



Sarah Ebben
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June 21, 2024

To: Chancellors
Provosts
Chief Business Officers
Senior Student Affairs Officers
Senior Student Enrollment Officers
Chief Diversity Officers

From: Johannes Britz, Interim Senior Vice President for Academic and Student Affairs
Sean P. Nelson, Vice President for Finance and Administration

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Johannes Britz
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Sean P. Nelson
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Re: Fiscal Year 2025 UW System Administrative Policy Priorities

The purpose of this memorandum is to provide an accounting of the policy work completed in fiscal year 2024 and to notify institutions of the University of Wisconsin System Administrative (SYS) policies and procedures that are scheduled for revision or development during fiscal year 2025. A listing of the monthly institution distribution dates for fiscal year 2025 is provided at the end of this memorandum. All SYS policies, procedures, and guidance documents for review that month will be distributed in a single email on these dates to minimize the burden on campus stakeholders who may wish to provide feedback.

In fiscal year 2024, 54 SYS policies, procedures and guidance documents were approved. This included seven (7) new SYS policies, one (1) new interim policy action and 30 SYS policy revisions that were approved by the Universities of Wisconsin President. This also included one (1) new SYS procedure and three (3) approved revisions to existing SYS procedures. Additionally, one (1) new guidance document, two (2) revised guidance documents were approved. In addition, two (2) SYS policies were rescinded, two (2) SYS procedures were rescinded, and two (2) interim policy actions were repealed or expired. Lastly, three (3) policies were renumbered, one (1) FAQ page was revised, and one (1) new Interim FAQ page was approved.

Furthermore, the Universities of Wisconsin undertook multiple initiatives to enhance the policy process for policy owners to facilitate the overall transmission of a comprehensive policy set across the UW System, this work included:

- Presenting on the SYS Policy process to the combined shared governance groups to increase transparency;
- The creation of a “Best Policy Practices” community of practice, where campus policy leaders can meet to share and borrow ideas to develop comprehensive processes on all UW campuses; and
- The distribution of a SYS policy process survey to SYS policy owners at the Universities of Wisconsin Administration to obtain input on current SYS policy practices and improve future policy management efforts.

Below is a list of SYS policy priorities for fiscal year 2025. The policies were identified as high priority due to the policy’s content, the last revision date, or other emergent factors (e.g., changes to federal or state regulation). Institution leadership and Shared Governance Representatives were asked to provide input on SYS policy priorities that should be undertaken by Universities of Wisconsin in the coming year.

Comments were given to UWSA policy owners for final consideration in this plan's development. Our thanks to your staff for their time in developing the attached priorities.

Where possible, the quarter that the policy work is expected to begin is indicated to allow institutions the ability to plan and allocate resources to comment on draft policies. Not all offices were able to project workloads and/or timelines of policy development. As necessary, policy owners will work with the Board of Regents Office to update Regent Policy Documents in conjunction with relevant SYS policies.

The list below is not exhaustive, as other issues may arise as the fiscal year progresses, leading to other policy matters taking precedence. In addition, as part of the Universities of Wisconsin strategic plan, the Office of Enrollment & Student Success conducted a review of all SYS and Regent policies with an eye to identifying policies that created barriers, challenges or concerns that impact enrollment, student success or the student experience with a goal of making policy improvements. That work will be completed this summer and a report is expected to be distributed by early fall. Finally, policy owners were asked to include policies that will require revisions in response to the Administrative Transformation Program (ATP) and the implementation of WorkDay in their priorities, it is likely that additional policies will be identified closer to the start of that initiative.

To stay abreast of when draft SYS policies are available for comment or when a SYS policy or procedure has been approved, view the newsfeed stories on the [UW Policies webpage](#).

Fiscal Year 2025 Policy Priorities (by area)

Operational (000 Series)

- SYS 1, *Development, Revision, and Approval of UW System Administrative Policies, Procedures, & Guidelines* **[Revise, Q2]**
- SYS 1.X, *UW System Administrative Standards Template* **[New, Q2]**

Academic and Student Affairs (100 Series)

- SYS 102, *Policy on University of Wisconsin System Array Management: Program Planning, Delivery, Review and Reporting* **[Revise]**
- SYS 110, *Criteria and Approval of Wisconsin Technical College Liberal Arts and Pre-professional Transfer Program* **[Revise]**
- SYS 115, *Associate Degree Standards* **[Revise]**
- SYS 121, *Professional Licensure Programs- Determining Student Location* **[Revise]**
- SYS 135, *UW System Undergraduate Transfer Policy* **[Revise]**
- SYS 135.A, *Guaranteed Transfer* **[Revise]**
- SYS 136, *Required Disclosures for Participation in Certain UW System Services and Programs* **[Revise]**
- SYS 138, *Award of Credit by Prior Learning Assessment* **[Revise]**
- SYS 138.A, *Award of Credit by Prior Learning Assessment (PLA) Procedure* **[Revise]**
- SYS 140, *UW System Guidelines for Articulation Agreements Between UW System Institutions and WTCS Districts* **[Revise]**
- SYS 147, *Admission and Delivery of Services to International Students and for the Employment and Delivery of Services to International Faculty and Academic Staff at UW Institutions* **[Revise]**
- SYS 170, *Lawton Undergraduate Minority Retention Grant Program* **[Revise]**
- SYS 185, *Awarding of UW System Credit in Wisconsin Schools* **[Revise]**

Human Resources (200 Series)

- SYS 205, *Employment of Student Help* [Revise, Q1]
- SYS 206, *Student FICA Exemptions* [Revise, Q1]
- SYS 210, *Educational Assistance for Faculty & Staff* [Revise, Q1]
- SYS 220, *Affirmative Action Data Collection* [Revise, Q3]
- SYS 236, *Utilization of Independent Contractors* [Revise, Q1]
- SYS 237, *Utilization of Borrowed Employees/Employee Interchange Agreements* [Revise, Q1]
- SYS 240, *Relocation (Household Moves) and Temporary or Indefinite Work Assignments* [Revise, Q4]
- SYS 2xx, *Gender Data and Non-Discrimination* [New, Q1]

Financial Administration (300 Series)

- SYS 304, *Fiscal Misconduct* [Revise, Q1]
- SYS 304.A, *Fiscal Misconduct: Reporting and Review Process* [Revise, Q1]
- SYS 312, *Official Functions* [Revise, Q2]
- SYS 326, *Collections and Write-Offs* [Revise]
- SYS 328, *Memberships* [Revise]
- SYS 330, *Prizes, Awards, and Gifts* [Revise, Q1]
- SYS 334, *Accountability for Capital Equipment* [Revise, Q1]
- SYS 351, *Purchasing Card Compliance Policy* [Revise, Q2]
- SYS 351.A, *Purchasing Card Procedure* [Revise, Q2]
- SYS 399.1, *Storage of Supporting Documentation for Financial Transactions* [Revise]

Travel (400 Series)

- SYS 405, *Travel & Expense-General Travel & Expense Policy* [Revise, Q3]
- SYS 410, *Purchase & Payment of Business Air Travel* [Revise, Q3]
- SYS 415, *Purchase & Payment of Lodging* [Revise, Q3]
- SYS 420, *Travel & Expense- Meal and Incidental (M&IE) Per Diem Allowance Reimbursements* [Revise, Q3]
- SYS 425, *Use of Personal Vehicles, Rental Cars, and Fleet for Business Transportation* [Revise, Q3]
- SYS 430, *Travel & Expense- Purchase & Payment Miscellaneous Travel Expenses* [Revise, Q3]
- SYS 435, *Headquarter City & UW System Sponsored Events Policy* [Revise, Q1]

Procurement (500 Series)

- SYS 520, *Board of Regents Procurement Authority* [Revise, Q1]
- SYS 525, *Procurement: Contracts Threshold* [Revise, Q1]
- SYS 530, *Procurement: Prohibited Contract Types* [Revise, Q1]
- SYS 532, *Procurement: Unauthorized Contracts* [Revise, Q1]
- SYS 534, *Procurement Disputes* [Revise, Q1]
- SYS 535, *Public Records and Procurement Contracts* [Revise, Q1]
- SYS 545, *Procurement: Consortiums and Collective Purchasing* [Revise, Q1]

Risk Management & Compliance (600 Series)

- SYS 625, *Youth Protection and Compliance* [Revise, Q3]
- SYS 6xx, *Records Retention Policy* [New, Q1]

Tuition and Fees (800 Series)

- SYS 805, *Tuition and Fee Policies for Credit Instruction* [Revise, Q1]
- SYS 820, *Segregated University Fees* [Revise, Q1]

Capital Planning & Budget (900 Series)

- SYS 910, *Leasing* [Revise]

Information Security (1000 Series)

- SYS 1000, *Information Security: General Terms and Definitions* [Revise, Q3]
- SYS 1037, *Information Security: IT Disaster Recovery* [Revise, Q1]
- SYS 1039, *Information Security: IS Risk Management* [Revise, Q1]
- SYS 1041, *Information Security: Logging and Monitoring* [Revise, Q2]
- SYS 1042, *Information Security: Threat and Vulnerability Management* [Revise, Q2]
- SYS 10xx, *Information Security: Bring Your Own Device* [New, Q3]
- SYS 10xx, *Information Security: Secure Software Development* [New, Q1]

University Personnel System Operational Policies (1200 Series)

- SYS 1210, *Vacation, Paid Leave Banks and Vacation Cash Payouts* [Revise, Q3]
- SYS 1211, *Personal Holiday and Legal Holiday Administration* [Revise, Q3]
- SYS 1275, *Recruitment Policies* [Revise, Q1]
- SYS 1277, *Compensation* [Revise, Q3]
- SYS 1292, *Workplace Conduct Expectations* [Revise, Q1]
- SYS 1293, *Mandatory Employee Training* [Revise, Q1]
- SYS 12xx, *Volunteers and Employee Volunteerism* [New, Q1]

Intellectual Property (1300 Series)

- SYS 1310, *Copyright of Instructional Materials and the Sharing of Course Content* [Revise, Q1]
- SYS 1315, *Patents and Inventions* [Revise, Q1]

FY 2025 Institution Policy Distribution Dates

July 19, 2024

August 23, 2024

September 20, 2024

October 25, 2024

November 22, 2024

December 20, 2024

January 24, 2025

February 21, 2025

March 21, 2025

April 25, 2025

May 23, 2025

June 20, 2025

Please distribute this memorandum to other individuals at your institution who work with these policies. Any thoughts or suggestions should be directed to Sarah Ebben, Policy Analyst (sarah.ebben@wisconsin.edu).

cc: Jay O. Rothman, President
Cabinet
Stacey Rolston, Senior Associate Vice President, UW-Shared Services
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University Staff Representatives
Student Representatives

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