# Policy and Procedure Review Process Step-By-Step Outline:

This outline has been written to provide guidance on the details involved in reviewing, revising, and retiring policies and procedures at Clover Park Technical College. It does not usurp the College’s Policy and Procedure, but instead provides detailed guidance on the steps involved.

This process is important to ensure we provide opportunities for input into decisions that impact faculty and staff broadly.

## Creating a NEW Emergency Policy or Procedure Process (Rev. 6/2020)

1. In the event of an emergent situation which necessitates a swift policy adoption, the President is authorized to implement college policy so long as a follow up review process takes place within 60 days.
2. Download the [Accessible Policy and Procedure template](http://www.cptc.edu/policyprocedure-proposals) from our website.
3. Turn on “track changes.”
4. Make edits/additions to the policy. Remember to insert the reviewed/revised/next review dates. Add a proposed Policy number.
5. Once the policy is ready to go, the Vice President or Executive Team sponsor emails the policy to the E-Team and provides a deadline for feedback/review (should be at least 7 days). VP/E-Team member gathers feedback, makes edits, and once E-Team approves moves to next step.
6. Tracked changes document is emailed to the Web Content Manager, with a request for them to post online.
7. Once you receive a copy of the link where the policy is posted, email All Faculty and Staff with a link to the policy, including notification it has been enacted under the Emergency provision of the process with a review to follow.
8. Within 60 days of the posting on the website, initiate a full review including a forum for feedback. Follow the steps under New Policy or New Procedure to their conclusion.

## Creating a NEW Policy Process:

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2. Turn on “track changes.”
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5. Tracked changes document is emailed to the Web Content Manager, with a request for them to post online. Request should include the date/time/location for a forum (should occur on or about 10 days after the policy is posted). They will post the policy and assign notifications for comments to go to you. Those comments are your responsibility to respond to throughout the posting period.
6. Once you receive a copy of the link where the policy is posted, email All Faculty and Staff that a policy has been posted for their review. Include the date/location/time for the forum.
7. Respond to all comments, consider whether changes should be made or not throughout the 14 days. Host the forum, consider whether any feedback provided warrants revisions.
8. After the review period, email E-Team to share whether any comments warranted change, or if you are recommending approval.
   1. If approved: clean the track changes, print, and send to the President for her signature. Email the clean document to Dustin Annis (AA to the VPSD). Send an email to the Web Content Manager, to take down the proposal and publish the new version. The President’s Office will send the signed version to Dustin Annis who will file, update the tracking list for policies and procedures updates, and then Chris will scan/send to the Web Content Manager for posting on the policy page.
   2. If revised (again): If you change the spirit or intent of what was initially posted, you simply need to repost the revised version for a 7-day comment period. Send an All Faculty and Staff email announcing the re-posting and 7-day review period. Respond to comments. At the end of 7-days repeat Steps 8 and 9a, and then you’re done!

## Policy Revision Process:

1. Email Dustin Annis (AA to VPIE) and ask for the existing Policy and Procedure electronic, Word document.
2. Turn on “track changes.”
3. Make edits/additions to the policy. Remember to update the reviewed/revised/next review dates.
4. Once the policy is ready to go, the Vice President or Executive Team sponsor emails the policy to the E-Team and provides a deadline for feedback/review (should be at least 7 days). VP/E-Team member gathers feedback, makes edits, and once E-Team approves moves to next step.
5. Tracked changes document is emailed to the Web Content Manager, with a request for them to post online. Request should include the date/time/location for a forum (should occur on or about 10 days after the policy is posted). They will post the policy and assign notifications for comments to go to you. Those comments are your responsibility to respond to throughout the posting period.
6. Once you receive a copy of the link where the policy is posted, email All Faculty and Staff that a policy has been posted for their review. Include the date/location/time for the forum.
7. Respond to all comments, consider whether changes should be made or not throughout the 14 days. Host the forum, consider whether any feedback provided warrants revisions.
8. After the review period, email E-Team to share whether any comments warranted change, or if you are recommending approval.
   1. If approved: clean the track changes, print, and send to the President for her signature. Email the clean document to Dustin Annis (AA to the VPIE). Send an email to the Web Content Manager, to take down the proposal and publish the new version. The President’s Office will send the signed version to Dustin Annis who will file, update the tracking list for policies and procedures updates, and then Chris will scan/send to the Web Content Manager for posting on the policy page.
   2. If revised (again): If you change the spirit or intent of what was initially posted, you simply need to repost the revised version for a 7-day comment period. Send an All Faculty and Staff email announcing the re-posting and 7-day review period. Respond to comments. At the end of 7-days repeat Steps 8 and 9a, and then you’re done!

## Policy Review Process:

Policy review means that the responsible Executive Team member reviews the policy and is making no recommended changes that impact the spirit and intent of the policy. For example, updates can be made to titles, phone numbers, and weblinks without changing the spirit or intent. If a policy is reviewed and there are no changes being made that impact the spirit or intent follow this process:

1. Email Dustin Annis (AA to VPIE) and ask for the existing Policy and Procedure electronic, Word document.
2. Remember to update the reviewed/revised/next review dates.
3. The Executive Team sponsor emails the policy to the E-Team and provides a deadline for feedback/review (should be at least 7 days) and a recommendation that the policy be marked as reviewed with no substantive changes. VP/E-Team member gathers feedback and if E-Team approves moves to next step. *If the E-Team determines there are edits necessary that impact the spirit and intent then transition to the Policy Revision Process, step 5.*
4. Once E-Team approves the review, clean the track changes (if necessary), update the new dates, print, and send to the President for her signature. Email the clean document to Dustin Annis (AA to the VPIE). Send an email to the Web Content Manager, to take down the proposal and publish the new version. The President’s Office will send the signed version to Dustin Annis who will file and then scan/send to the Web Content Manager for posting on the policy page.

## Policy Retirement Process:

Policy retirement means that the responsible Executive Team member reviews the policy and is recommending the policy to be retired from our Policies and Procedures. If a policy is being recommended for retirement follow this process:

1. Email Dustin Annis (AA to VPIE) and ask for the existing Policy and Procedure electronic, Word document.
2. The Executive Team sponsor emails the policy to the E-Team and provides a deadline for feedback/review (should be at least 7 days) with a recommendation that the policy be retired and why. VP/E-Team member gathers feedback and if E-Team approves moves to next step. *If the E-Team determines there are edits necessary that impact the spirit and intent then transition to the Policy Revision Process, step 5.*
3. Once E-Team approves the retirement, the Policy document is emailed to the Web Content Manager, with a request for them to post online with proposal to retire it. Request should include the date/time/location for a forum (should occur on or about 10 days after the policy is posted). They will post the policy and assign notifications for comments to go to you. Those comments are your responsibility to respond to throughout the posting period.
4. Once you receive a copy of the link where the policy is posted, email All Faculty and Staff that a policy has been posted for their review and is being recommended for retirement. Include the date/location/time for the forum.
5. Respond to all comments, consider whether changes should be made or not throughout the 14 days. Host the forum, consider whether any feedback provided warrants revisions.
6. After the review period, email E-Team to share whether any comments warranted change, or if you are recommending approval of retirement.
7. If approved: email Dustin Annis (AA to the VPIE) and the Web Content Manager, to take down the proposal and list the policy as retired. Chris will note that retirement in the Policies and Procedures Manual and update the tracking list for policies and procedures updates.
8. If revised: If you decide not to retire the policy and instead revise the current one, you’ll need to go through the policy revision process.

## Creating a NEW Procedure Process:

1. Download the [Accessible Policy and Procedure template](http://www.cptc.edu/policyprocedure-proposals) from our website.
2. Turn on “track changes.”
3. Make edits/additions to the procedure. Remember to insert the reviewed/revised/next review dates.
4. Once the procedure is ready to go, the Vice President or Executive Team sponsor emails the policy to the E-Team and provides a deadline for feedback/review (should be at least 7 days). VP/E-Team member gathers feedback, makes edits, and once E-Team approves moves to next step.
5. Tracked changes document is emailed to the Web Content Manager, with a request for them to post online. They will post the procedure and assign notifications for comments to go to you. Those comments are your responsibility to respond to throughout the posting period.
6. Once you receive a copy of the link where the procedure is posted, email All Faculty and Staff that a procedure has been posted for their review.
7. Respond to all comments, consider whether changes should be made or not throughout the 7 days.
8. After the review period, email E-Team to share whether any comments warranted change, or if you are recommending approval.
   1. If approved: clean the track changes, print, and sign. Send the cleaned and signed document to Dustin Annis (AA to the VPIE). Send an email to the Web Content Manager, to take down the proposal and publish the new version. Dustin Annis will file, update the tracking list for policies and procedures updates, and then Chris will scan/send to the Web Content Manager for posting on the procedure page.
   2. If revised: If you change the spirit or intent of what was initially posted, you simply need to repost the revised version for a 7-day comment period. Send an All Faculty and Staff email announcing the re-posting and 7-day review period. Respond to comments. At the end of 7-days repeat Steps 7 and 8a, and then you’re done!

## Procedure Revision Process:

1. Email Dustin Annis (AA to VPIE) and ask for the existing Procedure electronic, Word document.
2. Turn on “track changes.”
3. Make edits/additions to the procedure. Remember to update the reviewed/revised/next review dates.
4. Once the procedure is ready to go, the Vice President or Executive Team sponsor emails the procedure to the E-Team and provides a deadline for feedback/review (should be at least 7 days). VP/E-Team member gathers feedback, makes edits, and once E-Team approves moves to next step.
5. Tracked changes document is emailed to the Web Content Manager, with a request for them to post online. They will post the procedure and assign notifications for comments to go to you. Those comments are your responsibility to respond to throughout the posting period.
6. Once you receive a copy of the link where the procedure is posted, email All Faculty and Staff that a procedure has been posted for their review. Respond to all comments, consider whether changes should be made or not throughout the 7 days.
7. After the review period, email E-Team to share whether any comments warranted change, or if you are recommending approval.
   1. If approved: clean the track changes, print, and sign. Send the cleaned and signed document to Dustin Annis (AA to the VPIE). Send an email to the Web Content Manager, to take down the proposal and publish the new version. Dustin Annis will file, update the tracking list for policies and procedures updates, and then Chris will scan/send to the Web Content Manager for posting on the procedure page.
   2. If revised (again): If you change the spirit or intent of what was initially posted, you simply need to repost the revised version for a 7-day comment period. Send an All Faculty and Staff email announcing the re-posting and 7-day review period. Respond to comments. At the end of 7-days repeat Steps 7 and 8a, and then you’re done!

## Procedure Review Process:

Procedure review means that the responsible Executive Team member reviews the procedure and is making no recommended changes that impact the spirit and intent of the procedure. For example, updates can be made to titles, phone numbers, and weblinks without changing the spirit or intent. If a procedure is reviewed and there are no changes being made that impact the spirit or intent follow this process:

1. Email Dustin Annis (AA to VPIE) and ask for the existing Procedure electronic, Word document.
2. Remember to update the reviewed/revised/next review dates.
3. The Executive Team sponsor emails the procedure to the E-Team and provides a deadline for feedback/review (should be at least 7 days) and a recommendation that the procedure be marked as reviewed with no substantive changes. VP/E-Team member gathers feedback and if E-Team approves moves to next step. *If the E-Team determines there are edits necessary that impact the spirit and intent then transition to the Procedure* *Revision Process, step 5.*
4. Once E-Team approves the review, update the applicable dates and sign the new procedure. Send the clean document to Dustin Annis (AA to the VPIE) who will update the Policies and Procedures tracking document and file the final version. Chris will send an email to the Web Content Manager, to publish the new version with new dates.

## Procedure Retirement Process:

Procedure retirement means that the responsible Executive Team member reviews the procedure and is recommending the procedure to be retired from our Policies and Procedures. If a procedure is being recommended for retirement follow this process:

1. Email Dustin Annis (AA to VPIE) and ask for the existing Policy and Procedure electronic, Word document.
2. The Executive Team sponsor emails the procedure to the E-Team and provides a deadline for feedback/review (should be at least 7 days) with a recommendation that the procedure be retired and why. VP/E-Team member gathers feedback and if E-Team approves moves to next step. *If the E-Team determines there are edits necessary that impact the spirit and intent then transition to the Procedure Revision Process, step 5.*
3. Once E-Team approves the retirement, the procedure document is emailed to the Web Content Manager, with a request for them to post online with proposal to retire it. They will post the procedure and assign notifications for comments to go to you. Those comments are your responsibility to respond to throughout the posting period.
4. Once you receive a copy of the link where the procedure is posted, email All Faculty and Staff that a procedure has been posted for their review and is being recommended for retirement.
5. Respond to all comments, consider whether changes should be made or not throughout the 14 days.
6. After the review period, email E-Team to share whether any comments warranted change, or if you are recommending approval of retirement.
7. If approved: email Dustin Annis (AA to the VPIE) and the Web Content Manager, to take down the proposal and list the procedure as retired. Chris will note that retirement in the Policies and Procedures Manual and update the tracking list for policies and procedures updates.
8. If revised: If you decide not to retire the procedure and instead revise the current one, you’ll need to go through the procedure revision process.