THE OHIO STATE UNIVERSITY

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Helpful Hints for Writing University Policies

Avoid Common Mistakes

Style
- Use the same word to refer to the same concept throughout all documents.
- Use standard outline format (i.e., I. A. 1. a. i.). Do not use bullets or unnumbered paragraphs.
- Do not capitalize "university" except as in "The Ohio State University."
- Do not capitalize job titles (e.g., residence hall director, the president was quoted as saying), except when used with the person's name, e.g. President Drake, Provost McPheron.
- Spell out an acronym the first time, following with the acronym in parentheses and subsequently follow with the acronym.
- Do not use "OSU" – use "Ohio State," "the university," or "The Ohio State University"
- Be consistent in naming the university – all "Ohio State," "the university," or "The Ohio State University"
- Do not use "institution" and "university" interchangeably; use one term consistently.

Grammar
- Use simple rather than compound sentences.
- Use the Oxford comma. Place a comma after the second-to-last item before the conjunction (*and*, *or*, or *nor*) and use a semicolon to separate items in a series when any of the items itself uses a comma. For example, "Units must apply, authorize, and report." "The process consists of benchmarking; testing, remedying, and monitoring; and reporting findings."
- Use parallel construction. Start sentences or sentence fragments using words in similar format. For example, instead of "built a team, raises money" say "builds a team, raises money." Instead of "running, swimming, and exercised" say "running, swimming, and exercising" or "ran, swam, and exercised."

Other considerations
- Write the procedure section in sequential order (i.e., the order that steps must be undertaken by the person to whom the policy applies).
- Do not restate the policy in the FAQ. FAQs should address questions that are frequently raised or that are not addressed in the policy itself.

Be Mindful of the Audience
Because the audience for a policy is generally the entire university community, the language used must be accessible and understandable to all, not just technical experts.
- Writers may assume that readers have basic knowledge of the campus and university community and no knowledge of specific policies or procedures.
- Use clear and precise words, short sentences, and common terminology. If industry terminology or words with specialized meaning must be used, define them in the policy. Be consistent when using technical terms. When multiple words have the same meaning, select one and use it throughout the document.
- The policy should be written on a seventh-grade reading level.
- Use "must" instead of "shall." Be intentional when using "should" – it means that something is not required but merely a suggestion. Keep in mind that most university policies are requirements and not simply statements of best practices.

Use Plain Language
Plain language makes documents more clear, concise, and user-friendly.
- Use active rather than passive voice (e.g., instead of "it is the ultimate responsibility of the unit head to…," use "the unit head must…" or instead of "candidates who are barred from employment should be

notified…'" use "notify candidates who are barred from employment…"). Active voice clearly specifies who performs the actions.
  - Language must be simple and direct, using strong sentence structure. Avoid jargon and qualifiers (e.g., totally, completely, definitely, etc.).
  - Omit unnecessary words (e.g., say "Faculty and staff must…" instead of "All faculty and staff must…"). Refer to the table below.
  - Use proper grammar and punctuation.
  - Use pronouns to help the reader relate to the document (e.g., instead of "Receipts must be provided…" say "You must provide receipts…"). This is also an example of switching from passive to active voice.
  - Use short words (one or two syllables, e.g., "use" not "utilize") and write in short sentences.

General plain language guidance.
  - Keep it simple. Policies are not law and should be written in plain language – not legalese. It should be easily understood by the entire university community.
  - Keep it general. Policies cannot anticipate all possible situations. Because of this, they should be relatively general and clear enough to apply to varied unforeseen circumstances.
  - Make it helpful. The policy should tell the reader why it exists, who it affects, its major conditions and restrictions, when and under what circumstances it applies, and how specifically it is to be carried out.
  - Additional advice can be found at Center for Plain Language website at centerforplainlanguage.org/about-plain-language/checklist/.

Excess Words[1]	Plain Alternatives
accordingly	so
addressees	you
as a means of	to
at the present time	now, currently
constitutes	forms, makes up
for the purpose of	to, for
in accordance with	under
in order to	to
in the event that	if
pertaining to	of, about
related to	of
with regard to	about

Use Gender Inclusive Language

Policies must be written using gender-neutral and gender-sensitive language.
  - Do not use masculine or feminine pronouns as the default; use "they" or "the individual" instead.
  - Avoid using gendered-nouns such as chairman, man, mankind, man-made, etc. Instead use gender-neutral nouns such as chair, coordinator, humanity, individual, machine-made, people, person, synthetic, etc.
  - Accurately express sex versus gender distinctions.
  - Advice can be found at The Writing Center of the University of North Carolina at Chapel Hill website, writingcenter.unc.edu/handouts/gender-inclusive-language/

General Writing Tips and Policy Best Practices

  - Policies align operations, set behavioral expectations, and communicate requirements to the university community.
  - There is a standard policy template for university policies. Departments can create their own governing documents but they must clearly specify that they are a department/unit procedure and should be visually distinguished from university policies.

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[1] Center for Plain Language: Guidelines for Creating Plain Language Materials, centerforplainlanguage.org/5-steps-to-plain-language/

- Policies should be reviewed regularly for current-ness. Feedback and questions should be collected and incorporated into the next revision or into associated policy documents.
- When issues trend (e.g., Internal Audit records systematic failures on a specific policy point, or multiple violations of a policy occur, etc.), it is the responsible office's responsibility to assess the policy and make changes to clearly communicate the requirements.
- Both style (how a document is displayed or formatted) and content (what a document actually says) are important.
- University policies should provide current contact information so users with abnormal/unaddressed situations can seek timely advice on policy interpretation and application. Responsible offices must ensure that those whose contact information is listed in the policy are content experts prepared to answer questions or know who the content expert is and how to put the user in contact with that individual.
- The goal is to ensure compliance with the policy or procedure, so policies must be written in a way that enables users to comply. User-friendly, effective policies with robust resources decrease questions to the responsible office because users are able to find answers and follow policy with little additional assistance.
- Policies must be consistent with the style decisions from Ohio State's Editorial Style Guide. You can also download the Editorial Style Guide.
- Avoid including information that is likely to change frequently (use department and position names, not names of buildings or individuals).

Types of Governance Documents at Ohio State

University Rule, Regulation, or Bylaw
Interchangeable terms used to provide guidance for uniform operation of the university. Provide a detailed framework regarding the organization, administration, and operation of the university, including rules for the faculty, airport administration, classified civil service, physician governance, transportation and parking, university administration, and other matters. Bylaws generally provide a framework for the overall governance of the university and/or establish and define the principal institutions and administrative officers of the university and their roles and responsibilities. Rules, regulations, and bylaws are adopted by the Board of Trustees and become part of chapter 3335 of the Ohio Administrative Code.

University Policy
Provides specific direction for operations, administration, or programs. As a general matter, policies are issued and apply university-wide. Developed through the university policy process, policies enhance the university's mission and operational efficiency, mandate action or constraints, and must be consistent with relevant laws, regulations, bylaws, and rules. Refers to the document generally and is also one of the two major sections (policy, procedure) of the policy template.

Procedures are included in the policy template. Procedures lay out the steps or the process to accomplish the policy. In the template, the procedure section includes the following: an outline of the steps, the responsibilities section (a restatement of all actions identified in the policy divided by responsible office/individual), resources, contacts, and history.

Resources
University policies include a resources section to help readers more fully understand specific issues that may be included in the policy. This includes referencing other university policies or rules, regulations, bylaws, standards/requirements, guidelines, and unit governing documents.

Additionally, responsible offices should consider developing additional tools to facilitate the understanding of university policies. For instance, FAQs list common and recurrent questions and answers, and should not merely restate policy. They are designed to provide a better understanding of university policy or unit operating procedure. When a policy or procedure is revised, the responsible office should consider adding very common FAQs to the policy or procedure.

Standard/Requirement
Establish mandatory expectations and may be set by responsible offices and others. Governing document used as the approved model or to state the baseline required in practice at Ohio State. Are usually developed in

accordance with published federal, state, or industry regulations, requirements, or standards. A standard or requirement may apply university wide or to a particular unit or units.

Unit Governing Document
Provide specific implementation mechanisms for operations, administration, or programs within a particular college/unit or units. Unit governing documents are applicable only to the issuing unit(s), and must prominently specify the unit(s) to which they apply.

Guideline
Provide advice or recommended best practices. They are not mandatory and allow discretion in interpretation, implementation, or use. Guidelines may apply university wide or to a particular unit or units.