



To: Responsible Officers for University Policies

From: Sarah Willey-Thomas, Associate University Secretary

Subject: Policy & Procedure Template Instructions

In order to encourage consistency, readability and accessibility, policies and procedures approved pursuant to [Policy 1.1 Policy on Establishing University Policies and Procedures](#) must make use of a common template. Please consult Policy 1.1 to determine whether you need the policy or procedure template.

Downloading and Opening a Template

Templates for policies and procedures are available to members of the university community in .docx (Microsoft Word) format through the University Secretariat's [website](http://www.uoguelph.ca/secretariat/policytemplates) (www.uoguelph.ca/secretariat/policytemplates).

Policy # & Policy Name

These fields appear in the header at the top of all pages. Double-click to access and edit these fields.

The University Secretariat will assign the policy number for your policy. If you have not been assigned a policy number please leave this field blank. The Secretariat will fill it in on your behalf. Numbers are assigned based on the functional classification system outlined in Policy 1.1.

The Policy Name is determined by the Responsible Officer (author). Generally, it is best to keep policy names as succinct as possible.

Approving Authority & Related Information

The "Approving Authority" is the Board of Governors, Senate or both bodies.

The Date sections may be left blank if you do not have sufficient information to populate them. Dates should be inputted using the format "January 1, 2018."

Policy Text

The Policy Template contains information on what content to include in each section of a policy. Some sections are optional (i.e. Related Policies, Procedures & Documents), and may be deleted if they are not needed.

The template is set-up to number the sections and sub-sections of a policy automatically. Policies are limited to three levels of numbering (i.e. 1., 1.1., and 1.1.1.). You can transition

between levels of numbering using the "Tab" key or the "Styles" pane in the Microsoft Word toolbar.

Policy authors are asked to refrain from introducing additional formatting into their policy text (i.e. letter or roman numeral denominated lists or subsections, bolding, underlining, italicising etc.) The two exceptions to this request which are permitted are the use of round bullets and the use of italics and other formatting when writing conventions require their use (i.e. titles of published books, legislation etc.)

Questions & Help

Please feel free to contact the University Secretariat for assistance anytime at univsec@uoguelph.ca