This message is being sent to Provosts, CBOs, SSAOs, CDOs, Shared Governance Groups, CHROs, and Identified Campus Representatives. Please share with any colleagues who would have an interest in reviewing.

SEPTEMBER POLICY ACTION SUMMARY

Attached please find a summary of all Board of Regents and UW System Administrative policy work completed from September 14, 2020 to October 12, 2020. Policy work included:

- Three (3) New Regent Policy Document Approvals
- Four (4) Regent Policy Document Revisions
- Three (3) Regent Policy Document Rescissions
- One (1) New Interim UW System Administrative Policy Action
- Three (3) Interim UW System Administrative Policy Action Revisions
- Two (2) UW System Administrative Policy Revisions
- One (1) UW System Administrative Guidance Revision

INSTITUTION POLICY DISTRIBUTION REMINDER

Policies for the September Distribution
As a reminder, there are eight (8) policy revisions and two (2) policy rescissions included in the September Institution Distribution. The included Operational, Human Resources, and University Personnel System policies have a 30-day comment period. They are listed below:

- **SYS 1, Development, Revision, and Approval of UW System Administrative Policies, Procedures, & Guidelines**
- **RESCISSON- SYS 235, Personal Services Payments**
- **SYS 236, Utilization of Independent Contractors**
- **SYS 237, Utilization of Borrowed Employees/Employee Interchange Agreements**
- **SYS 238, Payments to Foreign Nationals**
- **RESCISSION- SYS 1236, Temporary Interchange**

The included policies from the Academic and Student Affairs policy series have a 60-day comment period. They are listed below:

- **SYS 102, Policy on University of Wisconsin System Array Management: Program Planning, Delivery, Review, and Reporting**
- **SYS 145, Development and Operation of Off-Campus International and Study Away Education Programs for University of Wisconsin System Students**
- **SYS 146, University of Wisconsin System Faculty and Academic Staff for Study Abroad and Study Away**
- **SYS 160, Faculty Sabbatical Program**

To view the full policy summaries and draft policies and to comment on the policies, please click on the links above. **Please submit your comments (which may include attachments such as word documents, PDFs, etc.) through the link above.** Doing so ensures your feedback is captured and reviewed during the post-comment period.

The deadline to review and submit feedback for the policies below via the comment form is **Monday, October 26.**

**SYS 1, Development, Revision, and Approval of UW System Administrative Policies, Procedures, & Guidelines**

*This policy will be effective upon approval.*

Summary of Policy and Policy Revisions

- The revisions to SYS 1, Development, Revision, and Approval of UW System Administrative Policies, Procedures, & Guidelines would implement a formal interim policy and procedure framework for the UW System Administrative (SYS) policy series.
- Reference will be added to a new accompanying procedure, SYS 1.D, **UW System Interim Policy/Procedure Action Template**, which will be used for all interim SYS policy/procedure actions

**RESCISSION- SYS 235, Personal Services Payments**

Background Summary of Policy
The University of Wisconsin System secures the personal services of individuals and business entities through one of two methods: an employer/employee relationship or an agreement with an independent contractor. The purposes of this paper [sic] are to provide the criteria which should be used in selecting between the methods of securing the services and to describe the corresponding procedures for compensation of such services. Neither payrolled scholarships and fellowships nor subcontracts of extramurally supported projects are addressed in this paper.

Rationale for Rescission

- **SYS 235** contained a mishmash of policy topics covering at least 3 distinct subject areas: the utilization of independent contractors; the utilization of employees borrowed from other institutions and governmental units; and the employment/compensation of foreign nationals.
- In the interest of clarity and transparency, the three subject areas have been split into three new policies: **SYS 236, Utilization of Independent Contractors**, **SYS 237, Utilization of Borrowed Employees**, and **SYS 238, Payments to Foreign Nationals**. As part of this reorganization, policies **SYS 235** and **SYS 1236** are being rescinded due to redundancy. Some technical elements of **SYS 235** are also being relocated into SYS 540 in the procurement series.
- This reorganization creates no new compliance obligations and does not eliminate any existing compliance obligations.

**SYS 236, Utilization of Independent Contractors**

*This policy will be effective upon approval.*

Summary of Policy and Policy Revisions

- SYS 236 is one of three new policies replacing **SYS 235, Personal Services Payments**. This policy identifies the circumstances under which independent contractors may be used, the criteria for their selection and the mechanisms by which they may be compensated.
- The elements of SYS 235 and its related attachments which covered independent contractors have been separated and captured in this policy.
- Existing procurement rules and processes related to independent contractor services have been collected and aggregated into this policy.

**SYS 237, Utilization of Borrowed Employees/Employee Interchange Agreements**

*This policy will be effective upon approval.*

Summary of Policy and Policy Revisions

- SYS 237 is one of three new policies replacing **SYS 235, Personal Services Payments**. This policy additionally replaces **SYS 1236, Temporary Interchange**, bringing all HR requirements related to Employee Interchange Agreements into a single policy. This policy identifies the provisions under which UW System Institutions may lend or borrow employees to or from other UW System Institutions, Wisconsin State agencies, the Federal Government, local governmental entities and foreign governments.
- The elements of SYS 235 and its related attachments which covered Employee Interchange Agreements have been separated and captured in this policy.
**SYS 238, Payments to Foreign Nationals**

This policy will be effective upon approval.

Summary of Policy and Policy Revisions

- SYS 238 is one of three new policies replacing **SYS 235, Personal Services Payments**. This policy establishes the circumstances and procedures under which a UW System Institution may compensate a foreign national for personal services; reimburse the individual for travel; award scholarships, fellowships, academic prizes and awards; or compensate the individual for work as a research subject.
- The elements of SYS 235 and its related attachments which covered payments to foreign nationals have been separated and captured in this policy.
- Existing procurement, tax and payroll rules related to payments to foreign nationals have been collected and aggregated into this policy.

**RESCISSION- SYS 1236, Temporary Interchange**

Background Summary of Policy

- Wis. Stat. § 230.047 outlined the procedures for temporary interchange of personnel. Intergovernmental cooperation, including that specified in the Intergovernmental Personnel Act of 1970, is an essential factor in resolving problems affecting this state. The interchange of personnel on a temporary basis between and among governmental agencies at the same or different levels of government and with institutions of higher education is a significant factor in achieving such cooperation.

Rationale for Rescission

- This policy had substantial overlap and redundancy with policy **SYS 235, Personal Services Payments**.
- The substance of this policy has been merged with relevant sections of SYS 235 into the combined new policy **SYS 237, Utilization of Borrowed Employees**.
- No new compliance obligations have been created and no compliance obligations have been eliminated by this change.

The deadline to review and submit feedback for the policies below via the comment form is Wednesday, November 25.

**SYS 102, Policy on University of Wisconsin System Array Management: Program Planning, Delivery, Review, and Reporting**

This policy will be effective upon approval

Summary of Policy and Policy Revisions

- The purpose of the policy is to provide guidance on academic degree program array management actions, including approvals of new programs, review of program suspensions and eliminations, changes to programs, program reviews, as well as other required reporting and approval items at the Board of Regents or UW System level. The policy is being revised to remove the Procedures and Guidelines, to update policy language related to accreditation,
and to update minor policy changes. As a part of the UW System new policy process, the following changes are reflected in this version of the policy.

- Procedures removed and placed in a separate procedure document.
- Guidelines removed and posted in a separate guidelines area.
- Fast Track process added to pre-approval policy and process.
- Adding or removing a specific major to an A.A. or A.S. degree added.
- Adding or removing a concentration to an A.A. or A.S. degree added.
- Publishing or unpublishing an academic degree program added.
- Reporting Additional Locations changed to annual, not contemporaneous, reporting.
- Reporting of Dual Degrees changed to annual, not contemporaneous, reporting.
- Annual reporting of articulation agreements link to university website added.
- Reporting of first review of academic degree programs eliminated.
- Guidance on submajors removed.
- Submitting a Cost and Revenue Projections Narrative added to required authorization documents.

SYS 145, Development and Operation of Off-Campus International and Study Away Education Programs for University of Wisconsin System Students

This policy will be effective upon approval.

Summary of Policy and Policy Revisions
- This policy has been expanded to include expectations for study away programs.
  - In Section 4, Background, added verbiage about the benefits of study away for the student experience.
  - In Section 5, Definitions, added definitions for International Education Advisory Council and Study Away.
  - Policy is updated to include study away programs as a request from our universities.
  - Inserted “study away” where study abroad is mentioned.
  - Separated where appropriate international and study away.

SYS 146, University of Wisconsin System Faculty and Academic Staff for Study Abroad and Study Away

These policy revisions will be effective upon approval.

Summary of Policy and Policy Revisions
- This policy has been expanded to include expectations for study away programs.
  - Policy updated to reflect changes in SYS 145 related to study abroad and study away.
  - Added the study away option to each major policy element including definitions, responsibilities of faculty and staff, responsibilities of institutions and the UW system and host considerations.

SYS 160, Faculty Sabbatical Program

This policy will be effective upon approval.

Summary of Policy and Policy Revisions
This policy provides information on eligibility and procedures for the UW System faculty sabbatical program. There are no new eligibility requirements, rather a change in formatting the policy. These revisions placed the policy in the most recent policy template, and aligned policy content with Regent Policy Document 20-5, Sabbatical Leave Program for Instructional Faculty.

- In Section 5, Definitions, added definitions for Sabbatical and Sabbatical Leave.
- In Section 6, Policy Statement, added a section for Roles and Responsibilities of the Sabbatical Leave Process.
- In Section 6, Policy Statement, renamed subheadings to better describe section content.
- In Section 6, Policy Statement, reordered the substantive content.

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