



# User Guide to Writing Policies

## INTRODUCTION

- ✓ Administrative policies align operations, set behavior expectations across the university system and communicate policy roles and responsibilities.
- ✓ You, as the policy owner or writer, have the important task of reaching your intended audience with policies that are clear, easily read, and provide the right level of information to the individuals specifically affected by the content. If users understand a policy, they are more likely to follow it and incorporate it into their daily work.
- ✓ There is a standard [policy template](#) that organizes the information in such a way that is consistent across all administrative policies. This guide provides explanations and guidelines for each of the policy sections to make it easy to begin drafting your policy.
- ✓ The Office of Policy and Efficiency (OPE) staff are here to support you in your effort, whether to provide writing assistance, review drafts, or guide you through the full policy development, review, and maintenance process.



## GETTING STARTED

### Overall guidelines for writing an administrative policy

- **Use language that reflects the policy’s intent**

Select the words carefully. Words like “should” and “may” imply a choice. For example,

*"Faculty and staff should not smoke in class".*

This means they shouldn't smoke but will be allowed if they do. The statement also does not address restrictions applicable to students.

Examples of alternative phrasing would be:

*"Faculty, staff and students are prohibited from smoking in class." (better, but only addresses a class setting)*

*"Smoking is not allowed inside University buildings." (best)*

- **Use as few words as possible to state a case.**

For example,

*" All University faculty and staff, under the leadership of its officers, are obligated to ensure that University funds are used only for mission-related purposes"*

This statement implies that only those "under the leadership" are required to follow the policy. An alternative to the above statement is:

*"Employees must ensure that University funds are used only for mission-related purposes."*

- **Ensure that clarifying a statement did not alter its meaning.**

For example,


*" All faculty and staff must ....."*

The word “all” is redundant. Simply stating "Faculty and staff" implies all unless an exception is also written.



STANDARD POLICY TEMPLATE

The standard University Policy Template contains a variety of sections that need to be completed when writing a policy. Below are descriptions of each section as well as tips, samples and more.

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**ADMINISTRATIVE POLICY STATEMENT**

**1** Policy Title: Insert Title Here

**2** APS Number: Pre-Assigned Number by OPE      APS Functional Area: **i.e. ACADEMIC**

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**3** Brief Description:                      Insert brief summary and purpose of the policy here.

Effective:                                      Insert date policy or revision to take effect.

Approved by:                                Current President (Pending)

Responsible University Officer:        Insert title only of responsible university officer here.

Responsible Office:                        Insert name of responsible office/department here.

Policy Contact:                             Insert primary policy contact information here.

Supersedes:                                Insert title(s) and date(s) of superseded policies or show as not applicable with "N/A".

Last Reviewed/Updated:                Insert date policy was last reviewed or last updated here.

**4** Applies to:      Specify who the policy applies to here.

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**5** Reason for Policy: Insert brief reason for policy here. (For example - to comply with state or federal law; or to implement Regent Law.)

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**6** I. INTRODUCTION

**7** II. POLICY STATEMENT

**8** III. DEFINITIONS

**9** IV. RELATED POLICIES, PROCEDURES, FORMS, GUIDELINES, AND OTHER RESOURCES

- A. Administrative Policy Statements (APS) and Other Policies
- B. Procedures
- C. Forms
- D. Guidelines
- E. Other Resources (i.e., training, secondary contact information)
- F. Frequently Asked Questions (FAQs)

**10** V. HISTORY

- Adopted:
- Revised:
- Last Reviewed

**11** VI. Key Words

## KEY ELEMENTS OF THE STANDARD POLICY TEMPLATE

### 1. Policy Title

#### Key points to follow when determining the title of an administrative policy:

- The title must identify the key purpose of the policy, in as few words as possible.
- The title may include verbs to either show separation from another closely titled policy, or to indicate which portion of the topic will be covered by the policy.

*Example: Program Discontinuance vs. Program Discontinuance When No Tenured or Tenure-track Faculty Face Dismissal*

### 2. APS Number and Functional Area

The APS number is assigned by OPE. Definitions of the functional areas may be found on the following link:

<https://www.cu.edu/ope/policy/aps-functional-area>

### 3. Brief Description

A short summary of the policy; specific details should not be included.

### 4. Applies To

#### Specify who the policy is targeting.

- All University Employees
- All Campuses
- Faculty
- Officers
- University Staff (e.g., Exempt Professionals)
- Students
- Classified Staff

### 5. Reason for Policy

#### What to include

The information in this section answers the question as to why the policy exists. Key areas that may be addressed include:

- legal or regulatory reasons
- description of conflict or problem the policy will resolve
- overall benefits

If there is a state or federal law with which this policy is aligned, it may also be specifically referenced in this section. If several laws are touched by topics contained within the policy, this list of references is better moved to the related information section.

### **What not to include**

This section should not include the history as to how the policy was developed nor should it contain any procedural steps.

## **6. Introduction**

An explanation of the steps that were taken to develop the policy. For example:

- Faculty involvement (EPUS, Faculty Senate)
- Specific staff input
- Student involvement

## **7. Policy Statement**

### **What to Include**

This is the most important section of the administrative policy. It will provide specific direction for the intended audience. Questions that are typically answered through the policy statement include:

- Who is the primary audience? (Who needs to follow the policy?)
- In what situation(s) does this policy not apply?
- What are the major conditions or restrictions?
- What is expected of the employee or student?
- Are there exclusions or special situations?

Here are rules for the policy owner/writer to follow when drafting the policy statement:

- Sentences and paragraphs must be clear and understandable for the given audience.
- Acronyms may be used if spelled out completely the first time the phrase is used (e.g., principal investigator {PI} or National Incident Management System {NIMS}).
- Use strong action words (will, must, are responsible for, etc.). Do not use “shall” in the policy statement.

### **What Not to Include**

The policy statement should not include background details on the policy nor should it contain procedural steps. Avoid using a specific label, such as the name of a software product. Generic terms are more sustaining and require less maintenance.

*Example: use ‘enterprise financial system’ vs. PeopleSoft Financials.*

## 8. Definitions

List unique terms that, by being defined, would add to the reader's understanding of the basic policy.

- Define unfamiliar or technical terms
- Define terms with special meanings

General terms that are included in the Administrative Policy Glossary should be italicized.

## 9. Related Policies, Procedures, Forms, Guidelines, and Other Resources

List information that supports the specific policy in this section. These documents may be internal or external to the University, such as references to state or federal laws.

- **Administrative Policy Statements (APS) and Other Policies**
  - The title and date of the referenced APS should be listed.
  - When referring to an associated Regents Law or Policy, list the number and title.
  - List the title and effective date of other administrative/academic policies that relate to the specific policy.
  - Final reports or other key background documents need to have the title and effective date listed.
- **Procedures**
  - The specific procedure titles should be listed here. Efforts must be made to ensure that the links work for the end users.
  - Procedures should be listed in the order in which they are carried out. If there is no particular order, procedures will be listed alphabetically.
- **Forms**
  - Links to University-wide forms used in following this policy will be displayed here. Necessary forms that are hosted on another site, such as a federal or state website, may also be listed.
  - Forms will be listed by title.
- **Guidelines**
  - These may include University, State or Federal Guidelines that are specific to this policy.
  - List the Guidelines by title.
- **Other Resources**
  - The list of related information will be displayed in an order defined by the policy owner, typically in order by importance or level of involvement in the policy.
- **Frequently Asked Questions (FAQ)**
  - No matter how well some policies are written, there will always be some questions based on individual interpretation. This section provides for the most common questions and their respective answers.



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## 10. History

This is a record of significant changes by date, for the specified policy. The Office of Policy and Efficiency will provide a summary of initial and revised dates for the policy after consulting with the policy owner, as needed.

## 11. Key Words

Include a list of related terms or phrases both found and not found in the APS, which others might use to search for this policy – i.e., cell phones to find wireless telecommunications equipment. Separate the words or phrases with commas.

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