# Policy Writer's Checklist

*Updating your policy sections and exhibits:*

☐ Request the most recent word processing file from your unit policy coordinator (see http://manuals.ucdavis.edu/resources/coordinators.htm). 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.

☐ 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 appropriate.

☐ When reviewing your procedures, focus on being clear and succinct. Use plain language. 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 and the Campus Policy Coordinator 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:*

☐ Before starting development, complete the *New Policy Development Plan* and submit to your unit policy coordinator. If the plan is approved, you will be notified of the policy number assigned by the Administrative Policy Office.

☐ Download the policy template from http://manuals.ucdavis.edu/Resources.htm.

☐ Complete the general information at the top of the policy section template, including the department responsible for the policy, and the law or systemwide policy that is the source for the campus policy when applicable.

☐ Refer to the *Development and Management of Campus Administrative Policies* and *Guide to Writing Policy* for guidelines regarding the standard structure for policy sections.

☐ Consult with the Campus Policy Coordinator regularly during development and consultation.

*Submitting drafts for formal review:*

☐ Submit the electronic draft to your unit policy coordinator along with the following information:

　　o A brief summary of the revision.

　　o The names and departments of people who have been consulted on the update or development of the policy section.

　　o 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, checking all links, references, and structure, make any additional corrections that are necessary, and submit the draft to the Administrative Policy unit.

☐ The Administrative Policy unit will review the policy section, making editorial and structural changes needed for clarity. You will be contacted regarding any questions on the content of the policy.

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*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 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.

*Update lists (monthly/as needed):*

☐ Review the sections listed on the update list for which you are identified as the policy developer.*

☐ Indicate a target date for completion of the update.

☐ Determine which of the following actions is required for each policy section:

   o *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.

   o *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; no substantive changes.*
   Request the electronic file for the policy section from your unit policy coordinator and key your tracked changes. The Administrative Policy Office will determine if the policy section requires formal review prior to final approval.

   o *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 Administrative Policy Office as needed to assist with content, structure, and organization.

   o *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 (if applicable).

☐ Indicate the risk level to be associated with the policy (high, medium, low) based on assessment of legal, financial, or reputational risks of non-compliance.

☐ Notify your unit policy coordinator of the status of each policy section.


* If you are no longer the policy developer for a specific policy, or you are misidentified as the policy developer, contact your Unit Policy Coordinator. If known, provide the name of the correct policy developer.