



Dixie State University

Policy Writing and Formatting Guidelines

Using the DSU Policy Template

This section instructs writers on general policy template language

Official Policy Template: All policy drafts and addendum drafts must be submitted on DSU's official policy template. Download the official policy template at dixie.edu/policylibrary.

Owner(s) and Policy Steward(s)

Both owner(s) and steward(s) should be identified in the early stages of composing the document as they are the drafters of the policy. For assistance in identifying appropriate policy owner(s) and policy steward(s), contact the Policy Steering Committee at policies.dixie.edu.

Title and Policy Number

Policy titles should reflect the major content or policy within the document. Policy numbers should reflect the division/area that oversees the major content within the policy:

- 100 Administration
- 200 Financial Affairs and Development
- 300 Human Resources
- 400 Facilities, Operations, and Information Technology
- 500 Students
- 600 Academics
- 700 Graduate

The Compliance Office and the Policy Steering Committee, in consultation with policy owner(s) and steward(s), are responsible for assigning policy numbers.

Approval Date(s)

The policy approval date is the date the Board of Trustees approves the policy. All approval dates are added when the final, BOT approved version of the policy is uploaded into the Policy Library. Approval dates are located in the policy template's "History" section (see last page of the policy template).

Approval Date(s) Writing Tip

- ✓ In the drafting stages, use the semester and year of the request, i.e., "Spring 2020," in place of an approval date. **Example:**

History
Approved: 00/00/00
Revision: Spring 2020

Guide to Policy Sections

This section instructs writers on how to compose content for each major policy section

- **Section I. Purpose:** The “Purpose” section provides the rationale for the policy. Purpose statements should be written in complete sentences. Here are a few components to consider when writing this section:
 - Clearly define the policy’s objective(s)
 - Reflect the University’s mission, values, and strategic directions
 - Address legal mandates associated with University, State, or Federal regulations
 - Resolve conflicts or problems
 - Include financial, operational, and/or technological needs associated with the policy. Financial notes should be coordinated through the Institutional Planning and Budget Office.
- **Section II. Scope:** The “Scope” section addresses the scope of the policy, including names of policy stakeholders, departments, and/or areas impacted by the policy. When writing about scope, consider including these points:
 - State how the policy affects the University
 - Reference stakeholders by positions, not by personal names.
Example: University President, not Richard B. Williams
- **Section III. Definitions:** The “Definitions” section should define key policy terms. Key terms include the following types of words or phrases:
 - New, uncommon, and/or specialized terms
 - Terms that may have different meanings in different contexts

Definitions Writing Tips

Define and format key terms according to these guidelines (for more on style and formatting see pages 5-6):

- ✓ List in alphabetical order
- ✓ Define the word or phrase using complete sentences
- ✓ Bold and italicize the word being defined, then follow with a colon and the definition of the word

Example:

Approval date: The approval date is the date a policy proposal draft is approved by the Dixie State University Board of Trustees.

- **Section IV. Policy:** The “Policy” section contains the statement(s) of policy. Policy statements are the governing principle, plan, or understanding that guides the action. Policy statements govern what to do, but not how to do it. Questions to consider when writing the policy statement section:
 - Does the statement accomplish the purpose of the policy?
 - Does the statement clearly articulate what the policy is and what the policy is meant to accomplish?
 - Does this section contain only policy (not procedures)?
 - Are the responsibilities for entities or individuals clearly stated?
 - Is the policy section consistent with applicable laws, regulations, and policies listed in the reference section?
- **Section V. References:** The “References” section lists related Federal and State Regulation and Court Rulings; Utah State Board of Regents’ policies; University policies; Division and/or College rules, regulations, procedures, and guidelines; Department and/or program rules, regulations, procedures, and guidelines; and/or any other applicable regulations.

References Writing Tips

Citing Sources

- ✓ Order references alphabetically, then numerically
- ✓ Cite any Federal and State Regulation and Court Rulings; Utah State Board of Regents’ policies; University policies; Division and/or College rules, regulations, procedures, and guidelines; Department and/or program rules, regulations, procedures, and guidelines; and/or any other applicable regulations cited in the policy
- ✓ Include the full name of the law/policy, volume number, page number, and/or year of the law, including where to locate the referenced work

Example: Utah State Board of Regents Policy R321, 4.2.3

Section VI. Procedures: The “Procedures” section prescribes the means of implementing and complying with the policy. Procedures articulate how the policy will be implemented.

Procedures Writing Tips

- ✓ Check that specific actions and/or steps comply with DSU policy
- ✓ Check procedures for consistency with applicable laws, regulations, and policies listed in the reference section
- ✓ Correlate appropriate procedures with the policy statement(s)

- **Section VII. Addenda:** The “Addenda” section may be used to provide supplemental information, including procedures and/or other related documents. Changes to the Addenda require Board of Trustees’ approval.
 - Addenda changes, including a new, revised, or retired addendum draft should be submitted on the official DSU Policy Addenda Template (located on the DSU Policy Website).
 - When revising an addendum, use DSU revision markup language (See Revision Markups on p. 5)
 - Hyperlinks may be used in the Addenda section; however, the policy owner and/or the policy steward is responsible for ensuring hyperlinks remain up-to-date and active.
 - The Policy Steering Committee will assign each addendum a letter in the alphabet that corresponds with the parent policy:
 - Example: 601a, 601b, 601c, etc.

Additional Writing Tips

- ✓ Use position titles (e.g., Vice President for Academic Affairs) rather than naming individual employees.
- ✓ Use words rather than symbols (i.e., ampersands) and/or acronyms in the policy title
- ✓ Use Acronyms correctly: Spell out the full compound term at the first occurrence of the term in each section or on each page, (whichever is longer), followed by its acronym
- ✓ Avoid inserting hyperlinks, which need to be monitored and reviewed by the Policy Owner for accuracy on a regular basis
- ✓ Do not omit sections from the policy template. If a section is not necessary, add “N/A” next to the section title.

Example: References: N/A

Formatting and Submitting Policy Drafts

This section covers formatting of text, wording, fonts, margins, and how to include revision markings (or red lines) in revised policy drafts

The official policy template, located in the DSU Policy Library, conforms to the following style and formatting guidelines:

Abbreviations and Latin Phrases

Etc.: can only be used when the unmentioned items are of the same type as the items mentioned earlier. Incorrect: crayons, blankets, birth certificates. Correct: vegetables, fruits, etc.

Font

Title: Palatino Linotype, 18 pt.

Headings: Palatino Linotype, 12 pt. bold

Body Text: Palatino Linotype, 12 pt.

Margins

1-inch margins on all sides

Paragraphs

Left justified (i.e., left aligned with a ragged right edge)

Revision Markups

- ✓ ~~Strikethrough and highlight for deletions to policy language~~
- ✓ Red font for revised and additional language (language that changes the intent of the policy and requires BOT approval)
- ✓ Blue font for new editorial and template language (language that does not change the intent of the policy and does not require BOT approval)

Spacing

Default tab: stops at .25

Punctuation: Single space after punctuation; serial comma

Line spacing: Single space

Paragraph and sections: one blank line above and below paragraphs

Voice and Intent

- ✓ Use third person
- ✓ Use terms that accurately convey the intention of the policy
- ✓ Be careful about using absolute terms (shall, must, will, all, etc.) versus conditional terms (could, may, some, etc.)
- ✓ Do not put unreasonable obligations or duties on the institution or the members of

the institution. For example, the institution cannot “ensure” an environment free from sexual harassment

- ✓ Use inclusive language, avoiding the use of gendered pronouns such as he/she.

Policy Requests, Policy Drafts, and Policy Addenda may be submitted on the DSU Policy Website at Dixie.edu/policylibrary: Use the “Policy Request Form” located on the Policy Library’s website. Upload a markup copy and a clean copy. The only exception to submitting a mark-up draft is if the policy is new.

1. **Mark-up copy:** The original policy with revision marks and a draft watermark
2. **Clean copy:** The proposed policy with a watermark, but without revision marks

Additional Formatting Questions:

For formatting and style questions not addressed in this style guide, refer to the current edition of the *Chicago Manual of Style* or contact the Policy Steering Committee (PSC) at policies@dixie.edu.

Note: Policies and addenda not formatted on the official policy template and policy addenda template may be returned to the policy owner before moving forward through the approval process.

History:

Revised September 27, 2021