Advisory Committee Policy & Procedure Review**

<b>Title:</b>	CWUR Policy Procedure (working title)
<b>Date Submitted:</b>	
<b>Submitted by (Individual):</b>	
<b>Department:</b>	President’s Office
<b>Division:</b>	President
<b>Policy Number:</b>	
<b>Procedure Number:</b>	

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.)*

<b>Consultation and Review</b>			
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
12/7/22	Issue-area stakeholders		Issue-area stakeholders
	Provost’s Council		Affected budget authority
	Executive Leadership Team		PBAC
	UPAC		Provost’s Council
	Shared Governance Committee		Executive Leadership Team
			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

**Policy impact on equity:**

**1. What does this policy aim to do?**

A. Who benefits from this policy?

B. Who is left out of this policy?

**2. What are the basic assumptions of this policy?**

A. How do these assumptions impact equity?

For clarification and consultation, contact Sigrid Davison, Associate Director of Diversity and Inclusivity at [sigrid.davison@cwu.edu](mailto:sigrid.davison@cwu.edu).

## Helpful Guide to Procedure ~~to for~~ **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, but not always, 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.

~~To Before you~~ begin this process, ~~talk to~~contact your~~the relevant~~ unit leader ~~and~~ to ensure ~~you have~~ support for the ~~policy P/R~~ changes ~~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 d~~Denote whether you are developing a new P/R, or modifying an existing P/R.

b. Provide a brief, itemized -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)~~If developing a new policy or procedure, president's office staff will work with the appropriate division for placement within the P/R Manual. The number is generally assigned to the P/R upon approval by UPAC.

(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 T~~tracked changes must be utilized 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 3104").

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.~~

1. Do not use auto-format.

2. Use Calibri 10 pt. font.

3. One space after periods.

~~42.~~ Only capitalize formal names and titles if referring to a specific person.

~~53.~~ 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.

~~64.~~ Left justify everything.

~~75.~~ Do not use indentations, italics, boldfaceing, underline, or bullet points.

~~86.~~ 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.

~~97.~~ Footer: Include the numbered section and numbered sub-section of the P/R in the bottom left of the footer.

~~a-~~ Footer format (example numbers only): See example at the bottom right of this page.

CWUP 1-0 Board of Trustees

CWUP 1-70 Bylaws of the Board of Trustees

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. Signature line format:

[Responsibility: ~~Operations~~ [name of division] Division; Authority: ~~Cabinet~~ Executive Leadership Team/UPAC; Reviewed/Endorsed by: ~~Cabinet~~ Executive Leadership Team/UPAC; Review/Effective Date: (all previous review dates) XX/XX/20XX; Approved by: A. James Wohlpart, James L. Gaudino, President]

2. Definitions:

a. Responsibility is the division responsible for the implementation and maintenance of policy or procedure.

b. Authority commonly rests under the Executive Leadership Team and University Policy Advisory Committee.

3. Incorrectly formatted documents will be returned to divisional staff, possibly resulting in significant approval delays.

(E3) Submit ~~draft~~ your revisions through your divisional lines:

(A) President's Division ~~moves~~ goes from department to the ~~c~~ Chief of ~~S~~ staff.

(B) ~~Academic & Student Life Affairs~~ ~~goes~~ ~~moves~~ from the department, to college, then to ~~VP of Academic~~ ~~the VPvp~~ of ~~Aacademic Aaffairs/Pprovost & Student Life/Provost~~

(C) ~~Finance and Administration Business and Financial Affairs~~ Division ~~goes~~ ~~moves~~ from department to ~~associate VP~~ of ~~BFA~~, then to the ~~VP~~ ~~senior vp of finance and administration of BFA~~ /CFO.

(D) ~~Operations division~~ ~~Student Engagement and Success Division~~ ~~moves~~ ~~goes~~ from department to the ~~vp~~ ~~VP~~ of ~~Operations/COOs~~ ~~Student eEngagement and Ssuccess~~.

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

(4) ~~Stakeholder approval process~~.

(A) If ~~any~~ ~~policy~~ ~~ies~~ or procedures ~~have~~ ~~s~~ budgetary implications, it will need ~~to go~~ ~~to be presented~~ before the President's Budget Advisory Committee (PBAC) prior to step 4. ~~A committee designee will make recommendations to th~~ ~~for consideration by the president~~.

(B) If ~~any~~ ~~policy~~ ~~ies~~ or procedures ~~have~~ ~~s~~ academic and/or student life implications, it will need ~~be presented~~ ~~to go~~ before the Provost's Council prior to step 4. ~~A committee designee will make recommendations to the president~~.

(C) Upon review of and any further updates to the proposed changes at the divisional level as outlined in Section (3), the ~~c~~ ~~Chief~~ of ~~s~~ ~~Staff~~ or their designee will publish the proposed draft policy change on the UPAC website for comment by the general CWU community for a minimum of two weeks (14 calendar days).

(D) The ~~VP~~ ~~vp~~ or ~~c~~ ~~Chief~~ of ~~S~~ ~~Staff~~ will ~~compile all feedback from the campus comment process and consider whether further changes to the proposed policy will be made~~.

(E) If proposed changes from the campus comment process affect the university budget, academic or student life, and/or the operations of a CWU division, the ~~VP~~ ~~vp~~ or ~~C~~ ~~Chief~~ of ~~S~~ ~~Staff~~ must resubmit the proposed policy in accordance with section (3) of this policy.

(F) The ~~vp~~ ~~VP~~ or ~~C~~ ~~Chief~~ of ~~S~~ ~~Staff~~ will review the proposed changes or new policy with the ~~P~~ ~~President~~ prior to full review by the ~~P~~ ~~President's~~ Executive Leadership Team.

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

(H) If recommended by UPAC, the ~~p~~ ~~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).

*[Responsibility: President's Division; Authority: Executive Leadership Team/UPAC; Reviewed/Endorsed by: Executive Leadership Team/UPAC; Review/Effective Date: XX/XX/20XX; Approved by: A. James Wohlpart, President]*