

Policy Writing Guide

Introduction

Board of Regents (BOR) level and Administrative (AP) level policies play a crucial role in university operations, setting behavior expectations across the university system, and communicating policy roles and responsibilities.

To ensure consistency across all policies, a standard policy template has been established. This template organizes information in a consistent manner, making it easier for policy owners to draft their policies.

Writing Policy

Policies are clear, simple statements of how the University intends to conduct business. Policies allow the University to identify requirements and define expected behaviors. They also provide a set of guiding principles to help with decision-making.

Policies fall into three categories:

- Policies that enhance the mission of the University;
- Policies that ensure compliance with applicable laws, rules, and regulations; or
- Policies that promote operational effectiveness and efficiencies to reduce institutional risk.

Policy Language

- Policies should be clear and concise and written in the third person.
- Keep the language simple and the sentences short. Since the audience can vary, the best practice is to write for an 8th-grade reading level.
- Words need to be selected carefully. Words such as should and may imply choice.
- Do not use information that may quickly become outdated, such as employee names or names of software products, unless such information is specifically required. For example, certain regulations require an individual to be named as the contact for reporting.

Approved Policy Template

The approved policy template is composed of the following sections.

Policy Title: This should be the official title of the policy. To ensure that policies are named consistently, the subject should come first, with the word “Policy” at the end of the title.

Policy Area: The responsible area is listed in the Policy Development and Management Policy.

Final Approval Authority: Board of Regents (BOR) or Administrative (AP) level approval (including President, Provost/Vice President, Dean/Department)

Responsible Executive: Person/office primarily accountable for the approval of the policy within the university and/or person who will report BOR-level policy to the BOR. The individual who exercises oversight of, and maintains ultimate responsibility for, standards set forth in AP-level policy. Responsible Executives are the President, Provost, Vice Presidents, Executive Officers, Deans, or Department Heads.

Responsible Office: The office, unit, or division designated by the Responsible



Executive(s) to develop and administer a policy, communicate with and train the university community in its requirements, and maintain the accuracy of policy content.

Policy Liaison: The individual who is primarily responsible for coordinating the policy development process and serving as the point of contact for the University Policy Office. (This individual is usually within the Responsible Office.)

Introduction: Describe the policy and its impact to the university. This will be used in the BOR Agenda Item for approval of the final policy.

Definitions: The definition section is optional and may be added to define terms that may not be readily understood by the general reader or specific to the policy.

Policy: This section is crucial as it contains detailed information of the policy. Subheadings can be added within this section to help organize the content effectively. Policy text must adhere to the formatting style illustrated in the example below.

1. Level 1
 - a. Level 2
 - i. Level 3
 1. Level 4
 - a. Level 5

Policy Cover Sheet

The Cover Sheet for the University Policy Office must accompany all new or revised policies submitted for review and approval. It is best to provide a full but concise answer to each question.

Approval Workflow

Policies are generally developed by the Responsible Office to address a need for a specific audience. Policies must be reviewed and approved according to the workflow assigned by the University Policy Office.

1. The Policy Liaison will complete the Policy Cover Sheet and send it to the University Policy Office at policy@ou.edu
2. Policy Liaison will draft the policy in PolicyStat. The University Policy Office will place the stakeholders in the workflow, and the policy promulgation will begin.

Upon approval from the Final Approval Authority, the final policy will be published to the [University of Oklahoma Policy Library](#)

Periodic Review

All policies must be reviewed on a 3-year review cycle to ensure accuracy and relevancy. Policy liaisons will be notified by email 90 days, 60 days, and 30 days prior to the due date.

Tips:

- Check all links to make sure they are still valid.
- Verify that the Policy Liaison and Responsible Executive are correct
- Look for any procedural information that may have changed.