Administrative Rules and Operating Procedures Handbook

Office of Administrative Rules & Operating Procedures

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Objective

Columbia Gorge Community College ('CGCC') houses institutional administrative rules and operating procedures ('AR/OP') within the Office of the President. This Administrative Rules and Operating Procedures Handbook is intended to:

- Provide a systematic process for developing, reviewing, updating, approving, and distributing institutional administrative rules and operating procedures;

- Improve the campus' process for documenting Board policies, administrative rules, and operating procedures; and

- Provide a systematic process for determining the need for an administrative rule versus a Board policy.

- Establish clear delegations of authority that will address a number of issues:

  - *Accessibility*. Currently, institutional rules and procedures are either undocumented or spread throughout numerous manuals, memos, shared drives, etc. Manuals that do exist are not always up-to-date and users can't always find the documents they need to make informed decisions. By establishing the Office of Administrative Rules and Operating Procedures, all rules and procedures will be located in a central place, where users can ensure they can find the most up-to-date information.

  - *Responsiveness*. The ability to create and/or quickly update and disseminate administrative rules and/or operating procedures will enable the campus to meet changing customer and community needs and adapt to new environments.

  - *Accountability*. Administrative rules and operating procedures which are clearly written and easily accessible are one of the foundational elements of any system in which individuals and departments are held accountable for adherence to, and compliance with, all campus administrative rules and operating procedures.

Note: These rules and procedures are separate from policies and related procedures established by the CGCC Board of Education.

Overview of Terminology

<u>Board Policy</u>

College Board policies are statements which set forth the purposes and prescribe in general terms the organization and programs of Columbia Gorge Community College. They create a framework within which the President and his/her staff can discharge their assigned duties with positive direction.

<u>Administrative Rule</u>

Administrative rules are regulations which allow the President and staff to carry out the everyday operations of the College. These regulations shall be designed to implement Board policies and to achieve the goals and objectives of Columbia Gorge Community College.

An administrative rule, as defined by <u>all</u> of the following criteria:

- Includes in its documentation WHAT the rule is, WHY it exists, WHEN it applies, and WHO it covers;
- Can range from a broad philosophy to a specific rule;
- Helps ensure compliance with applicable laws and regulations;
- Enhances the College mission and/or or reduces institutional risks;
- Mandates or constrains action;
- Requires a Presidential Decision Memorandum and approval for rule issuance and future revisions*; and
- Requires the appropriate ELT member to give all affected ELT members at least ten (10) working days notice prior to the adoption, amendment, or repeal of any administrative rule that impacts two (2) or more departments.

Note: Any procedural aspects not fundamentally changing the substantive content of an Administrative Rule may be changed at the ELT member's discretion as needed without prior approval of the President.

<u>Operating Procedure</u>

Operating procedures explain the specific steps necessary to carry our administrative rules. They are the step-by-step instructions for carrying out our everyday tasks.

Procedures:

- Include HOW to achieve the necessary results;
- Describe the critical steps undertaken to achieve the intent of the applicable administrative rule;
- Are succinct, factual, and to the point;
- Are usually expressed in lists; and
- Do not require approval by the President.

Why separate Administrative Rules and Operating Procedures?

Administrative rules reflect the "rules" governing the implementation of Board Policy. Operating procedures, on the other hand, represent an implementation of administrative rules and should evolve over time as new tools emerge, new processes are designed, and the risks associated with an area change in response to internal or external environmental changes.

In other words, operating procedures will probably change more frequently than administrative rules; therefore, it is recommended that administrative rules and operating procedures appear in separate documents. *(There will be a section on each administrative rule to cite the title and number of an applicable operating procedure.)*

Roles and Responsibilities

Columbia Gorge Community College Board of Education

The Board of Education shall have the following responsibility for Board Policies:

- The Board of Education will consider and act upon policies for the College as presented by the President or President's designee.

College President

The College President shall have the following responsibilities for College Administrative Rules and Operating Procedures:

- The President will be the chief executive officer and will be responsible for the professional leadership and skill necessary to translate the will of the Board into administrative action;
- The President will be responsible for all aspects of College operation as per directed by the Board of Education and is authorized to develop rules and procedures as necessary to ensure efficient operation of the College;
- The President, as the College's chief executive officer has, under the Board of Education's direction, general supervision of all programs, personnel, and activities of the College.
- The President is authorized to formulate administrative rules and operating procedures which align with Columbia Gorge Community College Board Policy; and to help facilitate implementation of administrative rules and operating procedures.
- The President is responsible for managing the College under the Board's policies and is accountable to the Board for that management.
- The President will review College administrative rules prior to approval utilizing a Presidential Decision Memorandum to ensure accuracy and content are consistent with CGCC standards and state law/administrative rules.
- The President will review and approve all CGCC administrative rules and ensure all employees follow all rules consistently.

Executive Assistant to the President and Board of Education (EA)

The Executive Assistant shall serve as the lead contact, overseeing the development and maintenance of CGCC administrative rules and operating procedures within the Office of the President. The responsibilities of the EA include, but are not limited to:

- Establishing the Office of Administrative Rules & Operating Procedures within the Office of the President;
- Reviewing all CGCC administrative rules prior to approval to ensure consistency in formatting, numbering, and overall compliance with the Administrative Rules and Operating Procedures Handbook;
- Maintaining a record of all new, revised, and rescinded administrative rules and operating procedures;
- Developing and maintaining a tracking/tickler system to ensure each administrative rule is reviewed and renewed every two (2) years as per the Administrative Rules and Operating Procedures Handbook;
- Providing training/consulting to preparers of administrative rules and operating procedures; and
- Ensuring that all new or revised administrative rules are distributed to appropriate personnel as per the specifications in the Administrative Rules and Operating Procedures Handbook.

Executive Leadership Team (ELT)

Individual ELT members shall have the following responsibilities (within their respective departments):

- Determine the need for a Board Policy versus an administrative rule and operating procedure. (The EA is available to help with this determination.)
- Determine if there are overlapping administrative rules, which can be incorporated into one administrative rule through collaboration.
- Assure the technical accuracy of the contents of all administrative rules originating from their departments. It may be necessary to collaborate with other ELT members when developing or updating the administrative rule in order to ensure accuracy.
- Ensure that all administrative rules assigned to their departments are reviewed and renewed every two (2) years (or sooner if indicated).
- Monitor ease of use and compliance. When there is a high level of non-compliance across campus or when there are a large number of questions

regarding an administrative rule or operating procedure, the ELT member should identify problem areas that may be introducing confusion. It is important to recognize that systems, processes, and the campus culture are constantly changing and evolving, and the administrative rules must keep pace with those changes.

- Ensure employees within their department are aware of and follow all administrative rules and operating procedures.

Human Resources

Human Resources shall have the following responsibilities:

- Review accuracy and content of administrative rules and operating procedures as applicable to personnel practices and bargaining unit contracts.

The Development Process

<u>General Overview</u>

The following steps will help you get started.

1. Consult with the Office of Administrative Rules & Operating Procedures for questions about the components of an administrative rule or operating procedure, the recommended templates, and the standard language and terminology that should be used in administrative rules and operating procedure documents.

2. Develop a document outline.

3. Verify the outline with your supervisor and other subject matter experts.

4. Determine who will be the authors/reviewers of your administrative rule or operating procedure (if applicable).

5. Consult the style guidelines contained in this document.

6. As you develop your administrative rule or operating procedure, keep the Executive Assistant to the President informed of your progress and seek her assistance where appropriate (e.g., as you determine the approvals that may be required).

7. Designate appropriate administrative rule (or procedure) "experts."

8. Obtain the appropriate approvals.

9. Provide the final administrative rule or operating procedure document to the Executive Assistant to the President in both electronic and hard copy form.

The Approval Process

Administrative Rule Approval Procedure Checklist (see Exhibit A):

We have established two checklists to help you with the administrative rule approval process.

If the administrative rule only affects one department:

- ✓ Originator checks for existing administrative rules/operating procedures.

- ✓ Originator creates a Charter and includes the draft administrative rule as a reference document.

- ✓ Existing operating procedures are also included as a reference document if available.

- ✓ After the Charter is complete, originator activates the approval process. (Allow 5-7 business days for the approval process. If the rule is not approved during any of these steps, the originator must make the necessary changes and then reactivate the approval process.)
    - o Direct Supervisor
    - o ELT Supervisor
    - o Executive Assistant to the President/Board of Education

- ✓ Final approval lies with the President and is documented by a Presidential Decision Memorandum (PDM).

- ✓ Upon approval by the President, originator creates/revises operating procedure to accompany the administrative rule.

- ✓ Originator sends the final copies of the administrative rule and operating procedure to the EA (electronic and hard copy).

- ✓ EA publishes new administrative rule/operating procedure to the online manual and updates staff.

✓ Originator's department provides training and/or orientation for the new administrative rule, as necessary.

✓ Every two years, originator reviews administrative rule/operating procedure and makes necessary revisions.

If the administrative rule affects two or more departments:

✓ Originator checks for existing administrative rules/operating procedures.

✓ Originator creates a Charter and includes the draft administrative rule as a reference document.

✓ Existing operating procedures are also included as a reference document if available.

✓ After the Charter is complete, originator activates the approval process. (Allow 5-7 business days for the approval process. If the rule is not approved during any of these steps, the originator must make the necessary changes and then reactivate the approval process.)
   o Direct Supervisor
   o ELT Supervisor
   o Executive Assistant to the President/Board of Education

✓ Executive Assistant puts the proposed administrative rule on the agenda for the next ELT meeting. (The ELT has a one-week review period in which to offer suggested edits)

✓ Final approval lies with the President and is documented by a Presidential Decision Memorandum (PDM).

✓ Upon approval by the President, originator creates/revises operating procedure to accompany the administrative rule.

✓ Originator sends the final copies of the administrative rule and operating procedure to the EA (electronic and hard copy).

- ✓ EA publishes new administrative rule/operating procedure to the online manual and updates staff.

- ✓ Originator's department provides training and/or orientation for the new administrative rule/operating procedure, as necessary.

- ✓ Every two years, originator reviews administrative rule/operating procedure and makes necessary revisions.

Operating Procedure Approval Procedure Checklist (see Exhibit A):

Operating procedures should be developed in coordination with administrative rules and revised as procedures change, or at least every two years with the review of associated administrative rules. Operating procedures do not require approval by the President, but require the following approvals:

- ✓ Direct Supervisor
- ✓ ELT Supervisor
- ✓ Other affected ELT supervisors
- ✓ Executive Assistant to the President/Board of Education (to review for adherence to Administrative Rules and Operating Procedures Handbook)

Final Approval of Administrative Rules

Following the resolution of any issues, the Executive Assistant to the President will send the draft to the President for final approval. Every new or revised administrative rule must be approved by the administrative rule originator; the appropriate ELT member(s), and Human Resources (if it involves collective bargaining or personnel) before submission to the President.

The administrative rule is not considered official until all of the signatures have been gathered and the approval is returned to the Office of Administrative Rules & Operating Procedures.

Once the approval has been received, the EA will post the new rule on the College's website/Intranet, as well as a description of the new or revised administrative rule on

the appropriate revision page. The approval date is the date of the final approving authority's signature on the approval.

The Office of Administrative Rules & Operating Procedures will distribute a monthly all campus e-mail notification of all new and revised administrative rules and operating procedures.

Updating/Reviewing Administrative Rules

Administrative rules require a full review every two (2) years following the approval date. It is the responsibility of the rule originator to complete this review to determine which of the following statements are applicable:

- **No changes required** - All statements, procedures, content, contact information, references, links, etc. are accurate and the administrative rule can be reissued as is. You will receive a final approval with the attached administrative rule to verify that the administrative rule section remains completely accurate. The administrative rule section will be reissued.

- **Minor revisions are required** - Contact information, department names, or referenced section names have changed, but the basic content of the administrative rule is still accurate. Request the electronic file for the administrative rule section from the Office of Administrative Rules & Operating Procedures and make your edits. The Office of Administrative Rules & Operating Procedures will determine if the revised section requires formal review prior to final approval.

- **Major revisions are required** - The administrative rule and/or procedure is outdated or out of compliance. Determine your target date for submission of the draft for review. Request the electronic file for the administrative rule to make your edits. Consult with the Office of Administrative Rules & Operating Procedures as needed to assist with content, structure, and organization.

- **Delete from manual** - This administrative rule is no longer required. You must provide a statement describing the reason why the AR is to be deleted, and where departments can go to get information on the current procedure.

Technical Updates

Technical updates are updates that occur between review cycles to provide clarification or minor procedural changes (e.g., changing a department name in procedures to reflect an organizational change). Technical changes can be requested and made without going through the formal review process or final approval process.

Technical updates cannot be used to make significant changes to administrative rules or procedures.

The number of technical updates to a single administrative rule must be minimal. When an administrative rule requires multiple technical updates, it indicates that the administrative rule needs a more thorough review and it should be fully updated.

Technical updates will not be made to administrative rules that are due for update and already require a full review, but can be made on administrative rules that would otherwise be reissued.

Revision Dates

When a technical update is made to administrative rules a revision date is appended to the approval date. The revision date does not modify the normal review cycle for the administrative rule. The administrative rule will still require a full review and update two (2) years following the approval date.

Administrative Rule Update Submission Checklist

Use this checklist to verify that you have completed necessary steps to update your administrative rule (required every two years following the approval date) before submitting to your ELT supervisor.

- ✓ I have used the administrative rule file provided by the Executive Assistant and tracked the changes.

- ✓ I have reviewed the administrative rule for compliance with other relevant administrative rules.

- ✓ I have reviewed the accuracy of position titles and departments named in this administrative rule.

- ✓ I have reviewed the accuracy of contact information (phone numbers, email addresses, URLs) included in this administrative rule.

- ✓ I have added applicable hyperlinks in the administrative rule.

- ✓ I have reviewed the list of references and related administrative rules to ensure the administrative rule numbers/names are accurate, the administrative rules still exist, and the listed administrative rules are still relevant.

- ✓ I have consulted with departments who contribute to, or play a role in, the steps described and have included a list of the individuals consulted by name, title, and department.

- ✓ I have provided a summary of the changes and reasons for the proposed changes (if applicable).

- ✓ My department has considered the impact this change would have on resources (e.g., costs to departments, increases in workload, etc.).

- ✓ My department has considered how compliance will be monitored.

Standard Template

This exhibit provides a brief overview of the information normally contained in a standard administrative rule and/or operating procedure. Some sections will deviate from this standard, but most sections should retain these general standards for ease of use. Depending on the complexity of the administrative rule or the operating procedure, not all of the sections may be used on a specific document.

Contact the Office of Administrative Rules & Operating procedures for additional information or assistance with the structure of your document. See Exhibit C for an example.

The Numbering System

010.000.000 College-Wide (Mission, Vision, Values, Strategic Plan, Core Themes, KFA's)
020.000.000 Board (Policies)
030.000.000 Students
040.000.000 Instruction
050.000.000 Finance
060.000.000 Facilities
070.000.000 Human Resources
080.000.000 IT
090.000.000 College Advancement
100.000.000 Sustainability

The numbering system consists of three parts:

- The first part is the department number (3 digits), the second is the administrative rule/operating procedure number (3 digits), and the third part is the section number (3 digits). For example 070.001.010 would be section 10 of Administrative Rule 001 of department 070 (Human Resources).

- The first administrative rule issued by any given department would begin with 001and every subsequent administrative rule would be assigned the next sequential number, i.e. 001, 002, 003, etc.

- As a general rule, section numbers are ten points apart (for example, 070.001.010, 070.001.020, etc.). New sections added are generally sequenced

where appropriate in between the ten-point sections in divisions of five (for example, 070.001.010, 070.001.015, etc.). When sections are already sequenced in groups of five, new sections can be added as 070.001.011, etc. Sections in new Administrative Rules should have 10 point spreads so there is room for new sections in later amendments.

Components of Administrative Rules

Campus rule documents should use a consistent format applying standard language and icons so as to provide an overarching guide to carrying out College Board administrative rule and other institutional operations. They should include the following components:

Header

The header for each administrative rule includes the chapter number and name, section number and name, approval date, effective date, supersedes date, responsible department, and source document. Section names should be as simple and clear as possible to aid users finding appropriate administrative rule sections.

If the proposed administrative rule is to have an effective date different from the approved date, enter the effective date. If no effective date is specified, the effective date will be the same as the approval date. Note: the effective date cannot be before the approval date.

Purpose or Overview

The purpose or overview recognizes the legitimate interests of all parties, describes the overall benefits, and also describes the (competing) concerns that the administrative rule seeks to manage. Reasons for an administrative rule are often not clear to an end user, so this section is intended to provide some basic explanations for the considerations and requirements that call for an administrative rule.

Briefly summarize the information covered in the section. A concise summary of the objectives may also be given if it helps to clarify the subject matter. The purpose statement should inform readers why the section was issued and what information they will find there. If applicable, provide reference to a related CGCC administrative rule section or other section for specific procedures addressed elsewhere.

Questions to consider when writing the purpose section:
- Does it clearly state the objective(s) of the administrative rule?
- Does it reflect the mission, values, and strategic directions of the institution?
- What applicable legal and regulatory mandates are being addressed by the administrative rule?
- What conflicts or problems are being addressed by the administrative rule?
- What financial, operational, technological needs are being addressed by the administrative rule?

Applicability (Who is governed by this administrative rule?)

List the members of the CGCC community who have the responsibility to adhere to the administrative rule, such as staff, faculty and/or students. Others governed by the administrative rule may include people working on behalf of CGCC, visitors, and others involved in certain administrative transactions.

This section also describes whom the administrative rule applies to and the consequences of non-compliance. This includes College-wide or specific employee consequences.

Exclusions & Special Situations

List any locations or organizations (internal or external to CGCC) that are excluded from the administrative rule; additionally list any funding sources or job classifications that are excluded from the administrative rule. If there are no exclusions, a statement to that effect should be included in this section.

Special situations should contain information about important circumstances that affect only a few people or circumstances that occur infrequently.

Strategic Direction

Please list the relevant KFA, accreditation standard, and/or Core Theme that this administrative rule relates to.

Administrative Rule Statement

This section specifies the basis for the administrative rule and states what requirements the administrative rule establishes. It will usually be the largest section, with the various

topics and content of the administrative rule laid out in various sections. This section allows for a fuller description of the issues that are being conveyed to the reader. Within this section, headings for each topic or subtopic should be considered in order to help the reader navigate and understand the administrative rule components.

The administrative rule statement is the governing principle, plan, or understanding that guides the action. It states what we do and why, but not how. The administrative rule statement(s) should be brief, and will be supplemented by the information within the rest of the section. This should be a brief statement regarding the College's administrative rule on the subject matter without a complete, detailed explanation of responsibilities or procedures.

Questions to consider when writing the administrative rule statement section:
- Does it accomplish the purpose of the administrative rule?
- Does it clearly articulate what the administrative rule is and what it is to accomplish?
- What is the scope of the administrative rule?
- Does this section contain only administrative rule (not procedures)?
- Are the responsibilities for entities or individuals clearly stated?
- Is the administrative rule section consistent with the applicable laws, regulations, and administrative rules listed in the reference section?

Definitions

When the subject matter requires a precise understanding of terms, include them here. This allows a reader to approach the content in a more knowledgeable manner, and to easily refer back to the definition as needed when the term is used frequently throughout the administrative rule section. When a term has more limited use, it can be defined in the body of the section and Definitions may be omitted. Only terms that are actually used in the administrative rule should be included. Please underline the term being defined.

Questions to consider when writing the definitions section:
- Does it define new, uncommon, and/or specialized terms?
- Does it define terms that can have different meanings in different contexts?
- Does it list terms in alphabetical order?
- Are terms italicized, followed by a colon, and defined with a complete sentence? (e.g. *Term*: The definition of the terms goes here.)

Interpretation of Administrative Rule

In this section, state who maintains authority for the interpretation and application of the rule.

Cross References to Related Administrative Rules

An administrative rule topic may be addressed in more than one administrative rule, so list those rules in this section. It may also be useful to list related administrative rules for certain transactions or constituencies. A referral may also be made broadly for informational purposes to another administrative rule.

Web Address

Whenever possible, provide URL addresses that the reader can use to link to the actual referenced document(s).

Appendix

Appendices are used for informational material that is directly related to the implementation of the administrative rule. All information here should be arranged under additional subheadings within this section.

Information in the appendix—such as procedures, forms, instructions, Frequently Asked Questions, etc.—can be updated by the Responsible Office and does not require review by the Office of Administrative Rules & Operating Procedures. These items should be reviewed and approved by the responsible Department Chief before they are included in an updated administrative rule document.

Further Information

Be sure to provide contact information for individuals who may need assistance or additional information regarding topics covered in the administrative rule section. This could include (office name and telephone number, email address, Web address, etc.).

Components of Operating Procedures

Campus procedure documents should use a consistent format applying standard language and icons so as to become an easy-to-use reference and training tool for employees. They should include the following components:

Headline Banner

The headline banner shall include the procedure number, procedure title, issue date, "supersedes" notification, department of origin, and effective date. The procedure number, procedure title, and issue date should appear on all subsequent pages.

Note: The procedure title should be carefully selected so that it is simple and clearly conveys the procedure's content.
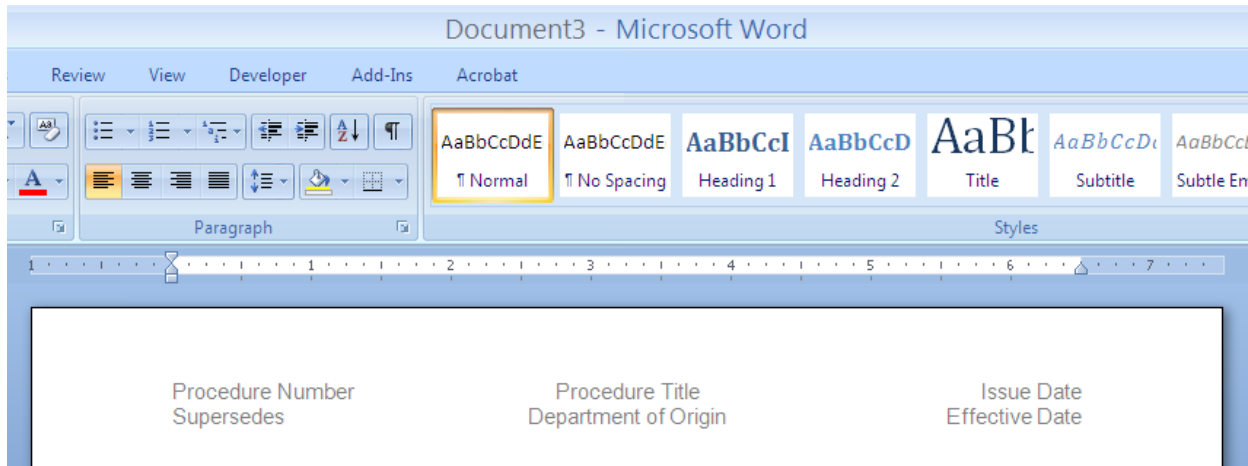
The footer of each page shall include the procedure number, procedure title, and page number.

Overview/procedure description

The description summarizes the overall objectives, functions, or tasks that the procedure is designed to accomplish and the circumstances under which the procedure should be used.

Areas of responsibility

This section lists departments, units, offices, and individual job titles for those who have responsibility for aspects of daily control and coordination of the procedure, authority to approve exceptions to the procedure (if applicable), and procedural implementation (including responsibility for any required electronic or written forms). This section sets forth the scope of such departments, offices, or responsibilities of individuals under the procedure, the procedural areas subject to discretionary modification (if any), and the responsibility for implementation.

Operating Procedure Details

Procedures articulate how administrative rules will be implemented. The operating procedures should be organized for ease of use. Some administrative rule sections may require multiple procedure headings for the different tasks addressed. Procedures should be organized chronologically by task.

Using an approach which is customized to the subject (i.e., a statement in outline format of each step required, a checklist of what needs to be done, an explanation of how to complete the necessary forms or screens—including copies of the forms or screens, or an appropriate combination of techniques), provide the reader with the necessary procedural and "how to" information. Included in this section should be definitions of unique terms or terms subject to different interpretation and copies of all forms needed to complete the procedure. A transaction flow chart might also be included in this section.

The action steps included here should clearly and accurately describe the mandated process and responsibilities for accomplishing tasks governed by the administrative rule, but should not be overly detailed. Procedures are the *required* process for the specific situation. In addition to supplying procedures, you may want to include guidelines. Guidelines provide suggested methods for accomplishing tasks governed by the administrative rule, but are not mandatory procedures. Guidelines and other

supplemental information may be better maintained on the administrative rule owner's Web site.

Procedures describe how the administrative rule is implemented at CGCC. Some administrative rule sections may find it useful to include specific roles and responsibilities as a separate heading rather than within the procedures. Roles and responsibilities provide the list of tasks that must be completed, organized by individual or department who completes each task.

Questions to consider when writing the procedure section:

- Is it consistent with the administrative rule statement section?
- Does it contain the specific actions or steps needed to comply with the administrative rule?
- Does it contain implementation plans and dates for administrative rules that require a phased implementation?
- Are procedural requirements reasonable?
- Does this section contain only procedures (not administrative rule)?
- Is the procedure section consistent with the applicable laws, regulations, and administrative rules listed in the reference section?

References

CGCC administrative rules, federal and state laws and regulations, or other references directly applicable to the procedure.

General Writing Tips

When writing, keep in mind that you are an expert in the area on which you are writing, but that the users of your section will not be. Many people referring to this administrative rule or operating procedure may be new to their current position, or new to the campus altogether. This means that you need to keep your administrative rules and operating procedures as simple and straightforward as possible. Provide enough information for users to understand but not so much that they become confused. Keep your language straightforward, and write with attention to what the general campus population needs to know, not what a specialist in your own department needs to know. Remember that you can always provide supplemental information for those users who may need more assistance.

Do not confuse "administrative rules "with "operating procedures" or "guidelines." The term "administrative rule" refers to a rule that explains why we have certain operating procedures or guidelines, but **not** how to accomplish tasks. Operating procedures and guidelines are similar, but operating procedures are the required steps a user must take to be in compliance with an Administrative Rule. Guidelines are recommended best practices for departments to accomplish tasks but are not required to be in compliance.

Operating procedures should be presented in a step-by-step manner and should include locations, or links to, electronic forms that are part of the procedure. Word choice in this section can also make a big difference in how easily your procedures can be used. For example, using the word "shall" or "must" indicates that something is required, while the term "should" implies that there might be other options, or that a department could bypass the task associated with that step.

Avoid including the type of information that is likely to change frequently. Instead of using an individual's name, use the position title. Instead of including a building name, refer just to the department name. By carefully considering the type of information you include in the document, you can help ensure better accuracy for a longer period of time.

Finally, remember that when it comes to writing administrative rules, less is more. Don't use ten words to say what could be said in four. Keep your statements clear and to the point. If you are able to develop a user-friendly administrative rule, you increase the likelihood that users will refer to the administrative rule rather than call you, will work to stay in compliance, and will contribute to increasing efficiency across campus.

Good administrative rules:
- Are written in clear, concise, simple language;
- Address what the rule is rather than how to implement it;
- Are readily available to the campus community and their authority is clear; and
- Represent a consistent, logical framework for campus action.

Good operating procedures:
- Are tied to administrative rules and describe this relationship, as well how the operating procedure helps the campus achieve its goals or strategic plan;
- Helps to ensure understanding and compliance with administrative rules;
- Are developed with the customer/user in mind; and
- Are written so that what needs to be done can easily be followed.

Writing Style Tips
- Be concise; use minimum verbiage (short, one or two syllable words).
- Use everyday language.
- Use common words (e.g. "use" instead of "utilize").
- Avoid the use of jargon, unnecessary technical expressions, and fancy vocabulary.
- Ensure your rule or procedure is simple enough to be understood by a new employee; don't be too technical.
- If you use an acronym, spell it out the first time you use it.
- Be factual and double check for accuracy.
- Don't include information that may be quickly outdated (e.g. names).
- Use active, rather than passive language.
- Write as you would speak, editing out informal words or phrases.
- Include step-by-step instructions for completing forms.
- Provide links to forms.

Keep the structure simple
- Use short sentences (maximum of 15 words).
- Use short paragraphs (maximum of 100 words for administrative rules; maximum of 40 words for operating procedures).
- Use lists – it makes things easier to read, and encourages short sentences.
- Be consistent – repetition of familiar words increases comprehension.
- Remove words that don't add meaning. Write as you normally do, and then edit to create short sentences to remove unnecessary words and information that

does not add value to the administrative rule or procedure. For example, use "Often" instead of "In many cases"; "Before" instead of "Prior to", "Because" instead of "Due to the fact that".
- Use the numbering system to facilitate easy referencing.

Be Specific – Mean what you say and say what you mean
- Rather than "Submit the appropriate form" say "Submit the [name] form".
- If the action is mandatory, use words like "must" or "will".
- If the action is recommended or there are valid reasons to deviate from the requirement under particular circumstances, use "should".
- If the action is permissive, use "may".
- The word "shall" must be avoided unless there is a legislative requirement that prescribes its use. This word causes confusion between whether an action is mandatory or recommended.

Intent
- Use terms that accurately convey the intention of the administrative rule.
- Be careful about using absolute terms (shall, must, will, all, etc.) versus conditional terms (could, may, some, etc.).
- Do not put unreasonable obligations or duties on the institution or the members of the institution. For example, the institution cannot "ensure" an environment free from sexual harassment.

Voice
Administrative rules should be written in the third person.

Focus on the Target Audience
Campus administrative rules may be used by a wide variety of campus users, including individuals who are new to campus; those who are taking on new responsibilities; or those who are responsible for a business function that is completed only rarely.

The originator should remember that the target audience will probably not have the knowledge of the subject matter experts, and should try to explain the rule/ procedure as clearly as possible.

EXHIBITS