

BA01 BAO Policy Writing Guide

Effective 1 July 2001

Last Revised 4 June 2002

Who Should Read This Policy

BAO staff responsible for writing BAO policy and University departments using and implementing BAO policy should read this policy.

Background & Purpose

The purpose of this policy is to establish rules, procedures and resources that will help BAO departments create well-articulated policies in a consistent, readable, and understandable format.

Policy

BAO policies, like this one, (BA01 Policy Writing Guide), must be written using the BAO Policy Template,
<http://baowww.uoregon.edu/Policy/BAOPolicyTemplate.doc>.

The BAO Policy Team will review and approve all new and revised BAO policy before it is published and made effective. Those initiating new policy or policy revisions are encouraged to seek the assistance of the BAO Policy Team.

Authority

The Director of Business Affairs has authority for administering this policy and has delegated its implementation to the BAO Policy Team.

References

BAO Policy Template

Related Procedures

1. Preparation

The policy team or a BAO staff member initiates the process by identifying a need for:

- a. new policy, or
- b. revision of existing policy.

The policy team evaluates new policy using the following criteria:

1. Does it communicate about our values, philosophy or culture?
2. Does it inform about the BAO business model?
3. Does it concern an issue that deserves greater exposure and should be elevated beyond procedures or highlighted?
4. Does it establish and/or clarify authority?
5. Does it assign responsibilities to BAO staff or UO departments?

6. Is it general in nature and able to withstand the test of time (policy) or is it detailed in nature and subject to frequent change (procedure)?
7. Is it a rule for governing or a set of processes for implementing?
8. Does it fill a gap in external policy or expand on and add value to existing policy?

If the policy team determines that the policy should be written or revised, it assists the department in preparing a draft using the BAO Policy Template.

2. Approval

The BAO Policy Team reviews the policy draft or revision and either approves it or makes recommendations for changes.

Once a new policy is approved the BAO Policy Team assigns a number according to the following scheme,

BAXX Business Affairs General
EMXX Employee Services
FMXX Financial Management
ITXX Information Technology
IPXX Invoice Payments
PCXX Procurement/Contracting
PPXX Property Control
STXX Student Services
TRXX Travel

where XX represent consecutive numbers beginning with 01.

3. Distribution

The BAO Web Team publishes all policy on the BAO Policy web page, <http://baowww.uoregon.edu/policy.htm>

Each policy is published in Portable Document Format (PDF).

4. Communication

New policy or policy revisions that impact campus department operations will be announced on the BAONEWS email list. New policy or policy revisions that impact students or employees will be widely distributed when appropriate, (ie Dean's/Department Heads/Directors list, News and Views etc.).

5. Maintenance

BAO departments responsible for authoring BAO policy will provide the BAO Policy Team with any new policy or policy revisions MS Word file format.

The BAO Web Team will maintain a repository of all current and effective BAO Policy in MS Word, and PDF file formats.

Q&A

How do I distinguish between policy and procedure?

Policies are rules that govern business practices. Procedures are step-by-step processes implemented in order to comply with policy. See the criteria in the procedure section above and the definitions below.

Should I write a BAO policy to interpret all federal, state and OUS policy and other legislation that affects my business processes?

No, in many cases it is appropriate to site higher authorities in your procedural documentation. Occasionally the higher authority requires us to establish a BAO policy and occasionally a BAO policy may be warranted to clarify and synthesize complex or ambiguous rules established by a higher authority.

Compliance Examples

BA01 is an example of a policy written using the BAO Policy Template in consultation with and approved by the BAO Policy Team.

Contact

BAO Policy Team Coordinator, (541) 346-1116

Definitions

Policy

Policies are "rules" that govern the implementation of campus processes.

Procedure

Procedures are step by step "processes" for implementing policy.