



# Style Guide for Policies & Procedures

## Contents

Introduction ..... 1

Policies vs. Procedures..... 1

Organization ..... 2

Content ..... 3

Formatting..... 3

Sentence and Section Structure..... 5

Spelling, Grammar, and Word Choice..... 6

Special Rules for Legislation ..... 7

## Introduction

This style guide provides uniform standards for drafting university policies and procedures. Refer to this guide if you are drafting a new university policy or procedure, or revising an existing one.

In addition to this guide, you must use the University Policy and Procedures Templates, which include headings, sections, and other required elements. For copies of these templates, please email [policyofficer@uvic.ca](mailto:policyofficer@uvic.ca) or call the University Secretary’s Office.

This document is meant to guide your drafting. Policy drafters may depart from this guide, in consultation with the policy officer, if there is a principled reason for doing so. The University Secretary’s Office must approve any deviation from the [Policy on University Policies and Procedures](#) (“Policy on Policies”), or its procedures.

For examples of policies drafted according to this style guide, please see the Flag Display Policy ([AD2300](#)) or the Printing, Duplicating, and Photocopier Policy ([AD2525](#)).

## Policies vs. Procedures

- ✎ University Policies are principle-based statements that must be followed when carrying out university activities. They have broad application throughout the university; are binding on

members of the university community; and have subject matter that requires Board of Governors, Senate, presidential, or vice-presidential review and approval.

- ✦ University Procedures are the details, processes, or set of steps followed in order to give effect to a university policy.
- ✦ Policies should not contain procedures, and procedures should not contain policy statements unless they are necessary to help readers interpret the procedures.
- ✦ For more information, see [“Briefing Note on Policy Structure and Function”](#).

## Organization

- ✦ Ensure that the policy’s title is clear and concise and accurately describes the subject(s) addressed. Write policy titles in **bold**. Do not write titles in 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 Policies](#)). Is the level of authority correct for the policy’s subject matter? Is there a proper delegation of authority, if applicable?
  - If you are unsure about the appropriate authority for a policy, please contact the University Secretary’s Office.
- ✦ Check the Mandated Review date. Some policies have a mandated review period that is less than seven years – this will be explicitly stated in the policy.
  - the Effective Date, Supersedes, Last Editorial Change, 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).
- ✦ The Associated Procedures section lists the procedures that follow the policy. No other documents (appendices, guidelines, forms, etc.) are included here unless they are in the form of a procedure.
- ✦ Under the “Definitions” section (if using), begin with the sentence “For the purposes of this policy, the following definitions apply” (or equivalent wording). Give this sentence a paragraph number. Do not put a paragraph number next to each individual definition.
  - Defined terms are written in all lower case (unless the term is a proper name, in which case the first letter of each word is capitalized). Definitions are enclosed in quotation marks and bolded. For example:

**“Fraser Building”** means the Murray and Anne Fraser Building that houses the Faculty of Law.
  - When defined terms are used in the rest of the policy they are written in normal text without bolding or quotation marks.

## Content

- ✦ Ensure that the purpose of the policy is 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:
  - (a) require clarification;
  - (b) could be interpreted as something other than what is intended;
  - (c) have special meanings;
  - (d) may be unfamiliar to the intended audience; and/or
  - (e) are technical.
- ✦ Ensure that the policy reflects 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 complies with applicable laws, and with other university policies. Do not attempt to 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.



## Formatting

- ✦ If the policy or procedure is in draft form, include **DRAFT FOR DISCUSSION ONLY** (in ALL CAPS and **bolded**) in the document header. Remove it from the final copy after the policy or procedure is approved. A “DRAFT” watermark may also be used but is not required.
- ✦ The document footer includes the page number, aligned to the right-hand side of the page. If the policy/procedure is in draft form, then the footer also includes the date of the last revision and the version number, e.g.:

April 19, 2017  
v.1  
Page 1 of 4

- ✦ Set document margins to 2.54cm for each margin (top, left, right, and bottom).

- Place the full-colour University of Victoria logo in the top-left corner of the first page of the policy and the first page of every procedure. When first pasted into a document, this logo may be too large; re-size it to measure 1.27cm x 3.28cm. Do not use the old tricolour logo.

This	Not This
	

- Use Arial 11 point font for all text, including titles and headings.
- 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.
- Indent headings and sections so that the text begins in a straight line on the left hand side of the page.
- Use the “hanging” indentation setting so that text lines start in the same place (in Microsoft Word, click: Home>Paragraph, and select “Hanging” from the Indentation: Special drop-down box). Hanging indentation is 1.27cm.
- 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.
- Subheadings are Capitalized and underlined, e.g.:

Confidentiality and Management of Records

28.00 The protection of confidentiality is essential to the functioning of this policy.

- Use the following numbering convention:

- sections: 1.00, 2.00, 3.00, ...
- subsections: 1.01, 1.02, 1.03, ...

(Use “multilevel” list under paragraph setting in Microsoft Word)


- Do not manually type in section/subsection numbers, as this makes the document very difficult to edit.

- 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 alphabetical lists to break down thick sections of text into sub-points.
  - Label lists with lower-case letters enclosed in round brackets, e.g.: (a), (b), (c) ...
  - 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.

## Sentence and Section Structure

- ✚ Each section usually has one main idea. Avoid “walls of text” wherever possible by breaking up longer sections into multiple sub-sections.
- ✚ 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.
- ✚ Check for run-on sentences. If any are found, break them up into multiple sentences or use an alphabetized list.
- ✚ References to other policies are written as follows: Name of Policy (Policy # with a hyperlink to the policy document)  
  
e.g.: Travel and Business Expenses ([FM5610](#))

## Spelling, Grammar, and Word Choice

- ✦ Follow the university style guide, except when it differs from the [Policy on Policies](#) or this drafting guide (e.g. Oxford comma use).
  - ✦ 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 will not detect every error.
  - ✦ Use Canadian English spellings. The [Oxford English Dictionary](#) is the authoritative reference for the spelling and meanings of English words (UVic has an online subscription).
  - ✦ Use gender-neutral and inclusive language.
    - It is okay to use the singular third-person “they” or “their” as a gender-neutral pronoun, e.g. “The grantee is responsible for directing their employees”. **Don’t listen to the haters.** The singular “they/their” has been a part of the English language for hundreds of years<sup>1</sup> and is perfectly acceptable in academic and legal writing.
  - ✦ Use consistent language and terminology throughout the policy. Avoid terms that have multiple meanings or that may be easily confused or misinterpreted.
    - In some cases, due to peculiarities of the English language, inconsistency is unavoidable (e.g., the word “record” means both a physical thing that stores information, as well as the act of creating a record). It may be necessary to 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.” 
- N.B. –** the Oxford comma is not used in APA style, including in most journalistic writing, and you may have been told never to use it. The UVic Style Guide instructs users to omit the Oxford comma. However, **the Oxford comma is essential in legal and policy writing to avoid confusion** about which items of a list are grouped together.<sup>2</sup>
- ✦ When referring to the University of Victoria: write “university”. For conciseness, avoid “University of Victoria”.

---

<sup>1</sup> “their, *adj.* and *pron.*”, Oxford English Dictionary, 3rd ed (2013): <http://www.oed.com/view/Entry/200291>, section A.I.2. See also Letitia Henville, “The politics of pronouns – The singular ‘they’ and your power to choose as an academic writer,” *University Affairs* (Aug 8, 2019): <https://www.universityaffairs.ca/career-advice/ask-dr-editor/the-politics-of-pronouns/>.

<sup>2</sup> For amusing examples of this confusion, see: <https://www.buzzfeed.com/sarahhenrich/15-reasons-why-you-should-use-the-oxford-comma-yr75>; for an example that cost a company \$10 million, see: <https://www.nytimes.com/2017/03/16/us/oxford-comma-lawsuit.html>.

- ✦ Use the formalized spellings of words rather than abbreviations (e.g. “Vice-President Finance and Operations”, rather than “VPFO”).
- ✦ When a long title is mentioned multiple times, include a shortened version in quotations and round brackets following the first mention of the title:

e.g. the Technical Policy Review Committee (“the Committee”).

For all subsequent mentions, use the abbreviated title:

e.g. the Committee will make decisions by simple majority.
- ✦ Do not use “shall”. Use “will” or “must” instead. Choose one of them and use it consistently.
- ✦ Avoid using “should”. Compliance with policy 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 Student Life” rather than “Manager, Student Conduct”).

## Special Rules for Legislation

- ✦ When first mentioning a piece of legislation, use the legislation’s full name in italics (e.g. *Copyright 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).

---

*If you have any feedback or questions about this guide, please email [policyofficer@uvic.ca](mailto:policyofficer@uvic.ca).*