UNIVERSITY OF WISCONSIN SYSTEM

UW System Administrative Polices: Glossary and Style Book

FORMATTING AND WRITING GUIDE FOR POLICIES, PROCEDURES, AND GUIDELINES

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UW UNIVERSITY OF WISCONSIN SYSTEM

Glossary of Terms Used in Policy Development

Policy Summary: A document that describes the purpose of the policy, the revisions, how institution comments were incorporated, and the impact of the policy.

Policy Template: A document that describes the rules, regulations, and expectations that stakeholders are expected to follow.

Procedure Template: A document that describes the necessary steps that need to be in place to be compliant with the policy.

Guideline Template: A document that provides additional information in order to help institutions comply with the policy.

Finance and General Administration Policy Committee (FGAPC): The FGAPC provides internal review of changes to financial and administrative policies. The committee is comprised of several members as described in [UW System Administrative Policy 3, *Development, Revision, and Approval of Finance and General Administration Policies and Procedures.*](#) The Committee meets on a monthly basis.

Academic and Student Affairs Policy Committee (ASAPC): The ASAPC provides internal review of changes to academic and student affairs policies. The committee is comprised of several members as described in [UW System Administrative Policy 2, *Development, Revision, and Approval of Academic and Student Affairs Policies*](#). The Committee meets on a monthly basis.

Responsible UWSA Officer: The Responsible UWSA Officer varies depending on the policy but is typically a Vice President, Associate Vice President, or Director in the policy subject, or their designee. The Responsible UWSA Officer owns the content and direction of the policy.

Substantive Revisions: Amendments to policies, procedures, or guidelines that change the meaning or intention of the document. Substantive revisions go to institutions for review.

Technical Revisions: Amendments to policies, procedures, or guidelines that do not provide substantial change to the content or meaning of the document. Examples of technical amendments include, but are not limited to, updates to formatting, updates to contact information, changes in office names, cross-references to additional information, and rate changes. Technical revisions do not need to go to institutions for review.

UW System Administrative Policy, Procedures, and Guidelines (SYS): Policies, procedures, and guidelines that affect the entire UW System, except for the 1200 series. The 1200 series policies were a part of the former UPS Policy set and apply to all University of Wisconsin institutions except for UW-Madison.

UW System Administration Policies, Procedures, and Guidelines (UWSA): Policies, procedures, and guidelines that affect UW System Administration internally.

Equity Lens: A framework for policy writers and reviewers to evaluate the impact of policies on underrepresented communities and identities, including but not limited to: ethnicity, race, religious expression, people with apparent and non-apparent disabilities, people of various gender and sexual identities and expressions, age, socio-economic status, veteran status, American Indians, and other indigenous populations.

Writing Policies, Procedures & Guidance

Policy Development

The UW System Office of Administration manages the administrative policy process. It provides policy owners and stakeholders feedback on drafts of new or revised Finance and General Administrative policies. Once a draft is completed, UWSA collects policy feedback from relevant committees and institutions and helps policy owners address comments. UWSA maintains up-to-date versions (including Word versions) of Finance and General Administrative policies and Academic and Student Affairs policies.

Please follow the rules below when drafting or revising a policy:

1. Use the standard templates developed and explained in SYS 1, *Development, Revision, and Approval of UW System Administrative Policies, Procedures, & Guidelines*.
   a. Do not delete template sections
      i. If they do not apply, state that in the policy.
2. Link all referenced websites and documents.
3. Wisconsin state statutes should be referenced in the following format:
   a. Wis. Stat. s. XXX.X(X), *Statute Title.*
4. SYS policies should be referenced in the following format:
   a. SYS XX, *Policy Title.*
5. SYS procedures should be referenced in the following format:
   a. SYS XX, *Procedure Title.*
6. Regent Policy Documents should be referenced in the following format:
   a. RPD XX-X, *Document Title.*
7. Gender pronouns should not be used.
8. Only use acronyms if they are spelled out earlier in the policy. Always indicate acronyms at the first occurrence of the phrase or sentence within the document.
9. Capitalize all official titles.
10. Only use position titles when delineating responsibility.
   a. Avoid listing specific people by name.

Bold a word when placing emphasis.

Plain Language

SYS policies, procedures, and guidelines impact many stakeholders and should be specific and easy to understand. Please follow the guidance below:

- Define all uncommon terms in the "Definitions" section of the policy.
  - When defining a policy term, check similar policies to see if a definition exists elsewhere to try and ensure consistency where appropriate.
  - Only define a policy term if the term is used within the document.
- Use the "active voice" to clearly state the individual or department who needs to perform the action listed in the policy.
- Use bulleted lists or tables to display a series of requirements or examples.
- Simplify vocabulary and use concise language.
- Break up long sentences into short, easy-to-understand sentences
- Be precise when using directives. Use:

- o "must" for mandatory activities;
  - "UW System Institutions must develop procedures to support this policy."
- o "may" for optional actions; or
  - "Exceptions may be granted by the UW System President under specific circumstances."
- o "should" for recommendations.
  - "Employees should receive training on these provisions annually."

For more information and guidance, please visit the resources below:

- Plain Language.gov, Improving Communication from the Federal Government to the Public
- University of Wisconsin-Madison Writer's Handbook
- Purdue Online Writing Lab

Equity Lens Framework

Please consider the following to ensure compliance with the equity lens and eliminate disparate impacts on underrepresented audiences:

- Consider if the policy has disproportionate effects based on the following:
  - o Ethnicity;
  - o Race;
  - o Religious expression;
  - o People with apparent and non-apparent disabilities;
  - o People of various gender and sexual identities and expressions;
  - o Age;
  - o Socio-economic status;
  - o Veteran status; and
  - o American Indians and other indigenous populations.
- What individuals and groups are stakeholders of this policy? Does this policy treat all impacted stakeholder groups equally and proportionately?
- Does this policy represent the values of diversity and inclusion of the UW System? For more information, please visit: https://www.wisconsin.edu/inclusive-excellence/. Does this policy create any barriers for underrepresented audiences or stakeholders?

Effective Date Practices

Most new or revised SYS policies become effective at the time of approval. However, some SYS policies require a greater investment of resources or training for UW institutions become compliant. For these policies, the policy owner may decide to publish a delayed effective date.

When there is a delayed effective date, the proposed effective date must fall on the first of a given month, be communicated at the time of the policy distribution, and be listed at the top of the policy. The Office of Administrative Policies will include a notice about an upcoming effective date a month in advance. Reminders can be distributed earlier as well, at the request of the policy owner.

The responsibility of monitoring policy implementation and providing any necessary training about a policy falls to the policy owner.

SYS Policy, Procedure, and Guidance Templates

UW System Office of Administration maintains standardized templates for all SYS policies, procedures, and guidelines to improve understanding across the system. These templates contain instructions under each heading to inform policy owners of what should be included. The most recent version of the templates can be found on the [Administrative Policy Resources](#) page. A brief summary of the definition of each document type (and when to use) is below:

Policy

The UW System Administrative policy set falls into two general areas:

1. Academic and Student Affairs Policies
2. Finance and General Administration Policies

In both categories, policies are developed to establish standards to comply with applicable laws, regulations, and Regent Policy Documents. Policies apply universally to all UW institutions, except policies in the 1200 series which apply to all institutions except UW-Madison, and are designed to promote efficiency, reduce risk, and/or enhance operational objectives of the UW System. SYS Policies are reviewed and approved by the System President.

Procedure

Procedure documents list action steps required to implement and comply with SYS Policies. They may include specific instructions and forms to assist in complying with the policy they support. SYS Procedures are reviewed and approved by the responsible System Vice President or the Executive Director of UW Shared Services.

Guidance

Guidance documents support policies by providing best practices or advice on interpreting or complying with a policy. SYS Guidelines are reviewed and approved by the responsible Associate Vice President or Director.