

Preparing the Policy Document

The policy document serves as the vehicle for communicating the policy to relevant stakeholders and contains the following: (1) purpose, (2) definitions, (3) policy statement, (4) procedures that explain its implementation and operation, (5) stakeholders, and (6) when applicable, additional information.

1. The Header Box

- Governing Body: Federal, State, Bargaining Unit, etc.
- Policy Contact: Title of person who is first point of contact for advice on interpretation and application of the policy.
- Custodial Office: The primary office responsible for the function addressed by the policy.
- Approved By: President or vice president or a designee of either; Governing entity.
- Related Policies: Documents such as Oregon Revised Statutes or Oregon rules that are the foundation for the SOU policy.
- Policy Number: Identifying letters and number assigned by the SOU Policy Council
- Date Revised: Date of last revision which may also be the most recent effective date.
- Date Approved: Original approval date. This date does not change with subsequent revisions. It serves as the policy creation date and the beginning date of its historical record.
- Next Review: For new policies, three (3) years after the approved date; for existing policies, three (3) years after the revised date.
- Revision History: A brief description of changes to the policy by date.

2. Policy Elements

- Purpose: States the need for the policy. Keep it brief—a short paragraph or a sentence.
- Definitions: Identifies or clarifies important and/or unfamiliar terms.
- Policy Statement: States key points; explains how policy is to be implemented; identifies responsible authorities; identifies exceptions to the policy; describes disciplinary action when appropriate. The last paragraph of the policy is always this statement: “This policy may be revised at any time without prior notice. All revisions supersede prior policy and are effective immediately upon approval.”
- Policy Consultation: Identifies those who must be notified of the policy or change, or will be affected by this policy.
- Other Information: Provides any other information important in the development, evaluation, revision and implementation of this policy. Procedures related to this policy are maintained and will be made accessible by the Custodial Office as defined in this policy.