

University Policies and Procedures Style Handbook

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1.0 INTRODUCTION

The University Policies and Procedures Style Handbook provides uniform standards for drafting University Policies and Procedures. Please refer to this Handbook if you are drafting a new University Policy or Procedure Document, or revising an existing one.

In addition to this Handbook, you must use the University Policy and Procedures Templates, which include headings, sections, and other required elements.

This document is meant to guide your drafting. Drafters may depart from this Handbook, in consultation with the Office of University Governance, if there is a principled reason. The Office of University Governance Lead must approve any deviation from the Policy on University Policies and Procedures or Procedures on University Policies and Procedures.

If you have any feedback or questions about this Handbook, please email policy@unbc.ca.

2.0 POLICIES VS. PROCEDURES

University Policies are principle-based statements that must be followed in carrying out the activities of the university. They have a broad application throughout the university and are binding on members of the university community. Policy subject matter is such that it requires Board of Governors, Senate, presidential or vice-presidential review and approval for policy issuance and revision.

University Procedures are the details, processes or set of steps to be followed in order to give effect to a University Policy.

3.0 ORGANIZATION

- Ensure that the Policy’s title is clear and concise, and accurately describes the subject(s) addressed. Write policy titles in **BOLD ALL CAPS**.
- Check that the policy’s classification is correct.
- Check that the policy has the proper Authorities and Officers assigned to it (refer to the [University Act](#) and the Policy on University Policies and Procedures).
 - ▶ Is the level of the Authorities and Officers correct for the document’s subject matter?
 - ▶ Is there a proper delegation of authority, if applicable?
 - ▶ If you are unsure about the appropriate Authorities or Officers, please contact the Office of University Governance Lead.
- Check the Mandated Review date. Some policies and procedures may have a mandated review period of less than seven years, which should be explicitly stated in the document.
- The Effective Date, Supersedes, Date of Last Review/Revision, and Mandated Review dates include the month and year only, and not the day, unless it is necessary to include the day (for example, there is a legislated effective date or review period).
- For Policies, the Associated Procedures section lists the Procedures that are enacted under the Policy. No other documents (appendices, guidelines, forms, etc.) are included here unless they are in the form of a Procedure.
- For Procedures, the Parent Policy section lists the Policy that enacts the Procedures. No other documents (appendices, guidelines, forms, etc.) are included here unless they are in the form of a Policy.
- Under the “Definitions” section (if using), begin with the sentence “For the purposes of this policy or these procedures, the following definitions apply.”
- Defined terms are written with the first letter of each word capitalized and the rest of the letters written in lower case. **Bold** and underline the defined terms.
- When defined terms are used in the rest of the policy, they are written in with the first letter of each word capitalized and the rest of the letters written in lower case.

4.0 CONTENT

- Ensure that the purpose of the Policy and Procedures are clearly stated.
- Ensure that definitions are clear, concise, and consistent. Definitions only contain the meanings of words, and must not include policy statements. Define terms that:
 - ▶ require clarification;

- ▶ could be interpreted as something other than what is intended;
 - ▶ have special meanings;
 - ▶ may be unfamiliar to the intended audience; and/or
 - ▶ are technical.
- Ensure the policy or procedures reflect current practice.
 - Ensure that the policy clearly sets out the relevant responsibilities, including which position or unit/office is responsible for managing each of the actions that the policy requires.
 - Ensure that the policy or procedures comply with applicable laws, and with other university policies. Do not re-state the law when drafting a policy.
 - Keep the policy as brief as possible. An average policy is between one and four pages in length. Detailed or complex information is best included in the associated procedures or as an appendix.
 - Consider the audience when deciding what information is essential.
 - Where possible, prefer general statements over naming specific items. To list is to limit.

5.0 FORMATTING

- If the DOCUMENT is in draft form, include a “DRAFT” watermark on the document. Remove it from the final copy of the document once it is approved.
- The document footer includes the following:
 - ▶ the document number, aligned to the left-hand side of the page (assigned by the Office of University Governance once approved).
 - ▶ the date the document is approved (updated by the Office of University Governance once approved), aligned to the middle of the page
 - ▶ if the document is in draft form, the document version number aligned to the middle of the page
 - ▶ the page number, aligned to the right-hand side of the page.
- Set document margins to:

Top:	0.5”	Bottom:	0.38”
Left:	0.75”	Right:	1.0”
- Use Arial 16 point font for the Policy title and headings.
- Use Arial 12 point font for all text.
- Use single line spacing.

- Use 12 pt. spacing between paragraphs.
- Use 12 pt. spacing between list elements.
- Use one space between a period and the next sentence.
- Start each Section with the section number and name, indent the text so that the text begins in a straight line under the section title.
- For the first, second, and third level subsections, use tabs 0.5” apart from each other. Use the “hanging” indentation setting so that text lines start in the same place (in Microsoft Word, click: Paragraph, and select “Hanging” from the Indentation: Special drop- down box). Hanging indentation is 0.5”. For the fourth level subsection, use a tab that is 2.5” apart from the third level subsection. Use the following numbering convention:
 - ▶ Sections: 1.00, 2.00, 3.00...
 - ▶ First level subsections: 1.1, 1.2, 1.3...
 - ▶ Second level subsection: 1.1.1, 1.1.2, 1.1.3...
 - ▶ Third level subsection: i, ii, iii...
 - ▶ Fourth level subsection: a, b, c...
- Align text to the left, with a ragged right margin. Do not use “justified” text (evenly distributed between the left and right margins).
- Use navigation headings / bookmarks to make hyperlinking and document organization easier.
- Use the “Format Painter” function to transfer a numbering scheme from one paragraph to another. This can solve some issues with Microsoft Word not properly formatting the paragraph numbers, and is particularly useful when making subsections.
- Use numbered lists to break down thick sections of text into sub-points.
 - ▶ End each list item with a semicolon (;), except for the final item which ends with a period.
 - ▶ Do not use bulleted lists, as it is cumbersome to refer to individual bullets.
- Insert hyperlinks to other policies and procedures, including hyperlinks to specific pages of a document. Include hyperlinks to external documents where relevant (E.g. legislation).
- Use the “Insert Cross-reference” function when referring to other sections of the same document. When paragraph numbers change, cross-references can easily be kept up to date by selecting all document text (Ctrl + A) and hitting the F9 key (Update Fields).
- Use the “Paragraph>Line and Page Breaks>Keep with next” command to fix orphaned headers and other undesired page breaks.

6.0 SENTENCE AND SECTION STRUCTURE

- Each section usually has one main idea. Avoid “walls of text” wherever possible by breaking

up longer sections into multiple subsections.

- Use single idea sentences and avoid complex sentence structures.
- Use the active voice whenever possible.
- The passive voice may be used where the performer is unknown, irrelevant, obvious, or less important than the action being performed.
- Passive voice may also be used when the recipient is the main topic of the sentence, rather than the action.
- Do not use the passive voice to be obscure or non-committal about who is responsible for something.
- Use present tense when possible. Avoid using the future tense.
- Check for run-on sentences. If any are found, break them up into multiple sentences or use a numbered list.
- References to other policies or procedures are written as follows: Name of Policy/Procedures (Document # with a hyperlink to the policy or procedures document)

7.0 SPELLING, GRAMMAR AND WORD CHOICE

- Write in plain language. Avoid technical terms, jargon, and Latin – use everyday English equivalents.
- Proofread for spelling and grammar. Spell checking software is useful, but it does not detect every error.
- Use Canadian English spellings.
- Use gender-neutral and inclusive language.
 - ▶ It is okay to use the singular third-person “they” or “their” as a gender-neutral pronoun.
- Use consistent language and terminology throughout the policy and procedures. Avoid terms that have multiple meanings or that may be easily confused or misinterpreted.
 - ▶ If inconsistency in language or terminology is unavoidable, differentiate between these words in the definition section, if the policy requires using both of them.
- Use the Oxford (serial) comma when listing three or more things in series – e.g. “One, two, and three.”
- When referring to the University of Northern British Columbia, write “University.”

- Use the formalized spellings of words rather than abbreviations (E.g. Vice-President, Finance and Administration”, rather than “VPFA”).
- When a long title is mentioned multiple times, include a shortened version in round brackets following the first mention of the title. For all subsequent mentions, use the abbreviated title.
 - ▶ E.g. the Technical Policy Review Committee (the Committee)
- Avoid using “shall.” Use “must” instead.
- Avoid using “should”. Compliance with policies and procedures is mandatory.
- Avoid using contact information that may change, such as a person’s name, phone number, room number, or email address. Where possible, use office names rather than position titles (E.g. “Office of Research and Innovation” rather than “Director, Research and Innovation”).

8.0 LEGISLATION

- When first mentioning a piece of legislation, use the legislation’s full name in italics (E.g. *University Act*). You may include a non-italicized acronym in brackets following the legislation’s title, e.g. *Freedom of Information and Protection of Privacy Act* (FIPPA).
- If you use an acronym, then for each subsequent reference to this legislation you may use the non-italicized acronym instead of the full title.
- Include section numbers if appropriate, using the abbreviation “s.” (E.g. *University Act*, s. 61).
- When listing legislation in the “Relevant Legislation” section, use the full title and citation (e.g. *University Act*, RSBC 1996 c 468) and hyperlink to the full text of the legislation.
- When hyperlinking to legislation, link to the current version of the legislation on BCLaws (for BC legislation) or Justice Laws (for Federal legislation).