UW-Madison Policy Terms and Definitions
Revised 9-16-20

Approval Authority
Position or office with the right to issue, approve, or enforce policy. Typically, this authority is
granted by Wisconsin state statute or other foundational document(s), such as, but not limited
to, federal regulations, Board of Regents or UW System Administrative policies, and can be
delegated to others by the relevant authority.

Definitions
Explanation of key terms or concepts specific to this policy

Effective Date
Date when policy goes into effect. It may be a past, present of future date.

End Date
Date when the policy is no longer in effect.

External References
Any federal/state laws or regulations, other Board of Regents or UW System policies that
mandate, authorize or otherwise affect this policy.

Issuance Date
Original date when the policy is released to the university as approved. Unless otherwise noted,
this date is assumed to be identical to the Effective Date.

Next Review Date
Date of next scheduled review. This field should automatically change after any revision or
completed review.

Policy
A general written document by which the institution is guided in the management of its affairs.
This written statement mandates, specifies, or prohibits behavior to express the values of the
institution, enhance the institution’s mission, ensure coordinated compliance with applicable
laws and regulations, promote operational efficiency, and/or reduce institutional risk.

Policy Contact(s)
The policy contact is generally the subject matter expert designated by the Responsible Office to
be the first point of contact to answer policy questions and assist in policy interpretation.
Policy History
Background information on a policy’s development, such as issuance date, approval date(s) for any prior revisions of the policy as well as the policy’s initial approval date. Policy history will include any information about when a policy has been re-numbered, repealed or reviewed.

Policy Manager
Position (and by extension, the incumbent in a position) responsible for the development and administration of policies within a relevant domain; administration of policy includes policy interpretation and enforcement, as well as related procedures, processes, instructions, forms, and revisions. Depending on the scope of the subject matter, a policy may have more than one Policy Manager.

Rationale/Purpose
A brief summary of the policy’s primary objectives; may include the need for the policy (e.g., federal or state statutory requirements, meet the goals and objectives of the University, critical needs, etc.)

Related UW-Madison Documents
Other UW-Madison related documents/websites that provide relevant information and may be necessary to ensure compliance with the policy. Could include links to procedures or forms, for example.

Related UW-Madison Policies
Other UW-Madison policies that are closely related to the policy itself and may need to be known to users of the policy.

Scope
Who and/or what the policy applies to: Lists groups who must know and adhere to the policy. In the absence of a scope statement, the policy is assumed to apply to all members of the UW-Madison community (including, but not necessarily limited to faculty, staff, students, users, and visitors).

Other relevant terms:

Guidelines
General non-mandatory recommendations that provide readers with helpful information about how to achieve a particular aim; these might include recommendations, administrative instructions, best practices guidance, or frameworks in which to operate.

Institution-wide/University-wide
Refers to policy, procedures and guidelines that apply generally to all members of the UW-Madison community, including, but not necessarily limited to, faculty, staff, students, users, and visitors regardless of where the document originated.
Policy Making Process(es) [also: Policy Development]
Policy development and review through an established process to ensure that policies are developed, approved, and reviewed consistently. Documentation of policy development process(es) provides a single point of reference for information related to policy development and review.

Policy Management
A system for all of the elements and practices in the policy life cycle, including a framework and process for policy making or development, and the tools and techniques for policy curation and distribution.

Procedures
A description of the operational processes necessary to implement policy. Procedures include information on the offices and positions responsible for policy implementation, instructions to campus constituents regarding how to affect the policy, where to turn for information, and the like.

Systemwide Policy
UW System Administrative Policies are broadly applicable across all UW System institutions and are designed to promote efficiency, reduce risk, and/or enhance the operational objectives of the UW System.

Unit Policy
College/School/Division/Department/Unit policy that has application only within the issuing entity (e.g., applies only to unit employees, staff, and students working for or studying within the unit). A unit policy can create additional specifications, requirements, or restrictions as compared to higher-order policy (e.g., University-wide or UW System-wide policy) but cannot contradict or be less restrictive than a higher-order policy.