

Policy Writing Guide

Welcome to the CU Denver / CU Anschutz Policy Writing Guide! This document will help you draft a new policy, update a current policy, and navigate the policy review process.

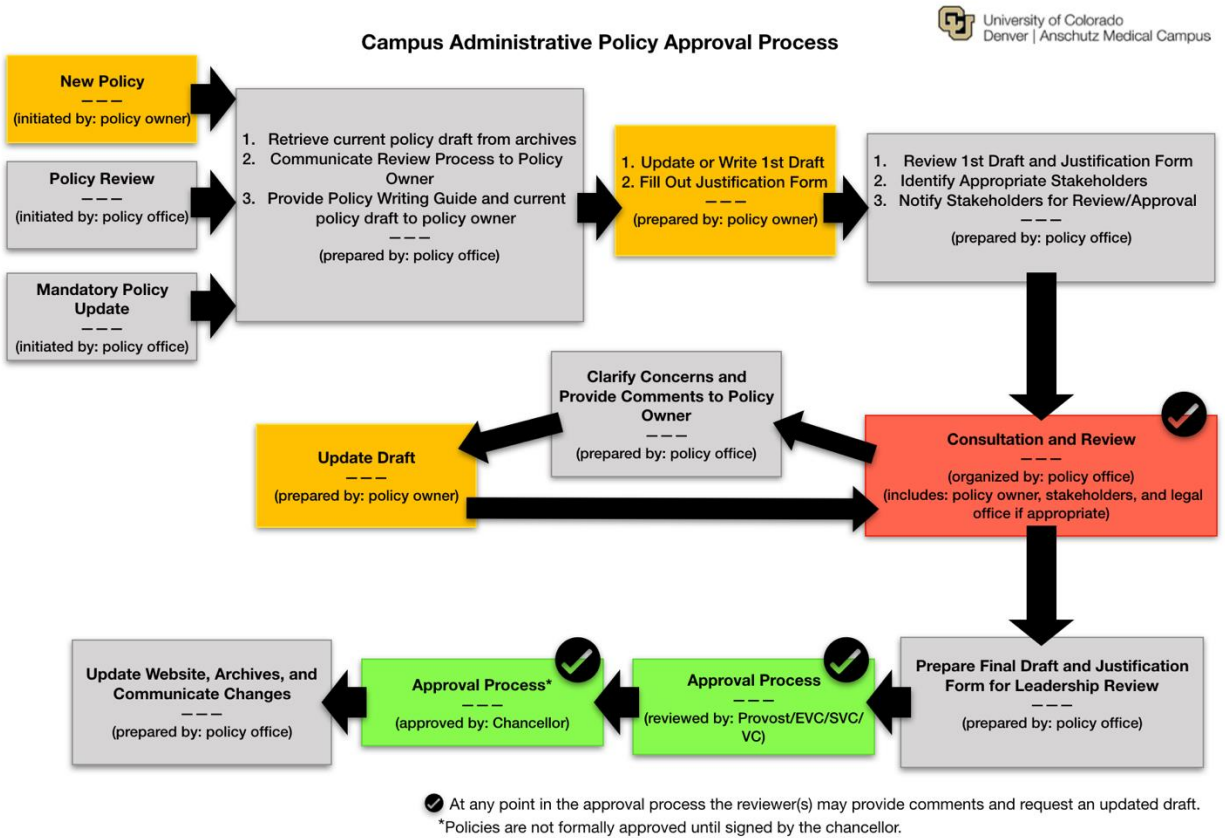
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Policy Review Process

The policy review office is currently led by Mark Heredia, who will help guide you through the policy review process. In total, this process normally takes 4-6 months. However, in special circumstances, it can be accelerated. To begin the process, whether to update an existing policy, propose a new policy, or rescind an obsolete policy, start by reading this guide and contact the policy office at policy@ucdenver.edu with any follow-up questions. The policy office will also provide any previous/existing drafts of the policy from the official campus archives and provide you a policy template, if needed, and also a justification form. There are additional resources/information contained in the [CU Denver | CU Anschutz Campuses Online Policy Library](#). Once your policy is ready to enter the coordination process, send it and the completed justification form to the policy office for an initial review of the draft, and justification. After consulting with the policy office, the relevant stakeholders are identified and the policy enters the coordination/comment phase. This phase can be completed in as little as 30 days or longer, depending on comments received and number of subsequent drafts created. During this phase, the policy office will maintain all comments and draft versions and update the justification form as stakeholders complete their reviews. Once the coordination/comment phase is complete, the policy office will prepare a final draft and update the final justification form. Finally, these materials will be sent to leadership for final review and approval.

The policy review process is summarized in the illustration below. Additionally, a “step-by-step” textual description is provided. If you have questions, please contact the policy office: (policy@ucdenver.edu).



Policy Review Process for CU Denver | CU Anschutz

Steps in Process:

- 1) A policy could be reviewed for essentially 1 of 3 reasons:
 - a. 5-7 year review cycle (per Campus Policy 3000, *Establishing Campus Policies*). We do this twice a year, starting in January and July. Policy Coordination Manager (PCM) meets with each functional area officer 1-1 to review the policies in their portfolio and decide which policies will be reviewed in the following cycle. (Finance/Administrative, HR, Research, OIT, Student/Academic/Faculty Affairs)
 - b. Mandatory policy update from Colorado Legislature, Board of Regents, CU System, etc.
 - c. New proposed policy

- 2) Identify a Policy Owner for the policy to be reviewed/edited
- 3) Policy Owner or designee updates the policy, with other expertise as needed, until they arrive at what they consider their “first draft.”
- 4) Policy Owner provides the first draft of the updated or new policy to the Policy Office.
- 5) PCM reviews policy for format/administrative compliance and creates draft justification sheet which details why the update/policy is needed and which stakeholders need to coordinate on the policy
- 6) PCM coordinates with Policy Owner on justification sheet and stakeholder review. Upon agreement, PCM sends policy to stakeholders for (“targeted review”) and posts to website for (“general review”) of policy with a 30-day due date
- 7) PCM gathers all comments after 30 days and forwards them to the Policy Owner for adjudication
- 8) Policy Owner updates policy based on comments and creates “second draft”
- 9) Policy Owner provides PCM the second draft of the policy
- 10) PCM conducts “second-level coordination” which includes (if applicable) Legal, Deans, AVC for Administration and Finance, Provost, VC for Research, or another officer as appropriate.
- 11) Once second-level coordination is complete, clean draft goes to Chancellor for signature/approval
- 12) Once the policy is signed/approved by the Chancellor, the PCM updates the archives and online policy library.

Drafting A New Policy

Contact the university policy office at (policy@ucdenver.edu) to get the latest WORD version of the policy. Any changes to the policy must be submitted via a tracked-change version of the provided WORD version of the policy.

Begin by downloading [Campus Administrative Policy 3000, Establishing Campus Policies](#), and its [Appendix A](#), which is the template for “CU Denver / CU Anschutz” OR “university” policies if a new template is needed (discuss this with the PCM first)

Format:

- The template attached above details the format of CU Denver | CU Anschutz Policies. Please follow this format to ensure consistency for all CU Denver | CU Anschutz Policies.

Heading (Required):

- Please leave this area blank as it is for policy use only.

Introduction (Required):

- A one paragraph summary clearly stating the policy purpose and content.
- The introduction should also express exactly who the policy applies to and the consequences for non-compliance, if applicable.

Table of Contents (Optional):

- If the policy is longer than 5 pages, include a table of contents.
- While most policies only detail major sections (A, B, C....) be as specific as you feel is appropriate.

Definitions (Optional):

- List definitions of terms used in the policy statement.
- Only include if necessary.

Policy Statement (Required):

- The policy statement details the "guiding principles that express the institutional culture, goals, and philosophy for the entire campus(es). Official university policies promote consistence and operational efficiency, enhance the University's mission and mitigate significant institutional risk"(Campus Administrative Policy 3000).
- What do I put here?
 - This is where the majority/bulk of the policy should reside. The length of this section can vary greatly Try not to include procedures or guidelines in the policy itself.
- Policies vs Procedures and Guidelines:
 - "Policies reflect the "rules" governing the implementation of the campus processes. Procedures, on the other hand, represent an implementation of policy and should evolve over time as new tools emerge, new processes are designed, and the risks associated with an area changes in response to internal or external environmental changes. (In fact, there should be an expectation that individuals will "challenge" outdated procedures and call them to the attention of their owners.) As a consequence, rather than combine "policies," "procedures," and "guidelines" in a single document, it is recommended that as a general rule policies and procedures appear as separate documents" (Campus Administrative Policy 3000).
 - Guidelines are defined in Campus Policy 3000 as "a piece of advice on how to act in a given situation. Examples of guidelines include: Best Practices,

Screening Guidelines. Guidelines shall have limited jurisdiction applicable to the respective issuing unit.”

- A more in-depth comparison of policies and procedures is listed in Campus Policy 3000 linked above.

Notes (Required):

- Leave items 1-3 blank as they are for policy use only.
- In #4, list all of your references in the standardized format below.
 - Campus Policy XXXX Title
 - CU System Administrative Policy Statement “APS” XXXX, Title
 - Board of Regents Policy XXAA (ex: 5D)
 - Board of Regents Article XXAA (ex: 5D)

Appendix (Optional):

- At the very end of the document, attach any appendices after a page break.
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Updating an Existing Policy

When updating an existing policy, begin by reviewing the style and mechanics section of this guide to ensure compliance with CU Denver | CU Anschutz Policy sections. If needed, download the policy template linked in the “Drafting a New Policy” section.

The following questions are meant to help guide your policy revision. They do not all need to be considered in review of an existing policy.

Comprehensive Review Questions to Consider:

1. What is working well with the process and policy?
2. Does this policy have known points of failure, and if so, what improvements would reduce these failure points?
3. If compliance with this policy is part of measuring its effectiveness, how do you assess compliance and what office will be ensuring compliance?
4. Are there audit findings to consider?
5. How does your policy compare with peer institutions?

[CU Boulder Policies](#)

[UCCS Polices](#)

[CU Denver & CU Anschutz Peer Institutions](#)

6. What common questions have been asked since the past review? Are they on particular clauses or section of the policy?

7. Does the policy owner or senior leader wish to propose a significant change?
 8. When considering policy language through the stated equity lenses, are there any potential barriers to compliance with the policy or disparate impacts created by a policy and/or related documents (FAQ, procedures, appendices)?
 - a. Equity lenses includes but are not limited to: ethnicity, race, religious expression, veteran status, people of color, people who identify as women, age, socio-economic status, people with both apparent and non-apparent disabilities, gender identity and expressions, and American Indians and other indigenous populations
 9. If so (Q9):
 - a. Describe the potential barrier or disparity
 - b. Specify how the potential barrier/disparity might be mitigated/not mitigated
 - c. Explain the process used to arrive at the determination
 - d. State how those impacted by the identified disparity were consulted
 10. Who are the central individuals or units (“Stakeholders”) that should review this policy?
 11. Will we need legal review on this policy?
 12. For dual-campus policies, what is your plan for involving relevant staff in the revision and consultation process?
 13. Does this policy still align with other campus, CU System and BoR articles/policies?
 14. Are the impacted audiences still the same?
 15. Are any changes needed to reflect current titles, changes in authorities for the individuals who play a role in the policy?
 16. If there are special situations, have these changes? More to add or remove?
 17. Should there be changes to prohibitions?
 18. Are there new documentation requirements/changes?
 19. Are any new supplemental documents needed?
 20. Are the procedures still correct?
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Style and Mechanics

University Branding:

- Naming Conventions:
 - Naming conventions are an important part of reinforcing University Branding as well as clearly indicating the scope of each policy. The correct full and condensed names for the three relevant campuses are listed below. These are the **only** terms that should be used to refer to the campuses in CU Denver / CU Anschutz policies.
 - University of Colorado Denver / CU Denver Campus

- University of Colorado Anschutz Medical Campus / CU Anschutz Medical Campus
 - University of Colorado South Denver Location / CU South Denver Location
 - If referring to both CU Denver and CU Anschutz campuses jointly, you can define them as ‘the university’ and subsequently use this definition
- Logos:
 - Logos are equally important parts of reinforcing University Branding and identifying CU Denver policies. The template for new policies includes the appropriate CU Denver/CU Anschutz logo. For policies that only apply to CU Denver or CU Anschutz, download the logo package linked below.
 - [CU Denver Logos](#)
 - [CU Anschutz Campus Logos](#)
- For a complete understanding of University Branding, please visit the [CU Denver University Branding website](#).

References:

- Titles
 - According to university editorial guides, titles should all be lower case unless they are preceding a name. For instance: provost as opposed to Provost Nairn. Other titles include: dean, chair, chancellor.
- Abbreviations and Acronyms
 - Abbreviations and acronyms should be used in moderation; the full name of a title should be written out and followed by the abbreviation or acronym in parenthesis.
 - Abbreviated academic degrees should not have periods: BA, BFA, MBA, PhD etc.
- Academic Degrees and Titles
 - Try to only use degree names with an apostrophe (master’s, bachelor’s) as opposed to courtesy titles (Dr., Prof.) except in the case of PhD/doctor of philosophy degrees.
- Board of Regents
 - “Board of Reagents” is only capitalized on it’s first use, after that, reagents is lowercase unless it is followed by a name.
- Commonly Used Words
 - advisor (not adviser)
 - alum (singular), alumni (plural)
 - fundraising (no hyphen or space)

- healthcare (one word)
 - OK (not okay)
 - post-baccalaureate (hyphenated)
 - pre-health (hyphenated)
 - semester hours (not credit hours)
 - Web and electronic references
 - e-commerce, e-book, e-newsletter (all compound e-words, other than email, are hyphenated)
 - email (lowercase, no hyphen)
 - email addresses all lowercase (first.last@cuanschutz.edu or first.last@cudenver.edu)
 - login (noun); log in (verb); log in to UCDAccess
 - internet (lowercase)
 - online (one word)
 - Twitter (uppercase), tweet (lowercase), retweet (lowercase, no hyphen)
 - website, webcam, webcast, webmaster (single word, lowercase, no space or hyphen)
- For further questions, please refer to the [CU Denver](#) and [CU Anschutz](#) editorial style guides.

Digital Accessibility:

- In order to accommodate screen readers, do not include in-text links within the body of the text. Instead, use a hyperlink.
- Only use black font to increase digital accessibility.
- Refrain from using tables and instead use an outline format to accommodate screen readers. If a table must be used, name all headers for columns and rows to clearly outline the data.
- Refrain from using roman numerals as they do not translate well for screen readers.
- Include text descriptions for images.
- As a rule, accessible content should be well organized, properly labeled, and easily found in web searches.
- Please refer to [Campus Administration Policy 5012, Digital Accessibility](#), for more information on how to ensure your policies reflect digital accessibility best practices

Gender Inclusion:

- Use gender neutral language as detailed below.
 - The majority of the world’s major English-language dictionaries and style guides have moved to recognize the singular non-binary “they” – although some more cautiously than others.

- Examples of professional organizations and style guides that moved to support the use of the singular, gender-neutral “they,” “them” or “their” include:
 - Associated Press Stylebook – arguably, the foremost arbiter of grammar and word choice in journalism has added an entry for “they” as a singular, gender-neutral pronoun in its latest edition.
 - “We offer new advice for two reasons: recognition that the spoken language uses they as singular and we also recognize the need for a pronoun for people who don’t identify as a he or a she.”
 - But they stress that it’s usually possible to write around that issue.
 - “They, them, their”
 - In most cases, a plural pronoun should agree in number with the antecedent: The children love the books their uncle gave them. they/them/their is acceptable in limited cases as a singular and/or gender-neutral pronoun, when alternative wording is overly awkward or clumsy. However, rewording usually is possible and always is preferable.
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Additional Resources & Helpful Links

[CU Denver | CU Anschutz Online Policy Library:](#)

(This policy writing guide was created by Sam Rovno.)