GUIDANCE FOR POLICY OWNERS

Procedure

1. For each item you are reviewing, submit a cover sheet using the template provided. Name the document in the following format: "[year][policy number] cover."
   Examples: 2024 FSH 3500 cover, 2025 APM 70.02 cover

2. Review the item using the information in the section titled "Guidance," below.

   a. **If the item needs revision:**

      i. Use "track changes" and do not accept changes during the revision process. It is essential for legal purposes to maintain an accurate history of all changes to the policy library.

      ii. As a part of your revision, reformat the policy to conform to the policy template provided. Purpose, Scope, and Related Policies (if applicable) sections are required.

      iii. Name the revision file in the following format: "[year][policy number] redline." Examples: 2024 FSH 3500 redline, 2025 APM 70.02 cover.

      iv. Indicate on the cover sheet that comprehensive review was conducted and describe the changes made.

   b. **If the item does not need revision,** submit only the cover sheet indicating that comprehensive review was conducted and no changes were needed.

Guidance

In reviewing your policy, consider each of the following:

1. Does this policy still align with other associated policies and procedures and with higher governing authority (SBOE policy, federal/state/local laws and regulations, accreditation requirements, etc.)?

2. How do you assess compliance with this policy?

3. Are there audit findings to consider?

4. Does this policy have known points of failure? What improvements would help mitigate them?

5. How does the policy compare with similar policies at other institutions?

6. What common questions have been asked since the past review? Do the questions indicate that certain sections of the policy might need clarification?

7. Examine the policy with an eye toward ethnicity, race, religious expression, veteran status, age, socio-economic status, people with both apparent and non-apparent disabilities, gender identity and expression, sexual orientation, and indigenous populations, as well as location at UI operations around the state.

    a. Are there any barriers to compliance or disparate impacts? If so, consult with those affected about how the problem can be mitigated.

    b. Use gender-inclusive pronouns or reword to avoid use of exclusionary language.

8. Are any changes needed to accommodate remote work or participation?

9. Are titles, authority, unit names, etc. correct?

10. Are all cross-references to other policies or procedures correct? Have you revised the policy such that references to it in other policies or procedures will need to be changed? Can any cross-references be eliminated?

11. Remove external links whenever possible, because they inevitably lead to broken links.

12. Do associated forms need to be updated?

13. Are the procedures still correct?

14. Who are the other stakeholders who should be consulted in reviewing the policy?