Policy/Procedure Writer's Checklist

Updating your policy or procedure:

- □ Request the most recent MS Word file from the Compliance Office.
- □ Utilize the "Track Changes" feature in MS Word to ensure other reviewers and approvers can identify all changes that are made.
- □ Keep in mind the purpose of the policy. Think specifically about what information individuals and College departments will need in order to understand, use and adhere to the policy and complete their work efficiently.
- □ When reviewing your policies and 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 to the least number of pages necessary to keep it as user-friendly as possible. Policies can sometimes be divided into two or more smaller policies or reference other policies as needed 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 Compliance Office so they are alerted to the potential change. Be aware of the possible impact that your policy changes could have on individuals and departments and on other policies.
- □ Check all information, including department names and position titles, in your policy to ensure continued accuracy.

Writing new policy or procedure:

- □ Download the policy template.
- □ Refer to the *Guide to Writing and Updating College Policies* for guidance on drafting an effective policy.
- □ Consult with campus stakeholders regularly during the development of the policy.

Procedures for Approval:

- □ Refer to the *Governance Document* and *Policy Framework* and consult with the cabinet office overseeing the responsible unit to determine necessary approval based on the type of policy developed.
- □ When a policy is approved, provide a final copy to the Compliance Office for inclusion in the College's On-line Policy Manual and check the On-line Policy Manual to confirm that it is included (allow one week for posting).

Procedures for Annual Review:

- ☐ Identify those policies for which you are the Responsible Unit that are up for review. (*Note: The Policy Framework requires that each policy be reviewed not less than once every five years.*)

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

  No changes required – If all policy statements, content, contact information, references, links, etc. are accurate and there are no changes in applicable law that require changes in the policy, then the policy can be reissued as is.

  Minor revisions are required – If department names or referenced policy names have changed, but the basic content of the policy is still accurate; no substantive changes are required, but you can request that the Compliance Office make the non-substantive updates in accordance with the Policy Framework.

  Major revisions are required – If the policy is outdated or out of compliance.

  Obsolete – If the policy is no longer needed, you (with the Approver) can request that it be removed from the On-line Policy Manual. Be sure to also request the removal of references or links to the policy in other policies.

- ☐ Refer to guidelines on updating your policy.