



Sacramento State University Policy Manual

Guidelines for Adding, Updating, and Removing Administrative Policies

Policy Definition:

Policies are principles (or sets of principles) intended to govern actions.

Procedures Definition:

Procedures are the actions taken to implement or carry out a policy.

Guidelines Definition:

Guidelines are documents that advise how a process *should* be completed

University Policy Manual Website:

<http://www.csus.edu/um anual/>

University-wide administrative policies, procedures, and guidelines are maintained in the Office of the Vice President for Administration/CFO. This guide is intended to serve as a resource for Divisions that need to add a policy to the University Policy Manual or to update a currently posted policy, or to remove a posted policy. Division, department, college policies, procedures, and guidelines specific to these areas are not posted in the University Policy Manual.

University Policy Reviews

The purpose of the University Policy Manual review is to ensure that each policy:

- ✓ is applicable and has not been superseded
- ✓ is by definition a policy rather than a procedure
- ✓ contains up-to-date information
- ✓ includes information outlined in the Policy Format Guidelines
- ✓ is approved by the President.

Proposed new policies and current policies administered by your division must be reviewed to determine if it is a policy, a procedure, or a combination of the two, using the following definitions as a guideline:

- Policies are principles intended to govern actions
- Procedures are the actions taken to implement or carry out a policy.

Proposed New Policies that Require Approval

For new policies that are not currently published in University Policy Manual

Review the process flow chart which outlines the process for adding a new policy to the University Policy Manual:

<http://www.csus.edu/um anual/updatePolicy.html>

1. Inform University Policy Coordinator of proposed new policy
 - Request policy file number from Coordinator.
2. Prepare policy verbiage and ensure proper policy template is used
3. If procedures or guidelines are identified within the policy, ensure the procedures/guidelines are posted in a separate document. This document shall be posted on the Division (or department/unit requesting the new policy) website.
 - The URL linking to the procedure/guideline must be submitted as part of the policy document packet to the University Policy Coordinator.

4. The completed administrative policy and associated documents will be forwarded to the President for approval via the Vice President for Administration/CFO. Once the policy is approved by the President, the Policy Coordinator will post the policy to the University Policy Manual and will inform the requesting Division of the approval. No policy will be posted until the President's signed copy is received. *Please note that Curriculum/Academic policies follow a different process via the Provost's Office.*

Current University Policies that Require Updates

For documents identified as a Policy:

Review current policy and determine if it requires minor changes or is satisfactory as is, or if it is outdated and/or requires content revision. Minor changes include:

- Replacement of proper names with position titles
- Correction of position titles and department names
- Removal of references to specific room numbers, phone numbers, buildings, etc.
- Usage of the University name correctly per the University's Identity Style Guide
- Inclusion or deletion of obsolete policy cross-references or authority references as appropriate

For policies needing minor changes or are satisfactory as is:

1. Policy should be updated and re-drafted by the responsible division using the appropriate style format (see Policy Template and Policy Format Guidelines).
2. Each policy will be reviewed to assess if a new policy number is required. If the current Policy number starts with a "U" (e.g., UMA00300, or UMD3350), a new policy number needs to be assigned. The "U" is an indication that the policy was drafted under outdated policy guidelines. The new policy number will be assigned by the University Policy Manual Coordinator in the Office of the Vice President for Administration/CFO and given to the divisional policy contact to include in the re-drafted policy.
3. The completed administrative policy and associated documents will be forwarded to the President for approval via the Vice President for Administration/CFO. Once the policy is approved by the President, the Policy Coordinator will post the policy to the University Policy Manual and will inform the requesting Division of the approval. No policy will be posted until the President's signed copy is received. *Please note that Curriculum/Academic policies follow a different process via the Provost's Office.*

For documents identified as a Policy that need to be rewritten or have new/updated information added:

1. Refer to the Policy Format Guidelines to ensure that all relevant information is included in the policy document.
2. If the policy involves issues that could be subject to bargaining (wages, working conditions, or if policy violation could lead to disciplinary action), the draft should be reviewed by Human Resources prior to finalizing to determine if it is subject to the Meet and Confer process.

3. Policy changes and/or additions should be reviewed or made in collaboration with appropriate campus constituents and affected departments.
4. Policy should be updated and re-drafted by the responsible division using the appropriate style format (see Policy Template and Policy Format Guidelines).
5. Each policy will be reviewed to assess if a new policy number is required. If the current Policy number starts with a "U" (e.g., UMA00300, or UMD3350), a new policy number needs to be assigned. The "U" is an indication that the policy was drafted under outdated policy guidelines. The new policy number will be assigned by the University Policy Manual Coordinator in the Office of the Vice President for Administration/CFO and given to the divisional policy contact to include in the re-drafted policy.
6. The completed administrative policy and associated documents will be forwarded to the President for approval via the Vice President for Administration/CFO. Once the policy is approved by the President, the Policy Coordinator will post the policy to the University Policy Manual and will inform the requesting Division of the approval. No policy will be posted until the President's signed copy is received. Please note that Curriculum/Academic policies follow a different process via the Provost's Office.

For posted procedures in the University Policy Manual previously identified as a Policy (based on new policy guidelines):

1. Prepare a recommendation to the President for procedures to be removed from the University Policy Manual. Include information as to whether the procedure is still applicable, and if so, identify the appropriate department web page where the procedure will be linked.
2. The recommendation to remove an administrative policy will be vetted through the Office of the Vice President/CFO prior to the President's review. The Policy Coordinator will forward the removal recommendation to the President's Office.
3. The approved (signed) recommendation by the President will be forwarded to the University Policy Manual Coordinator who will remove the procedures from the University Policy Manual. No procedure will be removed until the approved recommendation has been received. Divisions will be responsible for posting procedures to their respective web pages (if applicable).

For documents identified as a Policy and Procedure combined:

1. Separate the policy and procedure into two documents.
2. Policy should be updated and re-drafted by the responsible division using the appropriate style format (see Policy Template and Policy Format Guidelines).
3. Each policy will be reviewed to assess if a new policy number is required. If the current Policy number starts with a "U" (e.g., UMA00300, or UMD3350), a new policy number needs to be assigned. The "U" is an indication that the policy was drafted under outdated policy guidelines. The new policy number will be assigned by the University Policy Manual Coordinator in the Office of the Vice President for Administration/CFO and given to the divisional policy contact to include in the re-drafted policy.

4. Update the procedure as needed, save as a PDF, and post the procedure within the Division or Department webpage. Include the URL to the procedure at the end of the policy document. Ensure that the responsible division/department provides the URL to the University Policy Manual Coordinator so the procedures are actively linked within the policy within the University Policy Manual.

For policies that are superseded or no longer needed:

1. Prepare a recommendation to the President for policies to be removed from the University Policy Manual for approval. Review by Legal Counsel may also be recommended depending on policy content.
2. The recommendation to remove an administrative policy will be vetted through the Office of the Vice President/CFO prior to the President's review. The Policy Coordinator will forward the removal recommendation to the President's Office.
3. Once the President signs and approves the removal of the University Policy, the Policy Coordinator will remove the policy from the University Policy Manual. No policy will be removed until the approved recommendation by the President has been received.