

## Commonly Used Policy Terms

**Effective Date:** means the date which the current policy enters into force.

**Establishing and Maintaining Presidential Policies:** “Policy on Policies” that establishes the Policy Framework and Policy approval process.

**Guidelines:** mean written, best practices for implementing a policy. Guidelines are freestanding and are maintained by the department on their Departmental web portal, with links to the Guidelines provided in the corresponding Policy.

**Initial Issuance:** means the release by the Universitywide Policy Office of a completely new policy, which has been issued by the President.

**Interim Policy:** A provisional policy document issued when a university policy is needed within a time period too short to complete the process described herein. Interim Policies are in effect for 6 (six) months, with possible renewal in additional 6 (six) month increments.

**Issuance Date:** means the date on which the President signed the Issuance Letter

**Issuance Letter:** A cover letter signed by the President which makes a draft Presidential Policy and Official Policy available to the public and located on the Presidential Policy Website.

**Policy Advisory Committee (PAC):** means the group designated by the Policy Steering Committee with responsibility for reviewing and making recommendations to Policy Steering Committee. The PAC membership can be found on the [Policy Governance Site](#).

**Policy Owner (PO):** The individual (by position) who is the subject matter expert and is responsible for policy interpretation or other general questions for a particular policy. Policy Owners are designated by the Responsible Officer/Office (RO).

**Policy Memorandum:** A document drafted by the Policy owner which outlines the process that was taken to develop the draft Policy. This includes the reason why the policy is necessary, the stakeholders which were consulted and how stakeholders concerns were addressed. Sample Memoranda are located in the [Policy Development Toolkit](#).

**Policy Steering Committee (PSC):** means the group charged by the President with responsibility for oversight of the University of California Presidential Policy Process. The PSC membership can be found on the [Policy Governance Site](#).

**Presidential Policy** means a governing principle that mandates or constrains actions and:

- That applies across the University of California;
- Must be warranted to ensure compliance with applicable Federal, State and Local laws and regulations, University policies and Board of Regents Bylaws, Standing Orders or Policies (governing documents), enhances the University's mission, promotes operational efficiencies, and reduces University risk;
- That endures from one administration to another and sets a course for the foreseeable future; and
- That is approved by the President or designated executive upon recommendation of the Policy Steering Committee.

Presidential policies address all operations of the University except for those reserved to the Board of Regents or to the Academic Senate ([RSO 105.2](#)).

**Presidential Policy Approval Process** refers to the Presidential Policy submission and review process of including review by the Policy Advisory Committee, the Policy Steering Committee and Presidential Issuance. All new and revised Presidential Policies are required to go through the Presidential Policy Approval Process except for Policies undergoing Technical Changes.

**Procedure:** Is a step-by-step description of the tasks required to support and carry out organizational policies. Procedures are freestanding documents located on the Departmental website, with links provided in the corresponding Presidential Policy. A quick comparison between a policy and procedure is found in the [Policy Toolkit](#).

**Rescission:** means the decommissioning of a policy that is no longer needed or is more effectively combined with another policy.

**Responsible Office/Officer (RO):** is an executive designated by the President as responsible for the high-level oversight of Presidential policies that naturally fall within their areas of responsibility.

**Technical Changes:** include title changes due to University Presidential reorganization, or any additions or deletions that do not materially change the policy's intent and that therefore do not require Full Policy Review.

**Presidential Policy Template (Template):** means the approved format and style for all Presidential policies.

**Rescission:** Decommissioning a policy that is no longer needed or has been combined with another policy

**Stakeholder(s):** A constituency or functional group with a substantive interest in the policy or its implementation. Responsible Officers may identify an individual or organization, whose university role or professional expertise relates to the subject of the policy, and who, therefore, is consulted for comment on its draft.

**Universitywide Policy Office (UPO):** Within Ethics, Compliance and Audit Services, coordinates the Policy Process and staffs the Policy Advisory Committee and Policy Steering Committee. The UPO will assist with the development of the policy and is charged with stewardship of the official policy template, guiding policies through the development process and maintaining an central repository of University policies.