April 4, 2024

Spring 2024 Policy Library
Information Session
Agenda

Policy Library Staff Introductions
About the Policy Library
Policy Library Trivia!
UW-Madison Policy Vocabulary & Standards
Roles and Expectations
Policy Lifecycle
Comprehensive Policy Review
Resources & Tips
What’s Next?
Policy Library Team

Nicholas Oleksy
Policy Library Coordinator

Kerry Grosse
Policy Analyst

TJ Sargent
Policy Analyst
About the Policy Library

- Policies hosted in multiple locations
- No standard campus process for policy creation, approval, or vetting
- No single location for official policy

2018 and Before
- Provost and VC of Legal Affairs identify need for centralized policy hosting location
- Workgroups build solution, populate content, and launch Policy Library

2019 - 2021
- Comprehensive Policy Review process begins

2022
- School/College/Division policies begin to be added to Policy Library
- Process and technology improvements implemented for Policy Library

2023
- Comprehensive Policy Review process is focus
- Develop resources, tools, and communication to support policy management

2024
Policy Library Trivia
How many policies are currently published in the Policy Library?

<table>
<thead>
<tr>
<th>Range</th>
<th>Count</th>
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<tbody>
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<td>&lt; 500</td>
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<td>900 - 1,000</td>
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<tr>
<td>&gt;1,000</td>
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</table>
How many policies are currently published in the Policy Library?

900 – 1,000
1. ADA/Accessible Parking

**RESPONSIBLE OFFICE:** Transportation Services

**POLICY NUMBER:** UW-6107
What was the most viewed policy in the Policy Library in 2023?

- UW-600 Football Bags and Carry-Ins
- UW-601 Non-Football Athletics Events Carry-Ins (Kohl Center & other Facilities)
- UW-807 Faculty Policies and Procedures Chapter 7 – Faculty Appointments
- UW-1208 Enrollment Requirements
- UW-5050 Personal and Legal Holidays
- UW-5052 Vacation
What was the most viewed policy in the Policy Library in 2023?

UW-601 Non-Football Athletics Events Carry-Ins (Kohl Center & other Facilities)
Which month in 2023 had the highest total number of Policy Library views?

- MAY
- AUGUST
- SEPTEMBER
- OCTOBER
- NOVEMBER
Which month in 2023 had the highest total number of Policy Library views?

OCTOBER
Which is NOT a top 5 search term in the Policy Library for 2023?

- Animal (program, care, research, training, policy)
- Remote work (agreement/policy)
- Sick (leave/time)
- Travel (policy)
- Vacation
Which is NOT a top 5 search term in the Policy Library for 2023?

Remote work (agreement/policy)
Terms Searched on Policy Library Site – 2023

#1 | Animal (program, care, research, training, policy) – 873
#2 | Vacation – 725
#3 | Sick (leave/time) – 626
#4 | Travel (policy) – 564
#18 | Remote work (agreement/policy) – 269
# UW–Madison Policy Vocabulary

## Policy
- Mandates, specifies, or prohibits conduct
- Ensures compliance with laws, regulations, or operational efficiency; reduces institutional risk

## Procedure
- Operational process necessary to implement policy
- May change frequently to accommodate updated standards or methods
- Can be linked in “Related UW–Madison Documents” in policy

## Guideline
- Informational, not mandatory or enforceable
- Provides recommendations, interpretations, administrative instructions, best practice guidance, or frameworks
Researchers are encouraged to submit a Widget Use Plan prior to submitting funding proposals.
Is it a **Policy**, Procedure, or Guideline?

The use of widgets is **prohibited** in all university locations.
Is it a Policy, Procedure, or **Guideline**?

Researchers **should** build their own widgets or purchase one through an approved vendor.
Is it a Policy, Procedure, or Guideline?

The following are to be conducted after widget publication:

I. Links updated on all departmental sites that use the widget

II. Send email advertising the widget to users

III. Emails about widget operations are forwarded to the web admin
UW–Madison Policy Standards

Should/May vs. Must/Will

- “Should” or “may” imply that there is a choice; “must” or “will” indicate a requirement
- In most instances, “must” or “will” is the appropriate term
- Consider: Is choice intended?

Keep it Short & Simple

- Use plain language; avoid jargon and technical terms
- Edit for length, clarity, and redundancies
- Use ordered lists (substantial explanation is not needed); easily citable

Accessibility & Inclusivity

- Link/embed URLs in text (hyperlinks)
- Avoid tables
- Ensure alignment with university values and equitable treatment of all members of the campus community
- Have policies reviewed by accessibility/inclusivity subject matter experts (SMEs)
<table>
<thead>
<tr>
<th>Roles and Expectations</th>
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<tbody>
<tr>
<td><strong>Policy Contact</strong></td>
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<tr>
<td>• Subject matter expert (SME)</td>
</tr>
<tr>
<td>• Serve as first point of contact for questions or interpretation</td>
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<tr>
<td>• Communicate policy development and revisions to stakeholders</td>
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<tr>
<td><strong>Policy Manager</strong></td>
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<tr>
<td>• Develop, interpret, and enforce policy</td>
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<tr>
<td>• Responsible for related procedures, processes, instructions, forms, and revisions</td>
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<tr>
<td>• Ensure that appropriate SMEs, inclusion experts, Legal Affairs/Compliance, and Committees/Governance have reviewed and offered suggestions to policy updates</td>
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<tr>
<td><strong>Approval Authority</strong></td>
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<tr>
<td>• Right to issue, approve, and enforce policy</td>
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<td><strong>Policy Library Team</strong></td>
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<td>• Research, develop, and update policies in collaboration with contact/manager/approval authority</td>
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<tr>
<td>• Provide support and facilitation for campus partners in creating and maintaining policies</td>
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Policy Lifecycle

1. IDENTIFY NEED
   Need for a new policy could come from any source, external or internal.

2. DRAFT AND EDIT
   Policy Manager drafts or edits policy using the policy drafting template.

3. REVIEW/REVISE
   Policy Manager solicits appropriate stakeholder review for feedback and revises accordingly.

4. CONSULT
   Policy Manager consults with appropriate committee(s) and/or advisory group(s) as needed to get feedback, suggestions, and concurrent approval prior to routing to Approval Authority.

5. APPROVE/RETIRE
   Approval Authority approves draft or modification(s), and it becomes policy. If Policy Manager recommends retiring a policy, approval results in removal of policy from the Policy Library.

6. PUBLISH
   Policy Library Team publishes policy in the Policy Library and provides appropriate link to Responsible Office for communication.

Start here when proposing new policy

Start here when reviewing and modifying existing policy
Comprehensive Policy Review Process
Why do Comprehensive Review?

- Policies were entered into library “as is”
- Consistency benefits end users
- Supports campus in mitigating risk
- Part of VCFA Strategic Plan
Focus Areas of Comprehensive Review

Formatting:
fits policy template, ordered lists, remove redundancy

Plain Language:
easily readable, consistent vocabulary

Policy Focus:
process/procedure linked in references
Partnership with Responsible Office

- Provide systematic review
- Integrate SME/stakeholder feedback
- Identify gaps where new policies are needed
- Receive support and expertise from Policy Library Team
Policy Library Resources & Tips
Guidelines for Policy Development at UW-Madison

This web page outlines the UW-Madison policy development, revision, approval, and retirement process for university policies that apply generally to any member of the university community. Individual schools, colleges, divisions, departments, and units may have their own policies that apply to individuals working or studying in those entities; if the entity’s policy contradicts or is less restrictive than a university policy, the university policy supersedes the school, college, division, department, or unit policy.

Employees, students, and all other members of the UW-Madison community are also subject to federal and state laws, rules, and regulations, including policies of the University of Wisconsin Board of Regents and the University of Wisconsin System. If a UW-Madison policy conflicts with any Board of Regents or UW System policy, or with any state or federal law, rule, or regulation, the university policy is superseded.

UW-Madison formally approves university policies through an established process, publishes those policies in a consistent format, and maintains those official policies in a widely accessible searchable policy library. The policy library is maintained by the policy library coordinator.

Policies are developed, reviewed, and approved in a manner that ensures consistency with the university’s mission and with applicable law and guidance. Review and approval processes must be appropriate to the scope and impact of each policy. Each policy has a designated policy manager and responsible office charged with adhering to these guidelines for developing university policies, including drafting, revising, approving, distributing, maintaining, and when necessary retiring university policies.
**Definitions**

- Short and to the point
- Do not use full term in definition
- Are used in policy

<table>
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<th>Definitions</th>
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<tr>
<td>Academic Plan Code: A code representing a formally approved academic offering such as a major (e.g., BUS 623, Business: Management and Human Resources, BBA), minor, or certificate within an academic career and program. This code corresponds to the degree-major in which a student is enrolled and awarded.</td>
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<td>Academic Program: An area of study that leads to a degree/major, certificate, minor or named option.</td>
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<td>Degree-Major: Combination of the degree and the major, represented in the academic plan code, that signifies a credential that has been authorized for UW-Madison by the UW System Board of Regents.</td>
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<td>Individual Major: An individually tailored curriculum for undergraduates that fulfills major requirements; offered by College of Agricultural and Life Sciences, College of Letters &amp; Science, School of Education, School of Human Ecology.</td>
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## Policy Library Tips

### Related Content

- UW-Madison Policies
- UW-Madison Sites (Documents, Web Pages, Other Resources)
- External References

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<thead>
<tr>
<th>RELATED UW-MADISON POLICIES:</th>
<th>UW-1204 Graduate School: Continuous Enrollment Requirement for Dissertators</th>
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<tbody>
<tr>
<td>RELATED UW-MADISON DOCUMENTS, WEB PAGES, OR OTHER RESOURCES:</td>
<td>Authorization for Courses</td>
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<td>Credit Overload Request Form</td>
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<td>Financial Aid, Loan Deferral, and Taxes</td>
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<td>International Student Services</td>
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<td>Office of Student Financial Aid</td>
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<tr>
<td>EXTERNAL REFERENCES:</td>
<td>UWS 206 Student FICA Exemptions</td>
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Policy Library Tips

Websites
- Links to policies on websites must point directly to Policy Library location (policy.wisc.edu/library/uw-#####)
- Avoids confusion and lowers risk (finding two different published versions of a policy could be evidence of inconsistency)

Delegation of Authority
- If delegating authority in policy (“or their designee”), the policy must clearly establish who delegates and any necessary documentation

Policy Communication
- When a policy is updated or published communicate with stakeholders about updates, including a direct link to the policy in the library
What’s Next?
What’s Next for the Policy Library?

- **2024**: Conduct Comprehensive Policy Review
- **2025**: Implement Active Review Cycles for All Policies
- **2026**: Add School/College/Division Policies to Policy Library
- **2027**: Develop Resources, Tools, and Communication to Support Policy Management
- **2028**: Determine Clear Delegations of Authority
What’s Next for You?

Complete follow up survey to help us understand your support and engagement needs

Reach out to the Policy Library Team for assistance or if you or your team have questions

Contact: policylibrarycoordinator@wisc.edu