

Practice Directive Manual

Practice Directives Definition:

Practice Directives (PD) are guiding principles at the departmental level. PD's are only created when a Presidential approved policy is not in place to provide sufficient guidance on decision making.

The objective of the Practice Directive Manual is to standardize the policy governance of the university. This Manual should be used to ensure that each University Practice Directive is applicable, current, and includes information outlined in the Practice Directive Format Manual.

Distinguishing between Practice Directives & Procedures

The distinctions between Practice Directives and Procedures can be subtle, depending on the level of operations described in the statements. In the tables below, you will find characteristics that can help discern Practice Directives from Procedures. They are:

Practice Directives	Vs.	Procedures
<ul style="list-style-type: none">• Are non-negotiable		<ul style="list-style-type: none">• Narrow application
<ul style="list-style-type: none">• Change infrequently		<ul style="list-style-type: none">• Prone to change
<ul style="list-style-type: none">• Are expressed in broad terms (Transparency)		<ul style="list-style-type: none">• Often stated in detail
<ul style="list-style-type: none">• Are statements of what and/or why.		<ul style="list-style-type: none">• Statements of "how," "when" and/or sometimes "who"

***Procedures may sometimes be labeled as guidelines.**

Steps for completing Business Practice Directives:

The following steps are recommended for accomplishing this task. The **Department Contact** will revise their Department's Practice Directives before submitting them to the University Compliance and Policy Coordinator [Andrea Whipple \(whipplea@sfsu.edu\)](mailto:whipplea@sfsu.edu).

1. The Department Contact reviews each Practice Directive administered by their Department and determines whether it is a Practice Directive or a Procedure.

2. For documents that are identified as a Practice Directive:
 - a) Determine if the Practice Directive is current and still applicable;
 - b) Review each current Practice Directive and determine whether it requires minor changes or is acceptable in its present form, or is outdated and/or requires content revision;
Minor changes include, but are not limited to:
 - Ensuring that position titles are updated with incumbents of those positions.
 - Updating position titles and department names as appropriate.
 - Removing references to specific room numbers, phone numbers, buildings, etc.
 - Citing authority references such as University Executive Directive (UED), Executive Order#, Coded Memo#, ICSUAM section, Delegations of Authority, etc.
 - c) For Practice Directives that need minor changes or that are acceptable under present form:
 - Practice Directives should be updated and then submitted to the University Policy Coordinator for review.
 - Once the Business Practice Directive is approved, the University Policy Coordinator will upload the information onto the Policies website.
 - d) For documents identified as a Practice Directive that need to be rewritten or have new or updated information added:
 - Refer to the Practice Directive Format Manual to ensure that all relevant information is included.
 - Practice Directive changes and/or additions should be reviewed or made in collaboration with appropriate campus constituents and affected departments.
3. For documents that are identified as Procedures:
 - The Department Contact will be responsible for posting Procedures to their Department's website and other web pages.

Practice Directive Format

Please include the following information when revising or drafting new campus Practice Directives:

Title: (Practice Directive Title)

Division: (The Cabinet where the Practice Directive was created.)
Department: (The Department where the Practice Directive was created.)
Contact Information: (Position Title/Contact Name/Contact Phone Number/Contact Email.)
Effective Date: (When the Practice Directive was enforced.)
Revised Date: (When the Practice Directive was last edited or revised.)

Authority: Indicate authority references or documents such as University Executive Directive, Presidential Memo#, Executive Order#, Coded Memo#, ICSUAM section, Delegations of Authority, etc.

Objective: What the Practice Directive will accomplish.

Statement: The **body content** of the Practice Directive.

Procedures (hyperlink): Procedures that carry out a Business Practice Directive **may** be included as a **hyperlink** at the end of the Business Practice Directive.

Searchable words: Please include at least 3 words or phrases to be used when searching for your policy.

Practice Directive Formatting Instructions

- Practice Directives should be drafted as a Microsoft Word document.
- Each completed Practice Directive should be sent electronically to the University Compliance and Policy Coordinator, Andrea Whipple (whipplea@sfsu.edu), for review.

Glossary

Contact Information: The position Title, Person's Name, Office phone number, and email of the Department Contact for the Practice Directive.

Department: The Department where the Practice Directive was created.

Division: The Cabinet where the Practice Directive was created.

Effective Date: When the Practice Directive was enforced.

Practice Directive: A statement that reflects the values of an organization related to a specific area. A Practice Directive is a governing principle that mandates or constrains actions. For example, a Practice Directive is a widespread application that changes less frequently and is usually expressed in broad terms. It contains statements of "what" and/or "why" and answers major operational issues.

Title: The name of the Practice Directive.

Procedure: Describes how to accomplish a task or reach a goal. The specified actions generally should be followed as they are outlined. For example, a procedure narrows an application and is prone to change. It is often stated in detail with statements of "how," "when" and/or sometimes "who".

Revised Date: When the Practice Directive was revised.