

# Instructions for Completing the Policy Template

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All policy drafts are to be written in Microsoft Word using the standard college policy template that has been developed for use for policies in all areas of the college. The template is available on the website at <http://www.cotc.edu/Discover/Pages/Policy-Resources.aspx>. The template uses standard styles that allow for clean transition from the Word document to the Web. It is important to use the templates and the styles properly to help streamline the review and approval process. When the template is not utilized properly, the document will be returned to the policy owner for corrections, thus slowing the process. In addition to the policy template, please refer to the College Policy Process, policy 1.1.10, available on the Policy Resources webpage available at <http://www.cotc.edu/Discover/Pages/Policy-Resources.aspx>.

The policy template sections are structured using standard outline format. This format helps you keep the policy organized and is easy for the reader to find the needed information.

In general, it is best to stay as close to the standard template as possible. The closer you are to the standard, the easier it will be for users to find the information they need in your policy. However, there are occasions where you may need to add different parts/headings to the policy to increase ease of use. Whenever you add a part/heading to the policy, it should be something that identifies a significant aspect of the policy. Any headings should be descriptive of the information to follow. All of the part headings should be of equal importance within the policy as a whole. No matter how many headings you determine you need to communicate clearly your policy, you should retain the outline structure for all documents developed for the policy. Documents that are submitted in narrative structure may need to be rewritten and reviewed again before starting the formal review process.

For revisions to current policies, use Microsoft Word "Track Changes" to indicate additions or deletions to the text of the revised policy. Do not use colored text or highlighting to indicate additions or deletions to the text of a proposed policy. When submitting the revised policy through the approval process, copies of the policy with "All Markup" utilized should be provided so that reviewers can see all of the proposed changes.

The template document is divided into the following three major parts: Header, Policy, and Procedure. Each component of the template is further described below. The policy template includes an indication as to where each component is required or optional. For those sections that are optional, the policy writer should simply delete unused sections from their document.

## Policy Name

The policy name is the primary means of identifying, locating, and referring to a policy. Do not include "Policy" or "Policy on" in the title of the policy listed in "Policy Name".

Questions to consider when writing a policy name:

- Is the name descriptive enough to reflect accurately the main contents of the policy?
- Is the name easily understood by people unfamiliar with the policy?
- Does it contain words that will be identified in keyword searches?

When naming a policy:

- Avoid using generic first words such as "College", "Policy" or "Procedure".
- Ensure the name accurately reflects the policy or procedure content.
- Ensure the name does not start with words such as "the", "that" or "a."
- Ensure the name is succinct.
- Ensure that related policies have similar names.

## Policy Number

The policy number will be entered by the CCP coordinator.

## Applies to:

Indicate whomever is appropriate (any combination): Faculty, Staff, Students, Student Employees, Administrative Staff, Support Staff, Volunteers, Visitors, Vendors, Guests. When feasible “applies to” should indicate more specific applications such as “anyone operating college owned or operated vehicles.”

## Responsible Office

Office charged with developing, updating, administering, communicating, training, ensuring compliance with, and providing resources to promote adherence to college policies that it issues.

Enter the name of the responsible office or department on the template where it says “Name of Responsible Office.”

Official department/office names must be used. Please refer to the Organizational Guide available at

<http://www.cotc.edu/depts/HR%20Forms/OrgGuide-COTC.pdf>.

## POLICY STATEMENT

This section contains the statement of policy. The policy statement is the governing principle, plan, or understanding that guides the action and provides the business reason driving the need for policy; reason for being. It states what we do, but not how. The policy statement(s) should be brief (2-6 sentences), and is supplemented by the information within the rest of the policy. The policy statement guides and determines present and future decisions and direction, and reflects and defines institutional values.

Questions to consider when writing the policy statement section:

- Does it accomplish the purpose of the policy?
- Does it clearly articulate what the policy is and what it is to accomplish?
- What is the scope of the policy?
- Does this section contain only policy (not procedures)?
- Is the policy statement consistent with the applicable laws, regulations, and policies?

## Purpose of the Policy

This section contains a short general descriptive paragraph that includes regulatory or legislative references as appropriate. States the requirement or provision that is placed on or extended to the college community.

## Table of Contents

This section is suggested recommended for policies that are long and complex (e.g. documents 6-10 pages or longer)

## Definitions

Defines terms that have specialized meanings in the policy. When the subject matter requires a precise understanding of terms, include them here. This allows a reader to approach the content in a more knowledgeable manner, and to easily refer back to the definition as needed when the term is used frequently throughout the policy section. When a term has more limited use, it can be defined in the body of the policy and Definitions may be omitted.

Questions to consider when writing the definitions section:

- Does it define new, uncommon, and/or specialized terms?
- Does it define terms that can have different meanings in different contexts?
- Does it list terms in alphabetical order?

## Policy Details

This section is optional and, if used, should include information that elucidates the policy at a higher level than procedures.

## PROCEDURE

Procedures describe how the policy is implemented at the college. The action steps included here should clearly and accurately describe the process and responsibilities for accomplishing tasks governed by the policy. Procedures are the *required* process for the specific situation.

The procedures should be organized for ease of use. Some policies may require multiple procedure headings for the different tasks addressed. While procedures are organized as a chronological series of steps required to accomplish a task, responsibilities are organized as lists of tasks that must be completed by an individual or department.

This section prescribes the means of implementing and complying with the policy. Procedures articulate how the policy will be implemented. Questions to consider when writing the procedure section:

- Is it consistent with the policy statement section?
- Does it contain the specific actions or steps needed to comply with the policy?
- Does it contain implementation plans and dates for policies that require a phased implementation?
- Are procedural requirements reasonable?
- Does this section contain only procedures (not policy)?
- Is the procedure section consistent with the applicable laws, regulations, and policies?

## Responsibilities

Summarizes the responsibilities of college departments, offices, positions, or individuals named in the policy. Similar to the Procedures section, this section presents responsibilities according to job function/office, while Procedures presents the responsibilities according to tasks.

## Resources

This section is required for anything referred to in the policy.

- Links to forms, tools, and processes used to implement or required for compliance with the policy;
- Links to federal state or local laws or relations;
- Provides background material that is helpful and not directly related to policy implementation.

It is important to remember that resources are meant as supplemental information, and they should not be relied upon to convey significant policy information.

## Contacts

Lists topics and the corresponding contact information: office name (not an individual's name); telephone (including area code); e-mail; and URL.

## History

List each issue, revision, edit, or review date in chronological order. Note in this section when the policy name or number changes. Note Board of Trustee action date, if board action was taken. Note if a revision date is exclusively for the policy section or the procedure section.

**Issued:** First release date of the policy.

**Revised:** Date of substantive content changes approved by the College Policy Process.

**Edited:** Date of style, format or grammar changes and/or correction of error. No approval is needed through the formal review and approval process.

**Reviewed:** Last date that the policy content was reviewed and found to be current, e.g. no changes were made. No approval is needed through the college policy process.