621 Gracey Avenue
Clarksville, Tennessee 37040

TECHNICAL WRITING GUIDE,
DOCUMENT CONTROL,
AND THE
CONTINUOUS IMPROVEMENT SYSTEM

Continuous Improvement

The **Continuous Improvement System** includes all documents and planned activities an organization uses to ensure quality products and services, such as:

      Documented Processes
      Forms and Templates
      Guidance, Training, and Competencies
      Tools and Equipment, Including Computer Systems and Software

The Clarksville-Montgomery County School System (CMCSS) been certified has under the ISO 9001 standard since June 2003 and will work toward certification to the ISO 21001:2018 standard in 2022.

CMCSS must adhere to the guidelines set forth by the **International Organization for Standardization (ISO)**. ISO is an internationally recognized standard for quality management systems that consistently meets customer and regulatory requirements and continuously improves operations and activities to enhance customer satisfaction.

      *CMCSS held certification to the ISO 9001:2015 standard until July 2021.
      CMCSS is moving to obtain certification to the ISO 21001:2018 standard in 2022.

Document Control

The **Document Control Procedure** ([CIS-P008](#)) outlines the process for maintaining the Clarksville-Montgomery County School System's Continuous Improvement System.

Point of Contact (POC) Responsibilities:
- Maintain an updated list of department/section documents.
- Track external documents.
- Make revisions to documents.
- Distribute revised documents.
- Collect the outdated documents.

*ALL policies must be approved by the Senior Leadership Team and signed by the Director of Schools.

Good documentation is Clear, Concise, and User Friendly.

Document Control System

Creating New Documents

There are not definitive criteria that define whether a document needs to be controlled in the ISO library, however, in general, ask the following questions to determine whether a department document needs to be controlled in the district library:

1. Does the process, procedure, form, etc. involve a lot of different departments, or entail a fairly complicated series of steps?
2. Is the process, procedure, form, etc. something related to a high-priority area for the district?
3. Is it disseminated district-wide to staff, parents, students, or others for long-term district use?

If the answers to any of these questions is yes, then the document should probably be in the ISO library.

When creating and updating documented information, the organization shall ensure appropriate:

a) identification and description (e.g. a title, date, author, or reference number);
b) format (e.g. language, software version, graphics) and media (e.g. paper, electronic);
c) review and approval for suitability and adequacy.

It is also important to remember as departments review their documents that correct approval authority signs off on them before sending them to Continuous Improvement. Please use the guidelines below when seeking approval for document changes:

- Policies - Department Chief, followed by Senior Leadership Team
- Procedures - Department Chief, Head, or Designee
- Forms, Guidance, Work Instructions – Check Associated Procedures; generally, a Department Chief or Designee

Before a policy is presented to the Senior Leadership Team for approval, all appropriate departments should be contacted based on the content and impact of a policy. For example, if a policy relates to stipends, payroll, or other similar matters, the CFO or an appropriate contact from Business Affairs should also provide input. Department heads should initiate these reviews based on the content of their policies; however, the Office of Policy and Continuous Improvement will be happy to facilitate and support in this process.

Updating Existing Documents

Employees will use the CMCSS Document Review Portal to make updates to documents, which will maintain a record of any document review that is initiated. Changes must be approved before they are finalized and should be indicated using the track changes tool in Word. Document Control POCs should communicate any changes to policies, procedures, or forms.

Documents should be reviewed in "families." In other words, review procedures, their associated forms, and their policies together, in general. Follow the steps below to update document libraries throughout the year:

<u>Begin with Procedures</u>

Because department procedures outline exactly how different parts of the district's work are accomplished, what kinds of forms or other documents are needed, etc., it will be

the best first step to figure out what other updates you may need to make to your documents.

As you review procedures, consider the following questions:

- Does this procedure still reflect best practice?
- Does this procedure reflect what we actually do?
- Does this procedure produce the results that we want?

<u>Review Forms, Guidance, and Work Instructions</u>

Once procedures have been reviewed, move to reviewing any forms, guidance, or work instructions that may be associated with those procedures. Further, depending on whether significant changes to department procedures are required, there may need to be entirely new versions of these documents.

<u>End with Policies</u>

Because policies require approval from the Senior Leadership Team, reviewing these documents last after having a chance to audit associated department forms and processes will ensure that they are most current with updates throughout the department. Since policies are typically broad, they may not require any changes beyond adding forms or updating active links.

<u>Writing Guidelines</u>

Fonts and Spacing

For the purposes of CMCSS documentation, it is appropriate and preferred to use the font <u>Arial</u>. The main body text for administrative policies and procedures should be 10-point font, while main headings should be 12-point. Any notes or concluding description should remain in 10-point font, but may be diminished down to an 8-point to distinguish supplementary information from body text.

All paragraphs / "chunks" of text and *headings should be spaced properly, such as on this page, with a line of space separating paragraphs from each other.

*NOTE: Subheadings may remain directly above a paragraph, with no additional space.

New paragraphs and headings should be justified to the left of the page, with no indentations. Also, align the text of the document to the left side of the page to ensure even spacing between words (block alignment often distorts line length).

Headings / Subheadings

The heading / title of a new policy or procedure should be **bolded** and ALL CAPITALS, as this easily draws the eye and states the purpose of the document. Subheadings may remain the same size of the body text (10-point), and may be **bolded**, <u>underlined</u>, or **<u>both</u>**.

Logos

The use of the CMCSS logo is strictly allowed only for professional and appropriate CMCSS-related documentation. All official CMCSS documents should have the updated logo:
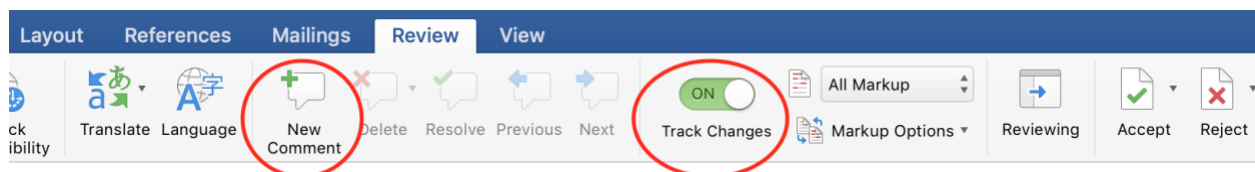

Microsoft Word

Document composition should occur in the **Microsoft Word** application. Having documents supported by a singular processing platform allows for continuity and consistency, as well as supports efficient collaboration.

Microsoft Word offers many tools to make the writing process efficient. The most commonly used document tools can be found under the "Home" tab, such as typeface alterations, font sizing, highlighters, numbering presets, and alignment options.

However, several useful tools lie outside of the "Home" tab.

Under the "Review" tab is the "Tracking" menu, in which the "Track Changes" tool can be activated. Through this application, additions, deletions, and alterations to existing documents can be tracked during the editing process. This option is especially useful when alterations to a document must be submitted for approval, allowing the editors to easily view those alterations.

Microsoft Excel

Another wonderful application that is helpful for the CMCSS writing process is **Microsoft Excel**. This application is particularly conducive for creating lists, tables, charts, and graphics. While these visuals can be made in the **Microsoft Word** application, you will have much more control and optional preferences in Excel.
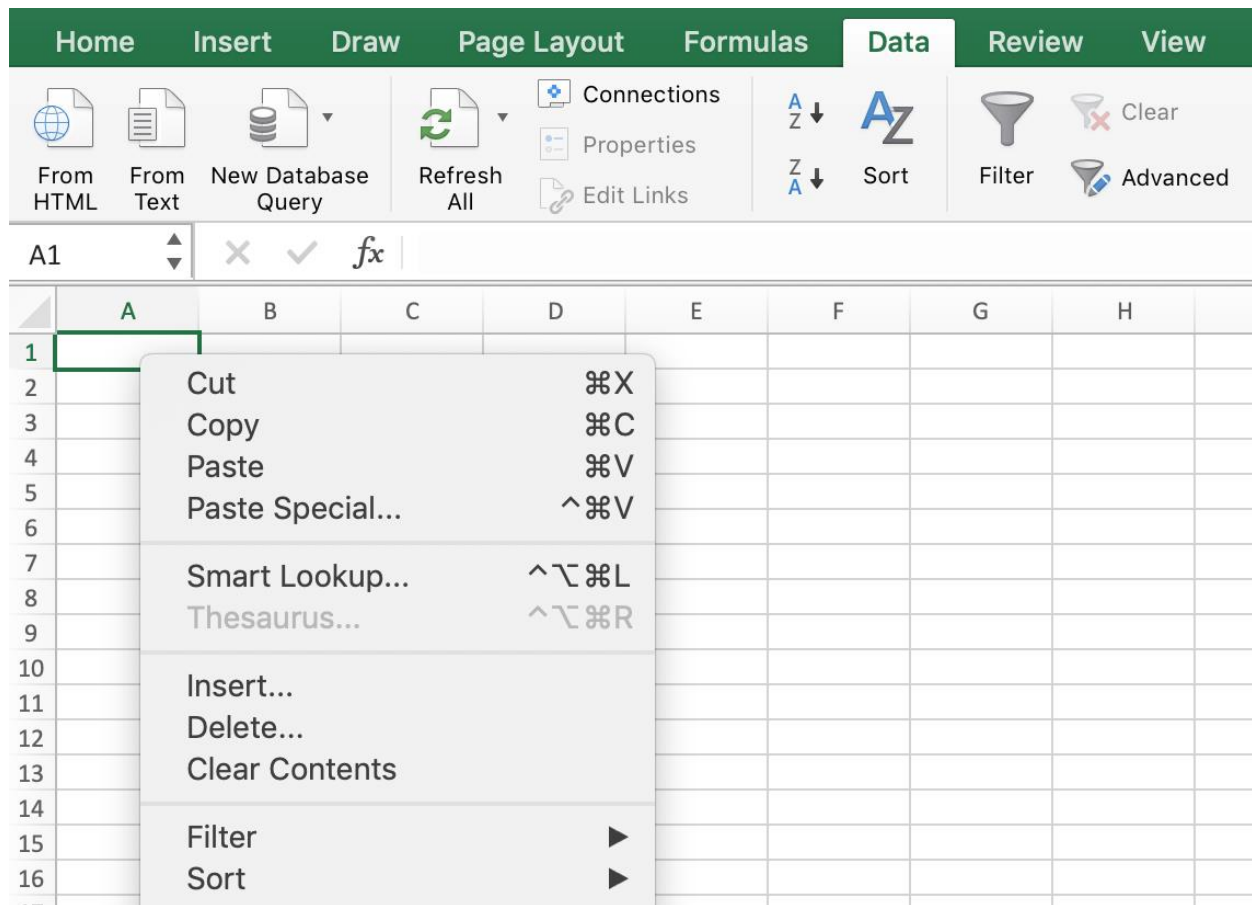
Rows and columns can be easily manipulated to represent individual entries or categories. An easy way to quickly find a specific entry or group of entries in to use the sort and filter tools. With these, you can efficiently locate the desired entry and edit as necessary.

Excel spreadsheets can easily be converted into PDFs and Word-compatible add-ins, so you can insert tables and charts into other documents directly from Excel.

Administrative Policies

Administrative policies should adhere to the following template:
- current CMCSS logo in the top left-hand corner;
- an informational box with the policy's corresponding department, policy number, and effective date;
- a statement of officiality;
- the **bolded** ALL CAPS title;
- the wording of the policy;
- any implementing procedures or associated documents (with hyperlinks, when applicable);
- a revision history table with documentation of any approved revisions;
- a statement of the "End of Policy," and;
- a footer with the most previous revision date/initial release, policy number, and page number.

CMCSS The Defining Difference

| Department: |
| Policy Number: |
| Effective Date: |

ADMINISTRATIVE POLICY

The online version of this policy is official. Therefore, all printed versions of this document are unofficial copies.

TITLE

Wording of policy here.

Implementing Procedures: Related procedures here.

Associated Documents: Related documents here.

Revision History:

Date: **Rev.**   **Description of Revision:**

End of Policy

Date   Policy #   Page 1 of 1

Procedures

Procedures are much like policies, in that they always follow a template (see the next page for a sample). A procedure should include the following elements:
- the current CMCSS logo in the top left-hand corner;
- a header with the procedure's title (in bold and ALL CAPS) and procedure number;
- a statement of officiality;
- a statement of scope (summary) [1.0];
- a statement of responsibility [2.0];
- a statement of approval authority [3.0];
- any definitions of important words or phrases in the document [4.0];
- the actual procedure [5.0];
- any associated documents [6.0];
- a record retention table (where applicable) [7.0];
- a revision history table with documentation of any approved revisions [8.0];
- a flowchart detailing the process outlined in the procedure (where applicable) [9.0];
- a statement of the "End of Procedure," and;
- a footer with the most previous revision date/initial release, procedure number, and page number.

Templates for both academic policies and procedures are available from the Continuous Improvement Office or your department's Document Control POC (Point of Contact).

PROCEDURE
(-P)
Clarksville-Montgomery County School System

1.0 SCOPE:

 1.1

2.0 RESPONSIBILITY:

 2.1

3.0 APPROVAL AUTHORITY:

 3.1

4.0 DEFINITIONS:

 4.1

5.0 PROCEDURE:

 5.1

6.0 ASSOCIATED DOCUMENTS:

 6.1

7.0 RECORD RETENTION TABLE:

Identification	Storage	Retention	Disposition	Protection

8.0 REVISION HISTORY:

Date:	Rev.	Description of Revision:
		Initial Release

9.0 FLOWCHART:

 9.1 A flowchart detailing this process can be found below.

End of Procedure

Links and Online Resources

All CMCSS documents are available on cmcss.net through the Master Document List, and individual documents can easily be found with the "Documents Search" tool.

Searching requires either the document's department abbreviation and identification number (HUM-A003 for example) or a description of the document's title or content.

The link above will direct you to the document search page on the CMCSS website. The search tool is also linked at the bottom of the CMCSS Homepage, entitled "Forms, Policies, & Procedures."

Not all documents are accessible across the organization or to the public. If you need access to a document that you cannot access, please reach out to the Office of Policy and Continuous Improvement.

Contact Table

Each department has a contact within the Office of Policy and Continuous Improvement who can support departments and their document control points of contact as needed and process document updates for that department. All Administrative Policies for all departments will be processed by the Director of Continuous Improvement.

Department or Document Type	Contact
Administrative Policies	Elizabeth Vincent
Business Affairs	Richette Cole
Communications	Rebecca Callender
Human Resources	Elizabeth Vincent
Instruction	Elizabeth Vincent
Operations	Rebecca Callender
Records	Rebecca Callender
Student Services	Elizabeth Vincent
Technology	Richette Cole
Senior Leadership Team	Elizabeth Vincent
Continuous Improvement	Elizabeth Vincent
Child Nutrition	Richette Cole