

## INSTITUTIONAL POLICY DEVELOPMENT AND APPROVAL

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**INTRODUCTION:** All Montana State University Billings institutional policies are an endorsement of the University and therefore require official approval. Across this spectrum of policies, the University is committed to ensuring collective input and shared governance in the development and approval of all policies regardless of the scope, intent, and applicability. Policy establishes the principles for developing and implementing processes and procedures.

### **DEFINITIONS:**

**Policies** are the statements that reflect the guiding principles of action adopted by the institution. Policies must be consistent with relevant federal and state laws, rules and regulations; the Montana University System Board of Regents; and Montana State University Bozeman policies.

#### **A policy:**

1. is a governing principle that permits, requires, or restricts actions;
2. assures compliance with applicable laws and regulations, enhances the University's mission, promotes operational efficiencies, and/or reduces institutional risk;
3. is durable and sets a course for the foreseeable future;
4. should be accessible, i.e., easily located and searchable;
5. should be usable, i.e., easily understood by a range of readers;
6. is broad enough to permit discretionary action in resolution of day-to-day situations yet be specific enough to provide clear guidance.

**Procedures and processes** govern daily practice and are more regularly subject to change.

**PROPOSAL:** Any employee, in collaboration with their direct supervisor, may propose a new or revised institutional policy.

**MAINTENANCE:** Policies shall be reviewed on a regular basis. As needed, minor and routine changes such as updating of a policy title or reference, law, organizational name or title listed in a policy, changes required by law or regulation, or correction of typographical errors shall be made.

**COLLECTION AND ARCHIVING:** All institutional policies and amendments to policies, upon ratification, will be collected and archived. A copy of all policies shall be kept electronically on the University's public website and listed publicly in the University's policy directory.

## INSTITUTIONAL POLICY PROCEDURE AND PROCESS

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Policies are adopted, implemented, and modified through the following sequence of steps. Additional steps may be recommended at any stage of this process.

**1. AUTHORSHIP OF DRAFT POLICY:** The individual, unit, department, and/or committee ultimately responsible for implementing the policy shall typically be the originator and author of the proposed new or revised policy. Where appropriate, draft policies should be discussed with any stakeholder aligned with the originating individual or group. The development or revision of a policy should be done with the oversight of the supervisory Vice Chancellor. The supervisory Vice Chancellor, or designee, shall engage in the necessary consultations and research to ensure the proposed policy's legality; consistency with other relevant policies, both internal and external (Montana University System/OCHE/Regents); feasibility and sustainability; and appropriateness.

**2. CABINET REVIEW:** Proposed new/modified policies shall be presented to the Chancellor's Cabinet for reading and feedback before advancing to Jacket Leadership Team.

**3. JACKET LEADERSHIP TEAM REVIEW:** The proposed new/modified policy is presented to the Jacket Leadership Team for first reading, campus dissemination, review, and feedback. Members of the Jacket Leadership Team are responsible for disseminating draft policies to their area to collect and share feedback. Review and feedback periods will take place between regularly scheduled Jacket Leadership Team meetings unless otherwise noted. Based on feedback, either the policy is returned to the originator with feedback for modifications, or it is advanced to the next step.

**4. REVISION:** The originating entity shall consider campus feedback and will make any modifications to the policy or amendments it deems appropriate prior to advancement in the process. If there are no modifications as a result of the campus review, the policy advances to the next step. In the event the campus review and subsequent feedback results in substantial changes to the draft policy or amendment, the originating entity shall restart this process with step two above.

**5. JACKET LEADERSHIP TEAM APPROVAL:** Draft new/modified policies are presented to Jacket Leadership Team for a final reading. A vote will take place on whether to approve the policy. If approved, the policy shall be adopted.

**6. ADOPTION:** Upon adoption, members of the Jacket Leadership Team will disseminate the policy to their constituents. The policy is placed on the University's website, listed publicly in the University's policy directory, and thus made available to all employees.

## INSTITUTIONAL POLICY DEVELOPMENT AND APPROVAL FLOW CHART

### **1. PROPOSAL**

Any employee may propose a new or revised institutional policy. Proposal of new or revised policy shall be submitted to the supervisory Vice Chancellor for consideration.



### **2. POLICY ORIGINATOR AND AUTHOR**

The individual, unit, department, and/or committee responsible for implementing the policy will typically be the originator and author of the policy. The policy author will draft policy with oversight of the supervisory Vice Chancellor or designee.



### **3. CABINET REVIEW**

Policies are presented to the Chancellor's Cabinet for review and feedback before advancing to the Jacket Leadership Team.



### **4. JACKET LEADERSHIP TEAM, CAMPUS REVIEW, REVISIONS**

Policies are presented to Jacket Leadership Team for first reading, dissemination, review and feedback. Revisions will be considered based upon campus feedback.



### **5. JACKET LEADERSHIP TEAM VOTE**

Policies are presented to Jacket Leadership Team for final reading. A vote will take place to approve the policy.



### **6. ADOPTION**

Upon adoption the policy is placed on the University's website, listed publicly in the University's policy directory, and made available to all employees.



## IMPLEMENTATION GUIDELINES

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The following guidance represents best practices for policy originators and authors.

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- 1.** Draft proposed new/revised policy in supplied Microsoft Word Template with “Draft” watermark.
- 2.** Duplicate the Microsoft Word document with redline and tracked changes for each review and reading.
- 3.** Send drafts to the Executive Assistant to the Chancellor as a Microsoft Word document prior to each scheduled presentation and reading.
- 4.** Once approved, finalize the Microsoft Word document and export as .PDF document.
- 5.** Publish the document to the University’s public website.
- 6.** Submit .PDF and public website link to Executive Assistant to the Chancellor, Director of University Communications and Marketing, and Web Content Manager.
- 7.** Web Content Manager will list policy in the University’s policy directory.

## POLICY DEVELOPMENT TRACKING

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The following guidance directs the Chancellor, Vice Chancellors, and the Executive Assistant to the Chancellor on tracking the development of new/revised policy.

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- The Supervisory Vice Chancellor will identify a timeline for drafting new/revised policy.
- The Supervisory Vice Chancellor will submit new/revised policy to the Chancellor for inclusion on Cabinet and Jacket Leadership Team agendas.
- The Executive Assistant to the Chancellor will disseminate appropriate draft versions to Cabinet and Jacket Leadership Team alongside agendas.
  - Drafts should be disseminated as .PDF documents.
  - When appropriate, present a redline version of drafts without comments as .PDF documents.
- The Executive Assistant to the Chancellor will track new/revised policies through Cabinet and Jacket Leadership Team meetings up to approval.
- Once approved, the policy author will publish policy in accordance with the Implementation Guidelines.
- Once published, the Executive Assistant to the Chancellor will email Jacket Leadership Team with direct links to the published policy using the provided template. It is the responsibility of Jacket Leadership Team to disseminate policy to their constituents.



## EMAIL TEMPLATE: APPROVED AND ADOPTED POLICY

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The following template is the standard distribution from the Executive Assistant to the Chancellor to Jacket Leadership Team upon policy being published to the directory.

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### STYLING GUIDANCE:

- Dates should be listed as [MONTH, DATE, YEAR]. For example, January 1, 2024.
  - Hyperlinks to .PDF of policy listed in the directory should be listed as the title of the policy.
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### TEMPLATE:

**SUBJECT:** Approved Policy - [MONTH, DATE, YEAR]

Jacket Leadership Team,

The following policies were approved and adopted during the [MONTH, DATE, YEAR] Jacket Leadership Team Meeting. They are now available publicly in the online policy directory.

- [Donated Sick Leave](#)
- [Hospitality and Entertainment](#)

It is the responsibility of Jacket Leadership Team members to disseminate adopted policy to their constituents.

Thank you,

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