Published on *University of Colorado* (https://www.cu.edu)

CU I&E Submission: Policies as if People Mattered [1]

Who

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What

We're responsible for a typical higher education task: writing policies/procedures that help individuals do their jobs. And for years, we followed a typical higher education approach: getting input from users, advertising new policies, offering periodic policy training. All the right things according to tradition – and then we realized it wasn't good enough.

In 2017, we redesigned a context-rich, engaging policy website—not typical of higher education. We call it Policies as if People Mattered. For the table of contents, we replaced a tedious list of links with appealing graphics/one-line descriptions so users can quickly identify what's relevant to them. For each individual policy page, we crafted consistent learning-enrichment segments: In Brief (2-sentence summary), Quick Look (1-minute video), Procedural Statement (easily managed text in information chunks), Feedback/Questions (immediate input/clarification), Exceptions (what the policy doesn't cover—just as important as what it does!), Related Resources (most relevant links), Test-Your-Knowledge (short learning-retention quiz).

Now, visitors to our policy website are more likely to find what they need—understand what they read—and remember it later.

Why

Most policy users come along after new policies are implemented/advertised. Typically, they have to fend for themselves, facing lists of links with no context, no engagement, no memory-boosting activity. We were in the education business, ignoring decades of educational research about how adults learn and recall information.

Redesigned policy websites are the result of a transformative institutional initiative to help users understand fiscal roles/responsibilities by teaching in brain-compatible ways.

Feedback is highly positive: users enjoy interactivity and immediate feedback/support, they're taking the learning-boosting short quizzes in droves (we launched a coffee gift-card promotion to encourage them to test their knowledge).

Where

Since the Office of University Controller provides guidance to all CU employees and fiscal staff, our innovative policy redesign potentially impacts over 30,000 individuals in the areas of finance, accounting, financial recording, and financial reporting. Given feedback to date, we plan to extend our people-centered approach to additional topic areas (e.g., travel policies and procedures) in the future.

When

The Policies as if People Mattered redesign was first published in limited areas in September 2017. Implementation was expanded to include the entire University Accounting Handbook in February-March 2018.

Additional Materials

Policy/procedure table of contents: https://www.cu.edu/controller/procedures/accounting-handbook [2]

Sample policy/procedure redesigned page: https://www.cu.edu/controller/procedures/accounting-handbook/gift-speedtype-set-control [3]

Source URL:https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-policies-if-people-mattered

Links
[1] https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-policies-if-people-mattered
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[3] https://www.cu.edu/controller/procedures/accounting-handbook/gift-speedtype-set-control