



# **University of California Presidential Policy Style Guide**

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## Introduction

This guide is designed to assist UC Policy Owners with standard writing practices that build consistency across all Presidential policies, encourage clarity, and reduce technical loopholes.

Policy documents are not marketing documents or creative writing pieces. Policy materials must be thoughtfully worded to clearly explain how to operate within the requirements with minimal confusion, errors, or risk of non-compliance. Policy documents should enable the reader to:

- Identify the directives,
- understand the requirements; and
- implement practices that support the University's mission of teaching, research, and public service within the constraints of the law, external obligations, and University policy.

Questions, and comments may be sent to the University Policy Office; [policyoffice@ucop.edu](mailto:policyoffice@ucop.edu).

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## The Presidential Policy Template

The University Policy Office has developed a required standard template for Presidential Policies, which is available on the [Policy Toolkit website](#). Policies must address accessibility requirements in [Information Technology Accessibility IMT-1300](#) before the policy is finalized.

### Active Voice

Writing in an active voice eliminates ambiguity about responsibilities by specifying which role will perform an action.

<i>Passive voice</i>	<i>Active voice</i>
The University would like those who witness or experience Abusive Conduct to seek help through a confidential resource.	The University provides confidential resources to individuals who witness or experience Abusive Conduct.
New regulations were proposed.	The State of California proposed new regulations.
Regulations have been set forth.	The Department of Labor has issued regulations.

Legal writing experts agree that avoiding the archaic descriptor *shall*, reduces ambiguity. Be aware of the *weight* of each word as you develop or revise policy.

<i>The descriptor</i>	<i>is used for</i>
must	an obligation
must not	a prohibition
may	a discretionary action
should	a recommendation

### Unnecessary Words

Wordy, dense documents can be confusing to readers. Edit your policy to reduce unnecessary or redundant information. Be aware of unnecessary verbs. This is when a verb made into a noun and extra words are needed for the phrase to make sense.

Watch out for *of*, *to*, *on*, and other *prepositions*. They often mark phrases you can reduce to one or two words.

<i>Instead of</i>	<i>use</i>
Perform an evaluation	Evaluate
Reach a decision	Decide
on a monthly basis	monthly
on the grounds that	because

be responsible for	must
in order to	to

Avoid these words:

- Above-mentioned
- aforementioned
- foregoing
- henceforth
- hereafter
- hereby
- thereafter
- thereof
- therewith
- whatsoever
- wherein
- whereof

### Plain Language

Policies should be written so that they are easy to understand across general populations using simple, clear, concise language. For more information consult the [Plain Language.gov](http://PlainLanguage.gov), Improving Communication from the Federal Government to the Public, (2011).

- Avoid the use of jargon, legalese, unnecessary technical expressions and fancy vocabulary.
- Use common words (e.g., ‘use’ instead of ‘utilize’).
- Short and concise sentences are best for conveying complex information.
- Vertical lists highlight a series of requirements or other information in a visually clear way. Use vertical lists to help your user focus on important material.
- Use tables to make complex material easier to understand. Tables help your audience see relationships that are often times hidden in dense text. For most readers, it is not necessary to understand all possibilities and conditions, only those that apply to the reader’s situation.
- Break long sets into smaller sections with informational headings. Readers may be looking to answer a specific question. It is helpful when the text is sectioned into categories that follow the logical organization, workflow, timeline, decision-making process, etc.

### Gender-neutral Language

Inclusive language avoids word choices which may be interpreted as biased, discriminatory or demeaning by implying that one sex or social gender is the norm. This does not intend to overwrite instances when gendered language is necessary or appropriate such as the protection of women or Federal implementation where specific gender is specified.

<i>Not Use</i>	<i>Use</i>
chairman	chairperson
he or she	Individual(s)
policeman	law enforcement

### Oxford/Serial Comma

Lawsuits can be won or lost over punctuation. Whether you subscribe to the Oxford/Series Comma or not as a personal or creative choice, most legal experts agree that using the Oxford/Serial Comma is an important

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distinction for clarity and avoids the unnecessary coupling of terms. The Oxford/Serial is used to separate each item in a series of three or more terms. For more legal writing standards, consult the [Bluebook](#).

<i>Do Not Use</i>	<i>Use</i>
This Policy describes roles and responsibilities for the University Community related to compliance with legal requirements regarding crime reporting, awareness and prevention.	This Policy describes roles and responsibilities for the University Community related to compliance with legal requirements regarding crime reporting, awareness, and prevention.
Exceptions may be premised on Medical Exemption, Disability and/or Religious Objection.	Exceptions may be premised on Medical Exemption, Disability, and/or Religious Objection.

### **Capitalize Defined Terms**

Capitalizing defined terms throughout the body of the text is a legal writing style that ensures the reader will refer to the specific meaning within the context of policy, and not the readers own convention. In turn, the definitions play an important role in determining the limits and liabilities of the University and writers should consult the Commonly Used Terms section of this style guide to ensure the consistent use of terms that have been vetted by UC Legal - Office of the General Counsel (UCL).

### **Using Acronyms**

Introduce each acronym with the full term plus the acronym in parenthesis upon first use. For example, U.S. Department of Education (ED), U.S. Department of Energy (DOE). After the first use, constantly use only the acronym throughout the remaining text. If a term is only used a single time within the text, there is no need to introduce the acronym.

### **Language Translation**

California does not require employee handbooks to be translated into other languages. However, certain policies must be translated if 10% or more of your workforce speaks a language other than English. Some of these include:

- anti-discrimination, retaliation, and sexual harassment policies (including investigation and complaint procedures);
- California Family Rights Act Leave;
- Family and Medical Leave;
- Reasonable Accommodation for Employees Disabled by Pregnancy, Pregnancy Disability Leave or Transfer work safety rules;
- Workplace safety rules.

If you are unsure if a policy requires translation, contact the University Policy Office.

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## Apply an Equity Lens

Apply an equity lens as part of the design and implementation of your policy. An equity lens review will assist in developing a fair and impartial analysis on under-served and marginalized individuals and groups, as well as identify barriers.

Here are some questions to assist you:

Are there individuals and/or communities that will be disproportionately impacted (e.g., students who receive financial aid, staff who are visually impaired, staff position classification)?

Are unwanted historical, legal, or other barriers set in the past being perpetuated or dismantled?

Are assumptions made that everyone has the same understanding of the procedures and implications (e.g., tax implications)?

If barriers are identified, how can they be mitigated or eliminated?

If you are unsure how to evaluate a policy, contact the University Policy Office or the office of [Student and Equity Affairs](#).

## Grammar Check

Review your text with a writing resource such as [Purdue's Online Writing Lab](#).

## Policy vs. Procedure

Procedures that include high-level steps and implementation mandates may be included in a separate section within the Presidential Policy. Departmental or unit-specific procedures that do not require executive-level review and approval may be maintained by the department or unit. Presidential Policies typically do not include specific campus implementation steps or processes that are not applicable across the UC system. Guidelines should be located on departmental or unit websites and referenced in corresponding Presidential Policies, as necessary.

	Policy	Procedures	Guidelines
What is it?	A formal, high-level directive with broad application throughout the University designed to promote operational efficiencies, enhance the University's mission, or reduce institutional risk	Describes steps to implement and support institutional policies	Describes best practices or the recommended process for implementing a policy or addressing a particular topic
What does it achieve?	Sets the direction or strategy for how individuals must address an issue or specific topic and outlines institutional priorities.	Details a process or structure to carry out policies	Outlines best practices or a recommended process
Stylistic approach?	Expresses broad terms that infrequently change	Provides detailed descriptions of expected	Provides descriptions of processes and information on how to comply

	with a focus on desired outcomes, not on means of implementation	activities, and are subject to change and continuous improvement	but leaves room for flexibility in different circumstances. Guidelines should be included in the reference section of the policy
Required to follow?	Mandatory	Mandatory	Voluntary

### Related Information Section

When information is likely to change frequently, avoid publishing it in the policy text. For example, consider posting a reimbursement rate that changes annually on a website and linking the policy text to streamline the update.

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## Commonly Used Policy Terms

**Designee:** an individual authorized to act on behalf of a Senior Administrator for a specific purpose, office, or duty.

**Delegation of Authority:** a formal process that documents the campus official(s) with the authority to approve/execute significant broad-based business activities or specific administrative functions on behalf of the Regents.

**Exception:** variances to a rule or law that may be granted even though the rule or law does apply (e.g. “Any exception to this requirement must be approved by the Chancellor’s Designee” or “exceptions will be granted on a case-by-case basis.”)

**Executive Officer:** The University President, Chancellor, Laboratory Director, or Vice President–Agriculture and Natural Resources.

**Exemption:** situations that are expressly carved out as not being required to follow a rule or law. The exemptions are listed in the rule or law, and if a situation falls within a listed exemption the rule or law does not apply; the situation falls outside its scope.

**Location:** University of California campuses, University of California managed hospitals and medical centers, Division of Agriculture and Natural Resources (ANR), Lawrence Berkeley National Laboratory, and the Office of the President. (for use when referring to scope)

**Medical Centers:** University of California Medical Centers and Hospitals, including, University-owned Children’s Hospitals (e.g., UC Davis Medical Center and Children’s Hospital, UC Irvine Medical Center, Ronald Reagan UCLA Medical Center, Resnick Neuropsychiatric Hospital at UCLA, UCLA Mattel Children’s Hospital, UC San Diego Medical Center, UCSF Medical Center, UCSF Benioff Children’s Hospital San Francisco, UCSF Langley Porter Psychiatric Hospital and Clinics). (Does not include Student Health Centers)

**Senior Administrator:** any employee or official holding the title of Director or above. Senior Administrators include, among others, all Chancellors and Vice Chancellors, Provosts and Vice Provosts, Deans, Associate Deans, and Assistant Deans, Department Chairs, Division Chiefs, and Chief Executive Officers.

**Workforce Member:** means an employee, faculty, staff, volunteer, contractor, researcher, student worker, student supporting/performing research, medical center staff/personnel, clinician, student intern, student volunteer or person working for UC in any capacity or through any other augmentation to UC staffing levels.

**UC Community:** Academic appointees, staff, students, volunteers, contractors, patients, visitors, and anyone else at any University location.

**University Controlled Property:** means buildings and grounds that are operated by, or under the control of, the Regents of the University of California. (for use when describing geographic locations)

**University Personal Property:** means property to which title is vested in the University regardless of the types of funds used to purchase the property and whether it was obtained by gift or transfer from another entity (e.g., equipment (inventorial and non-inventorial), tools, apparatus, material and supplies necessary for the operation of the University).



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**Revision History**

Date	Editors	Contact	Content
May 1, 2023	Anna Joyce (UCLA), Diane Lallemand (UCSC)	<a href="mailto:ajoyce@conet.ucla.edu">ajoyce@conet.ucla.edu</a> , <a href="mailto:diane@ucsc.edu">diane@ucsc.edu</a>	New guide