

# UW System Administrative Policy Orientation Guide

The University of Wisconsin (UW) [System Administrative \(SYS\) Policy series](#) is a comprehensive set of policies that apply to the Universities of Wisconsin (except for policies in the 1200 series which do not apply to UW-Madison). These policies utilize consistent formatting and templates, as well as a standard review practice to ensure that key stakeholders can provide feedback on new policies before they are implemented. The Office of Strategic Initiatives oversees the drafting and revision of SYS policies, procedures, and guidance and manages communications to stakeholders regarding policy changes.

This document describes the different policy practices of UW System Administration (UWSA), including the rationale for and types of policy drafting/revisions, the committee organized to review draft documents, the feedback and approval processes, and the annual policy prioritization process.

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## POLICIES, PROCEDURES, AND GUIDANCE

The SYS policy series includes three types of documents with different levels of authority. All utilize standard templates and review processes. A more detailed description of the document types is as follows:

**Policy:** The UW System Administrative policy set falls into two general areas:

1. Academic and Student Affairs Policies
2. Finance and General Administration Policies

In both categories, policies are developed to establish standards to comply with applicable laws, regulations, and Regent Policy Documents. Policies apply universally to all UW institutions, except policies in the 1200 series which apply to all institutions except UW-Madison. Policies are designed to promote efficiency, reduce risk, and/or enhance operational objectives of the Universities of Wisconsin.

**Procedure:** Procedure documents list action steps required to implement and comply with SYS Policies. They may include specific instructions and forms to assist in complying with the policy they support.

**Guidance:** Guidance documents support policies by providing best practices or advice on interpreting or complying with a policy. They do not contain any mandatory requirements except where requirements found in Statute, Administrative Rule, or other external policies are referenced.

## POLICIES ON POLICY DEVELOPMENT

All development of system administrative (SYS) policies is governed by the provisions of [SYS 1, Development, Revision, and Approval of UW System Administrative Policies, Procedures, & Guidelines](#), which promotes consistency in formatting, timely updates, and communication practices across the policy set.

The process for development, revision, review and approval of policies, procedures, and guidance is further specified in procedure [SYS 1.A, UW System Administrative Policy, Procedure & Guidance Development, Review, and Approval Process](#). To aid in their work on UW System Administrative policies, procedures, and guidance, SYS 1 Guidance: Guidance for the Development and Review of UW System Administrative Policies, Procedures, and Guidance, provides best practices for policy owners on drafting, consultation and review, finalization and approval, and publication and notification of approved policies, procedures, and guidance.

## REASONS FOR POLICY DEVELOPMENT, REVIEW, AND REVISION

There are many reasons for policies, procedures, or guidance to be considered for development or revision, including:

- New external regulations that necessitate the drafting of a SYS policy to enact requirements;
- Changes to external regulations that conflict with current policy;
- Changes to internal processes that do not reflect content of current policy;
- Scheduled review date triggers the review and reconsideration of the policy content.

Sometimes these needs can be anticipated in advance and are included in the Annual Policy Prioritization Plan that is drafted by the Office of Strategic Initiatives with input from university stakeholders, policy owners and UWSA leadership. This plan helps stakeholders to anticipate the distribution of the burden of policies to review in the coming year and is utilized to guide the Office of Strategic Initiatives' work, though emerging priorities also come up throughout the year. The plan is finalized and distributed to campuses in late June, just prior to the start of the new fiscal year.

For a more detailed timeline of the prioritization process, see [Appendix A- Annual Policy Prioritization and Policy Priorities Plan](#).

## TYPES OF POLICY REVISIONS

The Office of Administrative Policies distinguishes between three different types of policy/procedure/guidance revisions.

- **Substantive:** Amendments to policies, procedures, or guidance that change the meaning or intention of the document. Substantive revisions go to the UWSA Policy Committee (UWSAPC) and institutions for review before being routed for signature and approval.
- **Technical:** Amendments to policies, procedures, or guidance that do not provide substantial change to the content or meaning of the document. Examples of technical amendments include, but are not limited to, updates to formatting, updates to contact information, changes in office names, cross-references to additional information, and rate changes. Technical revisions are sent to the UWSAPC for review but do not go to the institutions before being routed for signature and approval.
- **Typographical:** Amendments to policies, procedures, or guidance that correct typos in the document (spelling errors or capitalization errors) or fix broken hyperlinks. Typographical revisions do not require review or re-approval.

## RESOURCES FOR ADMINISTRATIVE POLICY OWNERS AND RESPONSIBLE OFFICERS

The [Resources for Administrative Policy Owners and Responsible Officers](#) page contains links to templates and the UW System Administrative Policies: Glossary and Style Book to assist in policy writing and encourage formatting consistency in the SYS Policy series.

## REQUIRED DOCUMENTS FOR POLICY REVIEW

If you have a policy/procedure/guidance to be included in the policy distribution cycle, provide the Office of Strategic Initiatives with the following documents (templates available on the [Resources for Administrative Policy Owners and Responsible Officers](#) webpage):

- Clean proposed document
- Tracked changes document from previous version (not used for new policies)
- Policy summary document
- Policy Drafting Checklist

## POLICY REVIEW COMMITTEE

The UWSAPC is responsible for the approval, revision, and regular review of UW System Administrative policies, procedures, and guidance. The committee meets monthly and consists of two subcommittees: the Finance and General Administrative Policy Committee (FGAPC) and the Academic and Student Affairs Policy Committee (ASAPC). The FGAPC is chaired by the Office of the Vice President for Finance and Administration and consists of at least one (1) representative from the following offices: Academic and Student Affairs, Board of Regents, Compliance & Risk Management, Capital Planning & Budget, General Counsel, Human Resources, Information Security, and Learning and Information Technology Services, University Relations, and Budget and Planning, Financial Administration and Procurement Strategic Sourcing workgroups in the Office of Finance. Committee members help to draft policies from their business areas and perform initial reviews of Finance and General Administrative policy, procedure, and guidance drafts. They also participate in other aspects of the policy review process and consult on initiatives from the Office of Strategic Initiatives.

The ASAPC is composed of one representative from each of the following offices: Vice President for Academic and Student Affairs (whose representative chairs the committee), Vice President for Finance and Administration, Policy Analysis and Research, Academic Affairs, Enrollment & Student Success, and Online & Professional Learning Resources. This committee reviews drafts of Academic and Student Affairs

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policies, procedures, and guidance documents at their monthly meetings before including the drafts in the university distribution.

## **POLICY REVIEW PROCESS**

Newly drafted or substantively revised policies, procedures, and guidance documents are first reviewed by the policy committee and UW System President and leadership team. Draft policies are sent out on the first Monday of the month and committee members have two weeks to provide their feedback.

Draft policies are then sent out to representatives from the universities for review and comment. University Distributions are always sent to Chancellors, Provosts, Chief Business Officers, Senior Student Affairs Officers, Senior Strategic Enrollment Officers, Chief Compliance Officers, as well as a list of individuals identified by their university's leadership who receive all policy communications and the statewide Shared Governance Council representatives. Other groups (such as Chief Human Resource Officers or Chief Information Officers) are also included in the distribution for comment depending on the subject matter of the policies for review. These distributions are generally sent on the third Friday of the month, with a reminder message sent two (2) weeks later.

For a complete look at the monthly policy review processes, see [Appendix B- UWSA Policy Committees Review Cadence](#).

## **POLICY APPROVAL**

Once a policy owner has determined that a policy, procedure, or guidance document is ready for finalization and that all comments have been considered, the final documents (including the clean copy, tracked changes document, policy summary, and policy drafting checklist) are sent to the Office of Strategic Initiatives for a final review. The Office of Strategic Initiatives then utilizes DocuSign to obtain the necessary signatures for a policy, procedure, or guidance document to be approved.

**Policies:** SYS Policies are reviewed by the Division of Finance and Administration (DFA) Policy Analyst, the Associate Vice President or Director over the policy subject area, and the responsible System Vice President. They are then approved by the System President.

**Procedures:** SYS Procedures are reviewed by the DFA Policy Analyst, and the Associate Vice President or Director over the policy subject area and are then approved by the responsible System Vice President.

**Guidance:** SYS Guidelines are reviewed by the DFA Policy Analyst and the UWSA General Counsel. They are then approved by the responsible Associate Vice President or Director over the policy subject area.

After all necessary signatures have been obtained in DocuSign, the Office of Strategic Initiatives updates [the UW System Administrative Policies & Procedures](#) webpage with the new content.

The Office of Strategic Initiatives then includes a notice of the approval in the next regularly scheduled University Distribution message. A newsfeed story is also posted on the [UW System Administrative Policies & Procedures](#) website, following the university distribution.

## **SCHEDULED REVIEW DATE PRACTICES**

All new and recently revised SYS policies have a scheduled review date that prompts the policy owner to re-evaluate the policy's content to ensure it is still up-to-date and accurate. The standard review period is five (5) years after the most recent revision.

During the Policy Prioritization Process, the Office of Strategic Initiatives sends the policy owners a list of all policies in their series with a scheduled review date in the upcoming fiscal year. Policy owners should look over this list and determine if the policy requires substantive revisions or if the content of the policy is still current. (At this point the policy owner should also look at any associated procedure or guidance documents to ensure alignment with the policy and current practices.)

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If no content revisions need to be made, the Office of Strategic Initiatives will work with the policy owner to process a technical revision that changes the scheduled review date to inform readers that the policy has been reviewed and is still up to date.

If substantive revisions are required, the policy should be included in the Policy Priorities memo. No later than the month before the scheduled review date, the new clean version, tracked changes document, policy summary, and policy drafting checklist should be submitted to the Office of Strategic Initiatives for distribution to ensure time for review and approval before the scheduled review date.

## **INTERIM POLICY ACTIONS**

Interim Policy Actions have a faster review cadence and are reserved for addressing high level concerns that require a policy be in place sooner that would be allowed by the full SYS policy review process, or temporarily amending/waiving provisions of an existing policy. The implementation of interim policy actions is governed by [SYS 1, Development, Revision, and Approval of UW System Administrative Policies, Procedures, & Guidance](#).

Interim Policy Actions are drafted by policy owners/subject matter experts. Following the drafting of the interim action, the policy is reviewed and approved via DocuSign by the DFA policy analyst, relevant Associate Vice President, relevant Vice President, and the UW System President. Following this approval, Office of Strategic Initiatives updates the [UW System Administrative Policies & Procedures webpage](#) with the new content. Interim Policy Actions have an expiration date, which is no longer than one year after the action is approved. The action may be extended under extraordinary circumstances. If revisions need to be made to the action prior to its expiration, the revisions follow the same approval process as the original Interim Policy Action and require a summary document describing the revisions.

## **APPENDIX A - ANNUAL POLICY PRIORITIZATION AND POLICY PRIORITIES PLAN TIMELINE**

**University Recommendations (February-April):** The annual policy prioritization process begins in February with a request for campus leadership to provide feedback on up to five (5) policies per campus they believe should be drafted, revised, or rescinded in the upcoming fiscal year. The four systemwide Shared Governance groups (Academic Staff, Faculty, University Staff, and Student Government Representatives) are also offered the ability to provide up to five (5) policy priority proposals. The DFA policy analyst will reach out in January to each of the Shared Governance Statewide Representative Councils to schedule a meeting to explain the process and provide a timeline. Feedback from the Shared Governance groups must be consolidated and submitted by the chair of each Systemwide Representative Council.

**Policy Owner Priorities (May):** The Office of Strategic Initiatives compiles this feedback and sorts it by policy series. These recommendations, in addition to the list of policies with scheduled review dates in the upcoming fiscal year, are then provided to the relevant policy owner to discuss with their team. Policy owners are given three (3) weeks to consider the feedback and develop their comprehensive list of policy priorities (including new policies, policy revisions, and policy rescissions) with the quarter that they would like to target for distributing the policy (if known). Each policy owner provides their list of priorities to the Office of Strategic Initiatives. Policy owners take the recommendations from university stakeholders into consideration but ultimately may not include all university recommendations in their list as they must work within the constraints of required policy work and time/workload limitations. If policy recommendations are not included in the list, policy owners should provide a brief rationale for why the work is not being undertaken. The DFA policy analyst will provide this explanation to the commenters around the time of the memo's distribution.

The Office of Strategic Initiatives reviews the priorities for all policy series and compiles them into one comprehensive memorandum from the UW System Vice Presidents and the Chancellors, Provosts, Chief Business Officers, Senior Student Affairs Officers, Senior Strategic Enrollment Officers, and Compliance Officers.

**Leadership Review (June):** The UW System President, Vice Presidents, General Counsel, and Chief Audit Officer are provided a copy of the draft memorandum to review and ensure they agree with the listed priorities.

**Vice President Signature (June):** The Office of Strategic Initiatives loads the final memorandum into DocuSign for signature by the UWSA Vice Presidents.

**Policy Priorities Plan Distribution (end of June):** The Office of Strategic Initiatives distributes the Policy Priorities Plan to universities prior to the beginning of the new fiscal year to inform campuses of the anticipated policy work in the coming year so they can plan and begin resource allocation.

**Quarterly Policy Priorities Updates:** Throughout the year, quarterly memoranda from the DFA Policy Analyst to the UW System Vice Presidents are shared with the institutions to track progress against this plan.

## APPENDIX B - UWSA POLICY COMMITTEES REVIEW CADENCE

The following table contains the key UWSAPC dates and deadlines for the current calendar year. A detailed description of each step can be found below.

Distribution Month	Deadline to Request Assistance with Draft Policy Documents*	Deadline to Submit Draft Policy Documents*	Date of UWSAPC Distribution	Deadline for UWSAPC Review	UWSAPC Meeting	Date of University Distribution	Deadline for University Review (3 weeks)
December	Nov. 21, 2025	Nov. 28, 2025	Dec. 1, 2025	Dec. 15, 2025	Dec. 17, 2025	Dec. 19, 2025	Jan 9, 2026
January	Dec. 26, 2025	Jan. 2, 2026	Jan. 5, 2026	Jan. 20, 2026	Jan. 21, 2026	Jan. 23, 2026	Feb. 13, 2026
February	Jan. 23, 2026	Jan. 30, 2026	Feb. 2, 2026	Feb. 16, 2026	Feb. 18, 2026	Feb. 20, 2026	Mar. 13, 2026
March	Feb. 20, 2026	Feb. 27, 2026	Mar. 2, 2026	Mar. 16, 2026	Mar. 18, 2026	Mar. 20, 2026	Apr. 10, 2026
April	Mar. 27, 2026	Apr. 3, 2026	Apr. 6, 2026	Apr. 20, 2026	Apr. 22, 2026	Apr. 24, 2026	May 15, 2026
May	Apr. 24, 2026	May 1, 2026	May 4, 2026	May 18, 2026	May 20, 2026	May 22, 2026	Jun. 12, 2026
June	May 22, 2026	May 29, 2026	June 1, 2026	June 15, 2026	June 17, 2026	June 19, 2026	July 10, 2026
July	June 26, 2026	July 3, 2026*	July 6, 2026	July 20, 2026	July 22, 2026	July 24, 2026	Aug. 14, 2026
August	July 24, 2026	July 31, 2026	Aug. 3, 2026	Aug. 17, 2026	Aug. 19, 2026	Aug. 21, 2026	Sep. 11, 2026
September	Aug. 28, 2026	Sep. 4, 2026	Sep. 8, 2026	Sep. 21, 2026	Sep. 23, 2026	Sep. 25, 2026	Oct. 16, 2026
October	Sep. 25, 2026	Oct. 2, 2026	Oct. 5, 2026	Oct. 19, 2026	Oct. 21, 2026	Oct. 23, 2026	Nov. 13, 2026
November	Oct. 23, 2026	Oct. 30, 2026	Nov. 2, 2026	Nov. 16, 2026	Nov. 18, 2026	Nov. 20, 2026	Dec. 11, 2026
December	Nov. 20, 2026	Nov 27, 2026	Nov 30, 2026	Dec 14, 2026	Dec. 16, 2026	Dec. 18, 2026	Jan. 8, 2026
January	Dec. 23, 2026	Dec 30, 2026	Jan. 4, 2027	Jan. 25, 2027	Jan. 27, 2027	Jan. 29, 2027	Feb. 19, 2027

\*three (3) weeks is the standard distribution period for policies in the 200-1200 Series. Policies in the 100 Series are distributed for 30-60 days, depending on the policy and the nature of the revisions.

### DEADLINE TO REQUEST ASSISTANCE WITH DRAFT POLICY DOCUMENTS

- If committee members need assistance drafting the documents required for policy review, they inform the Office of Strategic Initiatives.

### DEADLINE TO SUBMIT DRAFT POLICY DOCUMENTS—ONE (1) WEEK LATER

- Committee members send policy review documents for every policy being distributed that month to the Office of Strategic Initiatives.

### UWSAPC DISTRIBUTION—FOLLOWING MONDAY

- The Office of Strategic Initiatives sends committee members links to, and summaries of all policies, procedures, and guidance being considered that month. This email and the associated Word Documents are also sent to the President's Office for simultaneous review.

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- Committee members have two (2) weeks to review the included policies with the specific lens of how the policy or policy revisions would interact with policies and practices in their area.

#### **DEADLINE FOR UWSAPC REVIEW—TWO (2) WEEKS LATER**

- The next working day after the deadline, the Office of Strategic Initiatives provides policy owners with policies in the distribution with the committee's feedback. Policy Owners have four (4) days to make any revisions before the policy is sent to universities for comment.

#### **UWSAPC MEETING—TWO (2) DAYS AFTER FEEDBACK IS DUE**

- The committee meets to discuss the progress of policies in the administrative policy review cycle. FGAPC subcommittee members join for the first half hour. Both subcommittees attend for the second half hour. ASAPC members stay for the last half hour. Discussion includes:
  - First 30 minutes (FGAPC only):
    - Policies from that month's distribution related to Finance and General Administration (opportunity for policy owners to ask questions of commenters if they have any concerns about the feedback provided);
    - Policies that have already been distributed to the institutions for feedback (policy owners provide an update on final revisions being considered to address feedback and an estimate of when the policy will be ready for final signatures and approval);
    - Policies from the policy priorities plan slated for review and consideration in the current quarter (policy owners provide an estimate of the month that they anticipate the policy being included in the distribution cycle, as well as any Regent Policy Documents they are currently drafting);
  - Second 30 minutes (both committees):
    - Other administrative items (report from the Office of Strategic Initiatives about proposed enhancements to the policy process or initiatives such as scheduling the next year's committee meetings and the annual policy prioritization process); and
    - A review of key dates in the policy distribution cycle for the upcoming three months;
  - Third 30 minutes (ASAPC only):
    - A detailed review of draft ASAPC policies (discussion of current draft language and implications, updates on policy workgroups and taskforces, and mapping out of next steps for policy drafting work).

#### **POLICY REVISIONS BASED ON INTERNAL REVIEW DUE—ONE (1) DAY AFTER UWSAPC MEETING**

- If policy owners would like to revise the draft policy, procedure, or guidance distributed to the UWSAPC based on committee feedback, they must send revised documents to the Office of Strategic Initiatives for inclusion in the university distribution.

#### **UNIVERSITY DISTRIBUTION—FRIDAY AFTER THE UWSAPC MEETING**

- University representatives (Chancellors, Provosts, CBOs, SSAOs, SSEOs, Compliance Officers, Shared Governance representatives, individuals identified by campus leadership, and other groups relevant to the content of distributed policies such as CIOs or CHROS) are sent an email with links to and a brief summary of all policies, procedures, and guidance being considered that month. This message also may include notice of approved policies, notice of upcoming policy effective dates, notice of upcoming interim policy action expirations, monthly summaries of policy work completed, and quarterly memos of policy worked expected in the upcoming quarter.
- The length of the university comment period varies based on the policy content and number of policies in the distribution. The standard period for Finance and General Administrative policies is three (3) weeks, unless discussed with the policy owner. The standard period for Division of Academic and Student Affairs policies is 60 days. The date and time on which feedback is due will be listed under the list of policies, procedures, and guidance being considered that month.
- A distribution reminder will be sent out the week before feedback is due. The reminder contains the same information as the original distribution but may contain additional notices.

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**DEADLINE FOR UNIVERSITY REVIEW—THREE (3) WEEKS AFTER ORIGINAL DISTRIBUTION FOR FGAPC; 30-60 DAYS AFTER DISTRIBUTION FOR ASAPC**

- Policy owners with policies in the distribution are provided with the universities' feedback. Policy owners are encouraged to review the feedback with their teams and utilize the fields in the feedback form to internally respond to the feedback and make any necessary revisions. University comments and concerns, along with the response from the policy owner, must be included in the final policy summary document.
- The policy analyst may also individually follow up with commenters, providing them with a response from the policy owner regarding their comment. This follow up would occur prior to a notice of approval being sent out.
- Policy owners provide updates to the UWSAPC in subsequent monthly meetings until the policy is approved.