OP3

Policy Style Guide

INTRODUCTION

This style guide is meant to give you a feel for the writing style and formatting of policies, procedures, guidelines and protocols (collectively referred to as "policies" in this document). It is not intended to be an indepth policy writing manual.

If you have any questions about anything in this guide, or any other questions related to policy writing, please contact ANY of the following:

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About the Policy Offices of NSHA/IWK and OP3 (One Province, One Process, One Policy)

The NSHA and IWK Policy Offices are made up of a small number of people who's job it is to:

- help policy writers navigate through the policy development process
- manage the policy library (OP3 site)
- gather, maintain and share expertise on policy writing
- support NSHA and the IWK to follow their Policy Development Policies

OP3 is a collaboration between the IWK and NSHA. Throughout this document, the term "Policy Office" will be used to denote both the NSHA and the IWK Policy Offices.

ABOUT THE TEMPLATE

All policies must follow the policy template. This is to ensure consistency and make it easier for the reader to "know where to look" in each document for the relevant information.

The policy template has several different headings. Not all documents need every heading. Use only the headings you need, and delete the sections you don't. Keep the headings you do use in the order they appear.

To find the Template:

- Go to the OP3 PAGE
- Look under **Forms** on the lower right hand side of the page, OR
- Click on the icon for NSHA or the IWK to find your organization's template

TEMPLATE SECTIONS

In the HEADER

Title: a brief descriptive label that accurately reflects, as specifically as possible, what the policy is about. Learn more about creating policy titles HERE (page 6).

Number: assigned by the Policy Office.

Policy Sponsor: Person (usually a Zone Operations Executive Director, Senior Director or Director), division, portfolio or standing committee accountable for the development, implementation and maintenance of a specific policy.

Approval Date: assigned by the Policy Office.

Effective Date: assigned by the Policy Office in consultation with the Sponsor.

Page: inserted as a field in the template. Updates automatically.

Applies to: names of the organizations,organizational units or employee groups that the policy applies to, if not addressed in the title.

BODY of the POLICY

Table Of Contents: if necessary, created by the Policy Office.

Policy: clear and concise statements, using plain language. Avoid jargon. Policy statements address "what needs to be done and why".

Guiding Principles and Values: defined in the Policy Glossary (Definitions section of Policy Framework).

Procedure (or Guidelines or Clinical Practice Guidelines or Protocols or SOPs): each of these are defined in the Policy Glossary**.** Generally, these statements direct "how, when, where and who".

Equipment: the first subheading under the Procedure section; any special equipment required to carry out the policy.

References: policies should be rooted in evidence and referenced. With some exceptions, most references should have been published within the past 5 years. APA formatting is preferred.

Separate references to laws and legislation from all other references by listing these first under the subheading **Legislation and Regulations**.

RELATED DOCUMENTS: listed under the most appropriate heading below. Where possible these should be linked.

Policies: policies **directly** associated with the policy you are writing.

Forms: forms required by the policy.

Brochures: associated patient education, or materials for the public/staff/visitors.

Other: any other documents associated with the policy.

Appendices: Any additional required documents such as algorithms and tables.

***

**** centred signifies the end of the actual policy document. Any appendices will follow.*

Policies to be Superceded: a list of all policies being replaced by your policy. (*NSHA only: including former DHA policies*)

Version History: updated by Policy Office

DEFINITIONS: listed as the first appendix (Appendix A) of the document. Any abbreviations, acronyms, initialisms, and/or technical terms are defined here. With rare exceptions, definitions should come from a verified source. **Do not create your own.**

Page Setup and Font

Text Spacing

- Line spacing: 1.15 space
- Paragraph: double space
- Between main sections (TABLE OF CONTENTS, POLICY, etc.): double space
- Between subsections (Forms, Related Documents, etc.) double space

Font

- NSHA Policies: **Lucida Sans**
- IWK : **Arial**
- IWK/NSHA Policies: **Lucida Sans** OR **Arial**
- Headings: 14 pt
  - **Boldface** headings and subheadings.
  - Use all caps for HEADINGS.
  - Capitalize the first letter of subheadings (Forms, Documents, etc).
- Body text: 12 pt.

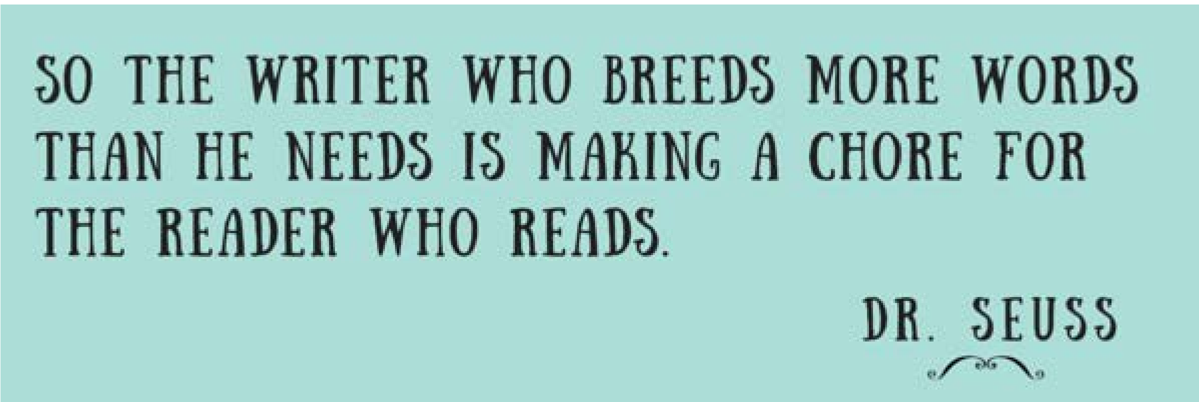
Creating Policy Titles

Write policy titles in the fewest words possible, arranged in logical and meaningful order. The following general rules apply:

- Titles are not sentences – do not include verbs.
- The word "policy" is not included in the title.
- Do not begin with generic words like "Provincial", "Policy" or "Procedure".
- Do not capitalize the following words in policy titles UNLESS they are the first word in the title:
    - o articles (a, an, the)
    - o prepositions (before, up, around, concerning). Click here for more examples.
    - o coordinating conjunctions (and, but, or, nor, for, so, yet)
    - o the word "to" that marks infinitives (to walk, to run, to play, etc.)

Writing Tone & Style

Clarity is the goal when writing a policy. You want the reader to understand what they need to do and be able to act on your words. Keep the language straightforward and aim for a grade 8 reading level.



Voice

Use the **passive voice for policies** and the **active voice for procedures and all other documents.**

- **Passive:** Reports will be completed weekly.
- **Active:** The manager reports weekly.

Tense

Use the present tense for all documents

- **Past:** The reports were completed weekly.
- **Present:** Reports are completed weekly.
- **Future**: Managers will complete reports weekly.

Tone

Be direct, clear, and concise so the reader knows who is responsible for the action. If the action (procedure) in the policy is mandatory, use "must", or "is". If the action is recommended, use "recommended". Avoid using "shall" or "should".

Communicate Negative Messages Clearly

Be polite without being condescending. Don't set out to make readers feel badly… tell them what to do rather than accuse them.

- State the negative, then focus on the positive and briefly explain

  Instead of: "No Parking – Tow Away Zone"

  Write: "Park only in designated areas" with a map of permitted places.

- Use the passive voice so as to avoid drawing attention to errors or inappropriate actions. If reader faults must be addressed, generalize them in the passive voice from an organizational perspective, for example:

  "Sexual harassment is not tolerated in this organization."

Include *only* the Information Needed, Written in Logical Order

> When you wish to instruct, be brief.
> Every word that is unnecessary only pours over the side of a brimming mind.
>
> Cicero

Policies should include all of the information necessary, but only the necessary information.

- Present general concepts, the most important information and the most basic information first.
- Place the important information at the beginning and ends of sentences, paragraphs and pages, and less important information in the middle. *Why? People tend to scan documents, not read each word individually. They will stop at keywords that catch their attention.*
- Write the steps in sequential order. What does the reader needs to know, or do, first? Next?
- Avoid dense paragraphs of text.
- If some of the information is a "nice to know" rather than a "need to know", consider adding it as an appendix or as a related document.

Here's a hint: when you are done your draft, give it to a colleague with a different job than yours. Could they replicate the steps in the policy/procedure without too much explanation (or better yet, none at all)? If yes, you've succeeded in being clear.

Use Inclusive, Accessible Language

- There is no such thing as the "average reader". Write for everyone. Avoid gender-specific pronouns, jargon, etc.
- Consider patient-centred language.

- Use simple language; write at a grade eight reading level to ensure most will understand.
- Define technical terms the first time they are used.

Instead of	Write
Chairman	Chair
Man the service	Staff the service
His or Her	Their
Utilize	Use
Nursing Floor	Patient-Care area

Determining Reading Grade Level

Microsoft Word has a feature that allows you to check the readability of your document. To turn this feature on do the following (you only have to do this once):

Word 2007	Word 2010
Click the **Microsoft Office Button** **,** and then click **Word Options.**	Click the **File** tab, and then click **Options.**
Click **Proofing.**	Click **Proofing.**
Make sure **Check grammar with spelling** is selected.	Under **When correcting spelling and grammar in Word**, make sure the **Check grammar with spelling** check box is selected.
Under **When correcting grammar in Word,** select the **Show readability statistics** check box.	Select **Show readability statistics.**

To check a document, run a grammar and spelling check. It will display the readability score when it's done.

Bolding, *Italics* and Underlining

Use bolding sparingly. The more it's used, the less effective it is.

Italics should be used in the following cases:

- titles of books and journals (not book chapters or journal articles).
- less common words the first time they are introduced used in the sentences, before they are defined.
- reference forms or other policies.

Only underline web addresses (URLs) in electronic documents.

Abbreviations, Initialisms and Acronyms

Spell out abbreviations, initialisms and acronyms the first time they are used in a policy. Place the initials in brackets after the word(s).

Writing Numbers

- Spell out single digit numbers – six, nine; Use numerals for numbers greater than nine.
- Spell out any number beginning a sentence.
- If there is more than one number in a sentence describing the same thing, write all of the numbers as words.
- If there are more than three numbers in a sentence, consider using a table.
- If numbers within a sentence are describing different things, write the numbers describing one thing as numerals and the other as words.
- If spelling out compound numbers between 21 and 99, hyphenate them; for example: twenty-one, ninety-nine.
- Spell out and hyphenate simple fractions; for example: one-half, two-thirds.
- Write mixed fractions as numbers; for example: 5 ½, 6 ¼.

Using Lists

For three or more items in a sentence or paragraph, use a numbered list or a bulleted list. It makes the content more accessible for the reader.

If the order matters, use a numbered list using legal style (1.1.1). For example, if writing a list of instructions that must be done in sequence, compounds in a formula, or steps in a procedure, use a numbered list.

If order does not matter, use a Bulleted List.

Other List Rules

- Capitalize the first letter of each item.
- Punctuate consistently. If items are full sentences or paragraphs, punctuate as usual with a period at the end. If items are single words or phrases, do not use punctuation.
- Write all items in the list in the same voice and tense.

Copyright and Trademarks

Policy writers need to ensure they have permission to use any images, forms, graphs, etc., in their policies they did not create themselves. It is very easy to find an image on the internet and use it in a policy, but it is also (potentially) breaking copyright law. If you are unsure whether your image is safe to use, check with **Library Services**.

Here are some basic rules:

- © is just a reminder. All creations of the mind are automatically copyrighted.
- Google Images is not a bank of copyright-free content. Unless an image is in the public domain, or the owner indicates it may be used freely in certain circumstances, perhaps for noncommercial use, you must ask permission to use an image. Look for the Creative Commons logo and read the permission information carefully. Creative Commons is a growing movement that helps creators give clear permission for their work copied, adapted, redistributed, and/or republished in various ways. Wikimedia Commons is another bank of images

that can be re-used, but be sure to read permissions for each particular image to be sure you are doing it correctly.

- Permission is sometimes given to individuals to use an image or graph (or other information) for their "own personal use". Using this material in a policy is not "personal use".
- Do not copy and paste text from other documents directly into your own without permission. If it's online, you can link to it.
- When considering supporting policies with commercial educational videos or e-learning modules, declare that you are working for an organization not purchasing for your own personal use. Likely there will be a need to purchase presentation rights for the videos and network licenses for the e-learning. A $500 video might have $5,000 presentation rights.
- Brands and Trademarks also require careful attention. These are not always followed by ® or ™ or registered in trademark databases. Generally, permission is required to use or adapt branded information.

It is important to cite the reference for content that is neither common knowledge nor original to NSHA/IWK or the author.

Questions?

Contact any member of the Policy Office for help.

We love this stuff.

Really.

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