

## Guidelines for Using the Template

### Secondary Title

**Category:** Click and type: **Category** Choose from the following - Academic, Facilities Management, Finance, Health & Safety, Human Resources, Information Technology, International, Library, Research, Student Services, University Management

**Last Modified:** Click and type: **Month and Year**, e.g. February 2004

**Review Date:** Click and type: **Month and Year**, e.g. February 2007

**Approved By:** Click and type: **Approval Body**, e.g. Academic Board

**Contact Person:** Click and type: **Contact Person's title and extn #**

**Title:** Click and type over 'Type Policy Here' inside the image strip. Title should be right justified. Please modify or rearrange where necessary to facilitate access in an alphabetical web search facility, e.g 'Policy on Harassment' becomes 'Harassment Policy' so that it is searched via 'H' for 'Harassment' rather than 'P' for 'Policy'. If the title is long, drop font size to 12, bold text and spread over two or three lines. The Secondary Title can be used for such statements as "... a guide for Masters' students". If the secondary title is not required, delete the field.

**Category:** Choose from the following categories: Academic, Facilities Management, Finance, Health & Safety, Human Resources, Information Technology (IT), International, Library, Research, Student Services, University Management. - These categories are linked to the delegated approval authority for individual policies and procedures and clarify ownership.

**Last Modified:** Where this information is available, please identify the month and year when the document was created or last modified (whichever is the most recent). Tracked amendments may be included in the notes if relevant.

**Review Date:** Identify a month and year when the document should next be reviewed. The standard review periods will either be one year or three years. (See [FAQs](#) for information about the review process.)

**Approved By:** An **approval authority** is assigned to all policies and procedures, in accordance with the delegations approved by Council. This person, committee or other body has overall responsibility and sign off, e.g. Academic Board.

**Contact Person:** A contact person should be identified for day-to-day administrative enquiries about each policy or procedure. This person will also be the first contact during the review process and will have task responsibility for the document's validity. (See [FAQs](#) for information about the review process.) Operational responsibility may also sit with this person or with a related committee.

## Introduction:

This section identifies briefly why the policy or guidelines have been created and what purpose they serve. The introduction should include a statement about organisational scope, e.g. university wide, and be no longer than a paragraph or two.

## Definitions:

Any key words or jargon identified in the document should be defined. Over time, a glossary of key terms may be developed to assist this process. In the meantime, consistency should be ensured by applying the same definitions across related documents. The word or statement being defined should be in **bold** type.

## Policy Statement:

### **Sub-heading**

This section should only be included if the document dictates a policy rather than procedures or guidelines. See [definitions](#) to clarify the difference and [sample policy](#) to illustrate distinction. Delete section if not relevant. It may be that both this section (Policy Statement) and the next (Procedures/Guidelines) are included if both a policy statement and procedures or guidelines are part of the document. On the other hand, only one of the sections may be applicable.

The policy statement may be quite brief or may stretch to several pages, depending on individual documents. The section may include several sub-headings, as necessary (TNR, font 14, bold). Policy developers have a great deal of flexibility in how the content is presented but are asked to use the following formats where these are applied:

A. B. C.

1.0 → 1.1 1.2 1.3

1. 2. 3.

a) b) c)

i. ii. iii.

It is up to you when you choose to use numbers, outline numbers, letters but all text should be in TNR, font 12 with bolding of titles etc as necessary.

Please do not hesitate to contact the [Policy and Risk Manager](#) for clarification or guidance.

## Procedures / Guidelines:

### **Sub-heading**

This section should only be included if the document dictates procedures or guidelines only rather than policy. See [definitions](#) to clarify the difference and [sample policy](#) to illustrate distinction. Delete section if not relevant. It may be that both this section (Procedures/Guidelines) and the former (Policy Statement) are included if both a policy statement and procedures or guidelines are part of the document. On the other hand, only one of the sections may be applicable.

The procedures/guidelines may be quite brief or may stretch to several pages, depending on individual documents. The section may include several sub-headings, as necessary (TNR, font 14, bold). Policy developers have a great deal of flexibility in how the content is presented but are asked to use the following formats where these are applied:

A. B. C.

1.0 → 1.1, 1.2 .13

1. 2. 3.

a) b) c)

i. ii. iii.

It is up to you when you choose to use numbers, outline numbers, letters but all text should be in TNR, font 12 with bolding of titles etc as necessary.

Please do not hesitate to contact the [Policy and Risk Manager](#) for clarification or guidance.

## Related Policies, Procedures and Forms:

- List (in bullet point form) any relevant policies, procedures, guidelines, statutes, legislation or other documents that users should consider in relation to this document. These may be internal or external to the University of Canterbury. Please ensure that the title is correctly stated so that a hyperlink to the document can be set up.
- Delete section if not required.

## Appendices:

- List (in bullet point form) any forms, templates, discussion documents that are reproduced at the end of the document. Use the format: Appendix A: XYZ Form
- Delete section if not required.

## Notes:

1. Include notes where necessary. You may wish, for example, to track the changes made to this policy or procedure since it was first approved.
2. Delete section if not required.