



## Policy Library Information Session Transcript (WEBVTT) Wednesday, May 12, 2021

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[Jenny Faust] Okay. Thank you so much for being here today. Welcome to everyone who can join us.

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I am Jenny Faust, the Director of the Office of Strategic Consulting. As I hope you all know by now,

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my office, in the form of Charles Meyer, Kathy Contezac, and many, many, many other people, led the effort to create a searchable policy library for the UW-Madison campus.

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And today we've invited all of you here to talk about what this means for you, as someone who is involved in the development or care and feeding of policy on campus.

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And what we'd like to do is ask you to partner with us to ensure that this policy library is a success. And in order to do that, we need a campus-wide effort.

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So, what you see on this title slide is both the URL for the searchable policy library—that's a website that is [inaudible] interface—

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and also, a generic email account, called [policylibrarycoordinator@wisc.edu](mailto:policylibrarycoordinator@wisc.edu). So, this is the position, currently vacant and being filled by me and my colleagues in the Office of Strategic Consulting, that monitors the library,

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that makes changes, and so forth. So, what I will ask is that if you have questions about the library itself, you use this [policylibrarycoordinator@wisc.edu](mailto:policylibrarycoordinator@wisc.edu) account. We are monitoring that daily and we will certainly engage with you in conversations

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about the library, how it works, and how to make it better.

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So, without further ado, what I'd like to do is begin by discussing the roles of different players in policy development and maintenance here at UW-Madison.

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And those roles explain why we've invited you here today.

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There are really four main policy roles that have responsibilities attached to them, that we'll be talking about today.

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The first is the approval authority.

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So, this is the position or office with the final approval authority over policy, but also the right to enforce it, and so forth. So, you may or may not know this but typically this authority is granted by Wisconsin State law, state statute, or by the Board of

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Regents. And before that authority is delegated, the vast majority of policymaking authority resides in the chancellor's position. So, the chancellor of UW–Madison is the person authorized by the state to create policy for our campus. In some very narrowly

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prescribed areas, the faculty are authorized to create policy.

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But in fact, the chancellor has delegated that authority to most of the vice chancellors and then they, in turn, delegated that authority down to others.

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So, it's very policy-specific who has approval authority.

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The other important term that we use is the responsible office, so we want policy users, students, faculty, employees, staff, etc., to know what office to turn to if they have questions about a particular policy.

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So, in some cases, you've been invited here because you oversee an office that has responsibility for certain areas of policy.

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We also talk about policy managers. These are the people who are responsible for shepherding policies through the development process, for conferring with governance groups, for making changes to policy as law, or some other external force asks us to change policies, the

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policy manager is the person responsible for that.

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And finally, we have a term in the policy library called a policy contact. These people are not necessarily the approver or the policy manager, but it's the right person

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if you need to pick up the phone and ask a question about interpretation or, you know, is this the latest version of the policy or something like that. So, in the policy library, all four of these fields are filled in, and it's to allow our users of

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policy to know who to call and who has ultimate authority over it. As you can imagine, these are not always—the approval authority, manager, and policy contact—are not usually the same person.

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So, for example, the chancellor may actually sign off on the policy but she certainly is not going to be the person that you would contact if you have questions about interpreting that policy.

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So, you will see a role named in approval authority and policy manager, but policy contact you will see a name and an email and a phone number. And policy contacts will often be plural.

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So, these are the roles, and if your name is attached to any of these roles in the policy library,

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we've invited you to these info sessions, so that we can talk more about what this means in terms of your responsibilities. There are two other really important roles and responsibilities that are not named on this slide, but I'll mention very briefly.

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One is communications officers for the various policy managing responsible offices or attached to policy managers. The communications officers are going to be the people who are responsible for the publication or dissemination of policy information.

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And they're going to be very important in this conversation because we really need those folks on campus to help us to get the word out that the policy library itself is the primary source of truth.

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So, if policy is listed anywhere else, like on a web page, we really want to sync it with the library and not vice versa. So, the library has the latest, most up-to-date versions of policy, and web pages should pull from the library, and not be separate, because what

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we found in 2018 when we began this project were multiple copies of policy that were actually not the same. And there was no way to tell which one was the definitive latest version.

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So, communicators you're going to be incredibly important to this effort. And finally, governance groups and committees play a critical role in policy development.

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They are active in the development of policy. We want broad and deep stakeholder engagement. And so, all of the governance groups that work on policy—recommending policy, writing policy, and in some cases, approving policy—

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also have a critical role to play.

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Okay, so let's actually talk about the policy library briefly.

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And again, please feel free to ask questions or comment along the way. I've asked my colleague, Charles, to monitor the chat and let me know if there are questions, and I'm happy to pause.

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This is what the policy library looks like. This is the web interface, so behind this there is a database that includes the policies. This is the searchable web interface that our colleagues Bruce Barton and his team in the General Libraries helped us to

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develop. So, they're experts on finding information, so they've packaged this information in a way that's easy for you to find. So, you will see that there is a field here that you can search, you can put in a key term and hit Search and it will search

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every policy in the library. You can also browse by topic.

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And if you notice down here, there's a—in the bottom right—there's a featured policies list that we try to keep up with new things, recently revised.

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A good example of that is the conflict of commitment, but also what's on people's minds. So right now, we're featuring the COVID policies that are coming out or have been revised recently. So, we're hoping that you'll use this page, both as a search tool

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and as kind of a news feed around policy.

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That's just a pop-up of what we're featuring today, so that will be updated pretty consistently.

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I mentioned that UW–Madison university-level policies are what are in this

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policy library that we've created. We still have a few that we're cleaning up that are not yet public-facing, so I'd say we're 99.9% populated. There may be a handful of policies that are still, the responsible office wants to work on before they put

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them in the public-facing library. Saying that, I want to say that the Office of Strategic Consulting collected policies on campus in whatever shape they were in.

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So, we did not change policies. We just, you know, it's like shelving books; we took what was there. You will find that some policies are out-of-date, some are a little bit messy.

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That's just the state we're in, so that's neither good nor bad, but what this policy allows us to do is kind of see the current state we're in.

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So, we are working with a lot of offices on campus to update policies. Those policies have been on the website for years but somehow seeing them in a policy library has really brought everyone's attention to the fact that we still have some work to do

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to kind of clean up our policies and update some.

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So, we say all university-level policies; this is what we're talking about. So, this is UW–Madison policies by subject matter, roughly by, you know, vice chancellor/divisions; you'll see where this number changes daily. By the way, we're constantly

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adding to the policy library but we have about 800 university-level policies, and you see how it breaks down. About a third of those are Finance and Administration policies, about 20% are Academic Affairs,

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13% Student Affairs, and so forth. So, this is just the data, sliced and diced by subject area. If we further slice it in Finance and Administration, you see that HR policies make up a third of those, Transportation Services 15%, etc. So, this is the Finance and

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and Administration side of the house, you can see the breakdown here.

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Accounting and Business Services have quite a lot of policy and so forth.

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If you take the academic policies and break them down by the responsible office, you see that the grad school has about a third of those policies and APIR, the Academic Planning and Institutional Research Office, manages about another third of those,

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with the final third,

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you know, split between DoIT and Enrollment Management and so forth. Just to give you a sense of how policies on campus break down.

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Okay, so that's it for university-level policies. Again, we have about 800, but what I also wanted to highlight is for each policy in the library there also links that take you to other documents that are related to those policies, and I'll show you some

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some examples in a moment, so you can see where in the policy entry you can find this information.

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But if there is a policy—and this is true for every Business Services policy—has related procedures for example, those procedures are linked right in that policy. We have a field at the bottom that allows you to find forms, procedures, and other related

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documents.

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Here's another example. This is a little bit esoteric about the University of Wisconsin System, but student disciplinary policies are not UW–Madison policies; they're in the Administrative Code for the state of Wisconsin.

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That's a pretty esoteric fact that a student who attends here probably wouldn't know. So, if a student, let's say was in a conversation with a faculty member about, you know, academic honesty or something like that, and they wanted to know what are

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policies that that govern the, you know, shape I'm in right now, they wouldn't find anything if they were just searching UW–Madison policies. So, in that case, we've actually put a placeholder in there, explaining that student disciplinary policies are

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Higher-level policy and we link out to them. So, we're trying to make this policy as user-friendly and informative as possible. So, here's that example. I know this is tiny print.

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We're not going to read the policy right now. I just want to show you what is in there. So, in this red box, so this is the body of the academic misconduct policy, which doesn't exist at UW–Madison, so we put a placeholder in there.

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And at the bottom we say, what you need to see is the UW System, Chapter 14 policies, and so anybody who gets there, that's a live link. They can click on that link and go to the policy that governs them.

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That's a kind of placeholder. This would be a much more typical policy, the conflict of commitment policy, which has recently come out. In this case, we link out to—again, small print, I'm sorry, I apologize for that—

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But we link out to the various employee group handbooks or policy documents. So, we have academic staff policy and procedure—or ASPP. There are several relevant chapters in that document that we link out to there.

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We also have faculty policies and procedures; again, we link to those relevant documents—that's all these links.

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But we also have links to the outside activities report. So, the conflict of commitment requires people to file a report annually; they can get to that report by this link.

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So again, if you are a policy manager or you lead a responsible office, and you want to take a look at your policies, we've already done this once, but if you're on this call and you're curious to see, you can go look at your policies and see if all the

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relevant links are in there, and we can update those fields, if you want additional information to be linked.

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Okay, so there are policies in the library and there are other documents that are linked to those policies.

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The other thing that's.

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Sorry. Does anybody have a question? I hear somebody unmuting.

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No, we're good. Okay, um, in addition to policies themselves, we also have links to entire sets of policies that govern us as students, faculty, and staff here at UW–Madison. So, of course there's Wisconsin State statute,

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there's an Administrative Code, there's UW System policy and so forth. This policy library takes you to all of those if you also want to search those. And we also had a very robust working group pulled from people across the campus that wrote guidance

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on developing policy here at UW –Madison. So, if you're new to the campus or if you're new to working with policy, we have a website that will help you with that.

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So, I'll show you where those are.

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This is back to the policy home page. This is policy.wisc.edu. If you look up in that upper left corner, you'll see that there are two tabs.

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The first one is called "Policy Development." That takes you to the guidelines that I just mentioned, and we'll look at that page in a moment. The other is a pulldown menu that takes you to other policy libraries. So, the Wisconsin State statute,

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the Board of Regent policy, and so forth. So, we hope that's a helpful link.

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This is the Policy Development tab that's in the upper left that I just mentioned. It takes you here. So, you can see the URL, it's [development.policy.wisc.edu](http://development.policy.wisc.edu).

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If you scroll down on this web page, you'll find guiding principles and so forth that the work group put together for us. If you look here in this box over to the right, you'll see that there are certain tools that we have loaded here.

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We're going to continue to build this library of resources for people working in policy. It starts with terms and definitions, so certainly if you are writing policy, and you want to define key terms, we ask you to look there first.

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So, if one of our definitions suits your need, go ahead and use it in your policy document if it's helpful.

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There's a policy life cycle, a policy template, including a version with instructions. So, if you are developing policy, we now have a shared template This includes all the fields that are in this policy library so we do encourage you to use the template

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if you're developing policy. And then we have best practices, all of which we'll talk about momentarily.

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Right. So, here's the policy life cycle. We're not going to get into the details here, but I think what you'll see is that this is a clear, one-stop visual for how to think about the policy life cycle.

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There are a couple things to really point out here. One is, if you're really starting from scratch, the first question to ask is, is policy necessary, right.

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So, is the problem I'm trying to solve by writing policy really best solved by writing a new policy or is there may be a policy that already exists, that can be modified.

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The other is, we talk about approving policy but also retiring policy. Hardly anyone ever thinks about ending a policy's life, but sometimes that's the right thing to do.

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Often a higher order, like court or statute or federal government—sorry—

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or federal agency requires us to have policy, and sometimes that mandate goes away; we don't necessarily need that policy anymore and maybe we don't want it.

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So, we really do want people to think about the whole spectrum of options here. That's the life cycle, it's on the development web page.

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This is the policy template. Again, we're talking about very small font. I'm just pointing out to you what is here. This template actually mimics the fields in the library itself, so behind the scenes of course, we are loading, all of these policies

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into a database that's searchable by all of these fields and will ask you for things like the next review date. That kind of information is optional, but if you are a policy manager, you may want a date in there.

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You may want to say, "I want all my policies reviewed in five years." This library is here to serve the campus; we could pull a report for you, that gives you all of the policies that are assigned to your office, with the next review date.

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So, most of these dates are set by you.

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We can put a default in there if you want. We are recommending that people look at their policies every five years, not necessarily all at once, so we can stagger those dates.

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If you want a more frequent policy review cycle,

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that's up to you. So again, this is a tool for your use. And again, this is the policy template. There's also a version that has instructions embedded in it, so you can pull that version if you want guidance on what each of these fields means for us.

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Let me take a break here. We will get to what I consider the most important piece of this info session, which is kind of what we're asking of you, but let me ask Charles—give me just a quick sign—do you have any questions in chat or anything we should pause

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for? [Charles] I'm getting awfully lonely in the chat, Jenny. [Jenny] Okay. All right. Well, I, I will keep talking and thank you. All right let's talk about publishing policy.

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This is the foundational assumption of a workable policy library for the campus. The policy library is the repository for official university policy; if it's not in the library,

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it doesn't count. So, if somebody finds a copy laying around—and we did this, it was actually kind of a fun piece of this project—we inventoried every policy-like document on campus two years ago.

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Lots of them ended up not in the library because they were actually other kinds of documents, like interpretive documents or handouts for guidance.

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But people came to us with binders of paper from like 1940 and said here's some policies.

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And I hope you'll understand that

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I'm laughing about that but, you know, if one person knew about that binder, it was hardly university policy for the rest of the campus, right. So, we did in fact review all that paper and consult with the governance groups, etc., to figure out what was

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actually policy and should go in the library, and what was some other kind of document that someone created 80 years ago. So, from here forward, if it's not in the policy library, it's not university policy.

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I mentioned this earlier, if you want policy on your website or in a KB or something else, if you have a kind of established history for your office and for your constituents that they can find policy on your website, we're asking you to do one of the following

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things: you can still have it on your website, we're not saying take it down, but we're saying if you want to keep policy on your own website, we'd ask you to link to the library.

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So, if you just want your constituents to have a handy link—maybe it's alphabetized, maybe it's in key terms that your users will recognize—perfectly fine with us, but we're asking you to embed the link to the actual policy itself, not to recreate the policy.

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What we found in 2018 when we were inventorying policy, is almost everyone who quote "reiterated policy" on their website,

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did only partial. They, you know, they cut and pasted some parts of a policy, which is kind of misleading. So, we really want people to see, if there's a policy,

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take them to the whole thing.

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The second option is, if you want a summary, if you want to say, this is what the policy that I'm linking to says, we want you to say that this is a summary, and we want you still to link them to the library

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if you want your users to see the whole policy. And finally, this is the most complex, and maybe the best solution for you depending on what you want, but you can have your website, literally pull the text from the library.

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This is beyond my technical skills but there are lots of wonderful people on campus who can help with this. One of them is Charles. So, there is something called the Application Programming Interface that you can code into your website to pull from the

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policy library itself.

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What that means is every time the policy is updated, your website automatically updates. So, if you want that kind of, you know, real time policy publishing on your website,

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this is the option to use. We can help you with any of these three.

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They obviously, some are more simple and some are more complex, but we're really asking every campus office to stop duplicating policy. Don't have a separate version on your website that you go in there and update,

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because we'll very quickly have multiple versions.

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Okay. A few best practices and then I hope we'll open it up for comment and question.

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The first thing we want to do, is ask you what I just said, and I'll repeat: please don't duplicate policy on a website without linking to the library.

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We don't want multiple versions.

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We're starting to get really careful about using the word policy. We found a lot of documents with the title of "Policy on X," and then the very first paragraph would say something like, "Here are some guidelines that you might want to consider when you're

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doing x, y or z."

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So, the language didn't sound like policy at all, it sounded like it was optional. So, we're really trying to tighten up. Policy is something that people are restricted by doing, or they're required to do, or there are certain things that they're not allowed

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to do. Policy is really ought or must. If you have some guidance to people who are working in an area, that's not technically policy. So, we really want people to kind of understand the different kinds of documents that are out there and use the term policy

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only for the restrictive kinds of documents that really are policy.

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And by the way, that have gone through the right approval process. So, you know, I can't just sit in my office on campus and write policy for the UW–Madison community. It has to go through a proper process and con, you know, consultation with the right people,

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and then the authorized person sign off on it. So, the chancellor can write policy if she wants to, but very few of us are allowed to do that without someone else signing off on it.

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So, we want policy to be restricted to those narrow cases.

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And finally, and this is the slide we started with. We really want people to understand the different roles and responsibilities involved in policy development and maintenance and understand if you are in one of those positions that has a role,

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what that, you know, asks of you and what, we as the coordinators of the policy library, can do to help you.

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We do have that guidance on the website, so if you are working in the policy space, we ask you to go ahead and review those guidelines for policy development at UW–Madison and if you have any questions, consult with us, happy to do so.

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Use the template if you're drafting new policies.

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And if you already have policies, or if you're working on new policies, ideally, we would ask that you separate out policy language from procedural language, right? So, policy is, you must get approval from such-and-such an office. Procedure would be, annually, by April

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15 you need to, you know, submit this form. So, policy is what people must do or cannot do and the procedure is how to go about letting the university know that you're in compliance.

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We have multiple ways of incorporating procedures in the policy library.

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I've mentioned that we took whatever was out there in terms of policy, so some policies embed procedure. And those are just in that format in the library.

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We also have some where the actual policy document has a separate section, called procedures. And finally, there are some offices that have created procedural documents that are separate.

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In those cases, we link to those documents at the very bottom where we have relevant documents. So, there are lots of different things that you can do to signal to people what's policy and what's procedural.

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But ideally, we'd ask you to understand the difference between the two and if you are working on new documents, to separate out those two segments of policy. Jenny, as a follow on to that,

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we have a question from Melissa about the publishing of, for links to policies, procedures, and guidance. And could you clarify, you know, if you want to provide additional context to procedures that relate to the pieces of a policy, what's the

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best way to do that?

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You can probably answer that question, but I'll get started. The best way to do that is probably to have a separate document and let us link to that document.

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So that document can live on your website or in a KB or somewhere else. But ideally, and especially if you're revising now or if you're just starting out, take procedures entirely out of the policy document itself, and make that a separate document that

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we link.

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Do you want to add to that Charles? [Charles] I'll add just a little bit. Part of the question is about additional context, which I will interpret as guidance. So, context is about guidance and how to interpret the policy or what the policy means, and we can link

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within the policy to the related guidance documents.

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That's the best way to do that and make sure that things can flow back and forth, because of course, if you've got the guidance and the procedures on your own website you can update those anytime.

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And that should be more nimble than the policy documents, which should be changed through a more thoughtful process.

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[Jenny] Thank you. I think in the research policy universe, there are a lot of guidance documents. So, you know, they're pretty complicated federal regulations in that area and I know that the research administrators have a lot of guidance documents and where we

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have policies, we definitely link to those guidance documents as well. As a follow on to that, Sarah is asking, can we link to procedure manuals, and we've covered that, yep, you can link to those from the policies.

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Sometimes what we find though, is that these manuals tend to intersperse policy and procedure, and what we want to do institutionally is try to get away from intermingling manuals that include everything in the manuals, maybe have a brief reference and

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then a link to the policy in the policy library.

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Hopefully that answers the question, Sarah.

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And then Allen is asking, when divisions or departments have internal policies, are you okay with the term policy there?

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And the short answer is yes, absolutely. So, you know, earlier in this presentation I mentioned that we recognize higher order policies in the library by linking out to the Board of Regent policies and so forth.

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We also recognize that there are policies at lower levels than the university level.

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In fact, I had mentioned it, but we anticipate in a future phase of this policy library to pull in school and college policies. So, we are already working on a pilot, where we're using one school to pilot the level 2 searchability of the policy library.

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So, we recognize that there are lots and lots of levels of policy, you can absolutely use that word.

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We will stop at the school college level, so eventually this, this policy library will have UW–Madison and school and college policy, and anything lower than that will continue to live locally in a KB or a website or however, on your intranet, however

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you currently store your policies, but you certainly can use the word.

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And I think the key there is to just be clear that it's a unit-specific policy, and to not leave the user with the impression that this might be a university-wide policy. At risk of piling on to that Jenny, a couple of questions about where to house procedures

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and guidance documents, and there's a question about whether it's okay to collect those in a KB, in a KnowledgeBase, on a web page—any guidance about that?

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Yeah, I mean I think I'm agnostic about this. I think whatever works for you.

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If it's linkable and, you know, we can get the people to find your policy, to those other documents, I would say use what works for you, you're already using the KB, that would be fine.

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And then lastly, before we move on, do you have or are you planning templates or content-based practices, procedures, and guidance documents?

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Great question. The short answer is yes, we are working on that and my colleague Kathy Contezac who is the communications officer for my office, has been taking point on that. I believe we already have a template for procedural documents.

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We are already working with a couple of units on campus to use that new template. So, Kathy, can you nod if I'm right about that. We have a procedures template, is that right?

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Yeah, we have a draft of a template that I think we're still vetting a bit, but yes, we are working on that. Okay, so if anybody's interested in that, give us an email.

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Either you know, use that [policycoordinator@wisc.](mailto:policycoordinator@wisc.edu), [policylibrarycoordinator@wisc.edu](mailto:policylibrarycoordinator@wisc.edu), and we'll share that with you, and you can help us refine it. If it doesn't meet your needs, you can let us know why and we'll update that. So, like I said we're kind

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of piloting these many different things, so we can certainly help you with procedural documents if you want that guidance. I think we're momentarily caught up on questions. If I missed yours, feel free to put it in the chat again

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while Jenny gets through the rest of the presentation here. We are very close to the end, so I have a couple more best practice things to say. This is if you already own policy, if you have policy in the library, and you want to make revisions.

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This gets a little bit in the weeds, this slide, but I think it's worth saying. So, if you're going to make major changes, like you have a policy that's, you know, 10 years out of date and you're kind of starting over, and I'm thinking of something like, we

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used to have something called the Telecommuting Policy, and now HR is working on the Remote Work Policy; it's really a complete overhaul of the policy.

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If you're in that kind of scenario, you can give us the new policy and say, this is an update of this other policy that you already have in the library, please retire the original and take this one.

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And we will upload that new policy.

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If you're making changes, however; if it's not a complete substitution of one policy for another, what we'd like you to do is actually start with what's in the policy library.

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And the reason for that is we can then see what you're changing. So, I have to tell you that we're already getting lots of changes, and it's really hard for us

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if we get a document that says please make these changes in the library, and there aren't any changes tracked. It's very hard for us to know what changes and we have to actually have staff

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read the two documents side by side. So, we're asking you that if you are modifying an existing policy, to use what's in the policy library as your starting point.

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There is a button in the library that allows you to print the PDF version of the policy that's in there. You then just take that PDF and convert it to a Word document and turn on track changes, and then give it back to us with changes that you want made

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in the library, and we will make the changes that you noted. We are asking right now, because we don't, we're not using electronic workflow, that if you do ask for changes to existing policy, you copy the approval authority if you're transmitting those changes,

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so that we know these are approved changes.

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You'll have to forgive me and my office for not knowing every single person on campus and what their responsibilities or their authorities are. We're going by the approval authority listed in the policy library.

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So, for example, if that approval authority says the vice chancellor for finance and administration is the approver,

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that vice chancellor needs to know that these changes are being made. And we're not going to email every vice chancellor and say, "Hey do you know that this person requested these changes," so if it's not obvious, like if it's not coming from the vice chancellor

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or his or her office, we will ask you in your transmittal to us, if you're asking us to make changes in the policy library, we're asking you to let us know that they're authorized changes.

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And when in doubt, please just contact us for guidance.

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I will say, I'm certainly not a technical expert, but Charles and some of our colleagues, including Bruce in the Libraries, are certainly adept at making these kinds of changes and we can help you.

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So, the Office of Strategic Consulting is the de facto policy coordinator for now. We're here to help you, this as a service to the campus, we absolutely want to make your jobs easier and we're hoping that this tool helps us to do that.

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So, with that, I'm going to stop and just ask if you have any questions. Remember [policylibrarycoordinator@wisc.edu](mailto:policylibrarycoordinator@wisc.edu) is the email to use. By using that email, we can all kind of check in and see, and if it's a technical question, the right person will answer

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it. So, I'm going to stop the screen share here, and open it up for comments. We have a small enough group that folks can feel free to either put the question in the chat or unmute, and while we wait for that we do have a question here from Stephanie,

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Jenny, "What if the approval authority is a committee?"

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That is a great question. This, by the way, is fairly rare. Out of the 800 or so, we have maybe, you know, 15 policies where a committee is actually the approver and that's either by statute or federal code or something.

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We treat the committee chair as the de facto approver. So, one thing you'll notice in approval authority is it's generic, so it will say for example, vice chancellor for finance and administration. As you know, people change positions,

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so, it's a role. So, even if the approval authority is a committee, we treat the chair of that committee as the current, the incumbent as the approver.

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Yeah, Carrie.

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I'm so happy you're having this meeting today. At 8:30 this morning, I was in a revision discussion of a policy that we're working on. And I thought I would take it here and get a ruling, on a friendly debate we're having. We need to decide about a particular piece

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of content that is related to a definition and also related to the scope of the policy that we're working on, and I was lobbying to put it in both places just to, you know, bias you,

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but there was some discussion about the harm of repetition, versus my opinion about reinforcing it and I just kind of, I know I'm biased here with asking this question, but I wanted to know your thoughts on the scope of the policy, and then where

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some of those things apply to particular definitions. Thoughts about repeating it?

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Well, I'm going to ask Charles to weigh in here because he's much closer to this question than I am. He's been through 800 revisions by now.

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Do you have an opinion on that Charles?

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[Charles] I always have opinions.

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So, I'm going to speak broadly and generally about this, but I promise to come back around to the specific question, and then I'll also put Kathy on notice. It may be an opportunity to talk about plain language a little bit.

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So, you know philosophically, one of the guiding things that we've gone back to with all the various teams and wonderful people involved in creating the policy library has always been about keeping the user in mind.

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And how do we make this more user-friendly as a campus? How do we move from putting users in a position to wander around web pages trying to find stuff and then trying to understand what they've read and understand if it's current and so forth, to making

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things as standardized as possible, given the variety of things we do across campus?

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How do we use common language? How do we lay it out in a common way so that users can quickly understand what they've encountered and how to make meaning out of it?

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And one of the ways we do that is by laying out the definitions at the start of a policy, and that's a little bit different from scope, right? Scope is about

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what's the latitude and sometimes the vertical way that this policy applies. So, I guess that's a long way of saying I would advocate for, if it's a definition and people need to understand the term and what the term means, put that in definitions.

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I'd be happy to talk with you more on the side about whether what you're wrestling with is a definition or a scope.

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And then lastly, just to pivot here, Kathy, we've been thinking a lot about how do we take things wherever possible that don't have technical language and make them very user-friendly and make sure we're using plain language, so that these policies

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are accessible to everyone. Do you have any thoughts about that Kathy?

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[Kathy] Yeah, just a couple of additional thoughts about that, you know, one of the, there's a lot of different aspects of plain language and some of them are fairly easy to implement. And we're all probably, this campus and many places I've worked, are guilty of the

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same thing, which is like, as we all know we use zillions of acronyms on this campus. And so, when you're doing policy, you know, it's important, there's got to be like first reference, you know, spell things out on first reference and then

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you know, you can use the acronym after that. But there's, you know, obviously many things that we've seen in policies where, you know, there's acronyms that, you know, we're having to dig around and Google around the website and try to figure out, you know

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what the acronym means. And oftentimes, because we're such a large university, we have an acronym that can have multiple meanings, so that's why it's especially important for people to do that.

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So, that's just one really small example. I think the other thing is we recognize that there are policies on campus that are fairly technical and need to be, but again, you know, I think it's about sort of the intent of trying to, to the extent possible,

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when there are complex terms or complex, you know, ideas, is trying to explain those in the best way possible. I think there's a tendency always to assume that, you know, anybody who's accessing this policy knows what this means. I think that's often

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a false assumption. So, I think, you know, there has to be a little bit of a level set there that to not always assume that, not always assume that everybody has the same level of expertise.

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So, those are just a couple of things.

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And just using, you know, we like to use a lot of words, but, you know, being concise is always a best practice too, and not using, you know, a lot of extra words. I would add one other thing, which is about the question about repeating things.

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You know, I think anybody, many people who are in communications roles say sometimes that repetition is helpful, right? So, depending on what it is, it can be helpful. So, I don't think it's always a bad thing to have some repetition, in particular for emphasis.

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[Jenny] Okay, thanks Kathy.

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I'm going to pause here to see if anybody else wants to unmute and comment or question.

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Also, anything in chat, Charles, let me know.

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[Charles] Yeah, we have crickets in chat at the moment and of course I'm counting on some of the former project team members to ask the really hard questions.

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[Jenny] Well, I just will sort of start to sum up by just saying if anybody on this call has questions about those roles that I began with, like if you see your name next to policy manager or something like that, if you have any questions about what that role asks

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of you, please feel free to unmute now, or use chat to ask. And otherwise, we'll wrap up. So, let me pause here for 30 seconds or so.

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Thank you very much for the kind comment, Jenny. 99.9% of the credit goes to Charles and the project team which included many people on this call. I see Heather's here, Heather Daniels, and Kathy in communications and Jenn Senn on our tech team, etc. So, lots and

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lots of people put in good work on this. Thank you so much for your time today. I really appreciate you coming and being our partners in this, so this will be a success if we all work together.

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We are here to answer your questions, help you, provide advice and counsel, and will roll up our sleeves and help you revise your policies if that's what you want.

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Again, thank you so much. We do appreciate it. It's great to see you all here. And please follow up if you have any questions.

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Charles, any thoughts?

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[Charles] Only that some of the next steps—because this is a work in progress, right? We'll never be fully done, done—

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some of the next steps include that we will be following up just to see if your websites are linking to the policy library, if we have any concerns about old policy content or material that's hanging around out there.

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And one thing we've learned is oftentimes people don't know that there's a PDF copy of one of their policies floating around, so we'll try to drive that to your attention where we can.

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[Jenny] Great, thank you and I forgot to mention one other next step. And if you want this sooner rather than later, feel free to reach out; we will be pulling reports from the library for every approval authority, for every responsible office, etc. so you can see

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what's assigned to you. And we'll just review those sometime in the coming year. So, if you have questions about what you are responsible for and you want to take a look at that. We're still doing some cleanup; we're tightening up some policy titles and so forth. But in the next few months, we'll be reaching out to everyone with those lists, so you can see what we think has your name next to it. So, with that, I will close. Thank you so much, I appreciate it.