

Policy Writer's Checklist

Reviewing your policy sections and exhibits:

- Request the most recent word processing file from the Policy and Communications Assistant at policy@ucdavis.edu; 530-752-9745. Do not create your own files by copying text from the Web site when making changes.
- Check that the "Track Changes" feature is turned on in the file before keying in changes. (The TRK should be displayed in black on the status bar at the bottom of the word processing window. If TRK is gray, double click that area of the window.)
- Keep in mind the purpose of the policy section. Think specifically about what information campus departments will need in order to use the policy and complete their work accurately. Promotional information and details regarding your internal administrative procedures are not necessary.
- When reviewing your procedures, focus on being clear and succinct. Streamline procedures when possible, but provide enough information that policy users can complete their tasks easily.
- Attempt to limit your policy section to the least number of pages necessary to keep it as user-friendly as possible. Policies that are longer than 6 pages should be closely reviewed to determine if they are addressing too many issues in a single policy, or if they are providing extra information that is not necessary. Policy sections can sometimes be divided into two or more smaller sections to provide clearer direction.
- Check all related policies and laws to ensure your policy is in compliance and discuss major changes with other stakeholder departments so they are alerted to the potential change. Be aware that changes you make to one policy section may affect others.
- Check all contact information, department names, position titles, phone numbers, email addresses, and referenced sites in your policy to ensure continued accuracy.

Writing new policy sections:

- Download the policy template from <http://manuals.ucdavis.edu/Resources.htm>. The template contains instructions for using the styles specifically created for each of the Policy and Procedure Manuals.
- Complete the general information at the top of the policy section template, including the department responsible for the policy, and the systemwide policy that is the source for the campus policy when applicable.
- Refer to the Preface of the Policy and Procedure Manual for guidelines regarding the standard structure for policy sections.
- Contact the Campus Policy Coordinator, Molly Theodossy (mmtheodossy@ucdavis.edu; 530-752-2407) to establish a section number, for assistance with writing and organization of the policy, and to review the policy for proper structure and clarity while in the development stage.

Submitting drafts for formal review:

- Submit the electronic draft to your unit policy coordinator along with the following information:
 - A brief summary of the revision.
 - The names and departments of people who have been consulted on the update or development of the policy section.

- The names and departments of people who the responsible department feels should be included in the formal review.
- Your unit policy coordinator will review the policy section, make any additional changes that are necessary, and submit the draft to the Policy and Communications unit.
- The Policy and Communications unit will review the policy section, making any editorial and structural changes needed for clarity. You will be contacted regarding any questions on the content of the policy.

Procedures for Review and Approval:

- You will receive a copy of the revised draft of the policy, via email, for your review. The review request cover sheet will list the names of all individuals who have been asked to review the policy and the deadline to submit changes.
- Submit any needed revisions, either via email or on hardcopy, by the deadline.
- Once the comments have been gathered and reviewed, you will be contacted regarding any comments that require your further follow-up.
- When all comments have been resolved, you will receive a final draft of the policy that incorporates the additional changes required from the review. Read the policy section carefully, sign the approval cover sheet, and forward the policy and cover sheet to the next individual listed on the cover sheet.

Annual Call for Updates:

- Review the sections listed on the update list.
- Determine which of the following actions is required for each policy section:
 - *No changes required—all policy statements, procedures, content, contact information, references, links, etc. are accurate and the policy can be reissued as is.*
You will receive a final approval with the attached policy to verify that the policy section remains completely accurate. The policy section will be reissued.
 - *Minor revisions are required—contact information, department names, referenced policy section names have changed, but the basic content of the policy statements and procedures is still accurate.*
Very minor changes can be submitted via email, or you can request the electronic file for the policy section to key your tracked changes. The Policy and Communications unit will determine if the policy section requires formal review prior to final approval.
 - *Major revisions are required—the policy and/or procedures are outdated or out of compliance.*
Determine your target date for submission of the draft for review. Request the electronic file for the policy section to key your tracked changes. Consult with the Policy and Communications unit as needed to assist with content, structure, and organization.
 - *Delete from manual—this policy section is no longer required.*
You must provide a statement describing the reason why the section is to be deleted, and where departments can go to get information on the current procedure.
- Notify your unit policy coordinator of the status of each policy section. Your unit policy coordinator will forward all reports to the Policy and Communications unit.