The Florida State University
SACS 2014 Narrative Writer’s Guide

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# SACS 2014 Narrate Writer’s Guide

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1. Introduction

Florida State University has acquired Strategic Planning Online (SPOL), an online SACS accreditation management software suite, which will be used to organize and publish our final Reaffirmation report to SACS, due in May 2013. SPOL is designed to help us manage the self-study process, collaboratively write the compliance narrative, organize evidentiary documents, and publish the results for distribution.

Several instructional guidelines have been developed to assist narrative writers to use SPOL for their submission process. We encourage narrative writers to follow these guidelines, which will lead you through the process of generating draft versions of your assigned narratives in your preferred word processing software to eventual reference linking, narrative review, and report publishing through the SPOL software.
2. Navigating Strategic Planning Online (SPOL)

The first step in the narrative submission process is to log into the SPOL software to ensure your user account credentials are accurate. The Strategic Planning Online software can be accessed at:

- [https://spa.fsu.edu/](https://spa.fsu.edu/)

Upon navigating to the site, you will be presented with a login screen (pictured below):

An email containing your login name and temporary password will be emailed to you by the system administrator when your account is created. Using that information, you should be able to login to the system and access the SACS standards assigned to you as an individual. If this is the first time you log into the system, you will be prompted to provide a new password to replace the temporary one assigned to you.

If you click the “Remember Login” checkbox on the login page, your Username and Password will be saved to your computer.

If your logon fails, you can reset your password by clicking the “Forgot My Password... CLICK HERE” link:
1. SPOL will send an email to your university email account, providing you with a temporary password.

2. Return to the login page and login using your normal Username and temporary Password; the system will prompt you to create a new Password and to verify it by entering it a second time.

3. Click the Submit button to reset Password and login to SPOL.

Once you have logged into the SPOL system, you will be greeted with your My SPOL homepage (pictured below).

![My SPOL Homepage](image)

This page allows you to quickly access the SACS Accreditation features of the site, as well as view the Standards which have been assigned to your user account. To view your assigned standards, simply click the arrow in the My Standards link under the "Accreditation:" header. This will expand the My Standards section of the page to show all the SACS standards assigned to your account (pictured below).
To access the report management page for any of your assigned standards, simply double click the Standard name (e.g. “2.8 Faculty” in the example above). This will bring you to the **Accreditation Standard Details** page (pictured below).
The Accreditation Standard Details page is the primary report management page for each SACS standard and serves as the organizing point for all information and evidence regarding each standard.
The Narrative section of the Accreditation Standard Details page is the place where you may add your written response to the standard, describing the processes, policies, and other information that demonstrate Florida State University’s compliance with the accreditation requirement.

The Accreditation Standard Details page has three tabs under which a narrative can be entered. Each serves a different purpose:

- **Narrative**: The institution’s or program’s response to the accrediting body regarding its adherence to the standard.

- **SACS Response**: Any comments made by the accrediting body with regard to the institution’s or program’s compliance with the standard following the peer review or other document review.

- **Institutional Response**: The institution’s or program’s response back to the accrediting body, if any.

To add or edit a narrative for the SACS Standard, click on the Edit Response Narrative button in the upper-right corner of the Narrative section (pictured below).

SPOL contains a HTML Editor that provides robust formatting for the standard narrative. Any text already formatted in an external word processor (like Microsoft Word) will paste into SPOL and the text formatting will be preserved, including tables. You can click anywhere in the text entry section of the HTML Editor and use the cut/copy/paste options found in the context menu that appears by right-clicking your mouse to manage text between SPOL and external word processors (see the following sections of this guide for more information).

Once a draft narrative has been developed and added to the Accreditation Standard Details page, the draft may be submitted for review and eventual inclusion in the final report submitted to SACS by using the Approval Options dropdown box (pictured below).
Depending on your role in the development of the SACS standard narrative, the **Approval Options** dropdown box will contain various selections, including:

- Submit for Approval
- Approve Standard
- Reject Standard

**Submit for Approval** will send a narrative draft to the Standard reviewer for inclusion in the university’s final report. **Approve Standard** will approve a submitted narrative draft and forward it to the SACS 2014 Editing Committee for final review. **Reject Standard** will return the narrative to the original submitter for further editing (see the following sections of this guide for more information about the available approval options).

The next sections of this guide will provide detailed instructions on how to complete each of these steps in order, from developing the compliance narrative to uploading and linking all related content, and finally submitting the content for approval.
3. Developing a Standard Narrative

An approved narrative for a SACS standard is comprised of three major elements necessary for inclusion in the university's final report submission. Those elements are:

1. A properly formatted narrative report which adheres to the style guidelines as defined by the SACS 2014 Editing Committee (see Appendix A) and adequately addresses all reporting elements for the standard in accordance with the Southern Association of Colleges and Schools' published requirements.
2. All evidentiary statements contained within a standard narrative are cited and supported through references to established university policies, procedures, and published documentation.
3. Electronic copies of all cited documentation are included with the standard narrative and provided as locally-accessible content on the same media used to submit the final report.

A SACS 2014 Reaffirmation Narrative Style Guide has been developed to provide guidance in creating a standard narrative and ensuring the above report requirements are uniformly met across independent narrative submissions. The guide can be found in Appendix A near the end of this document. All narrative writers are encouraged to review this information and adhere to the style, formatting, and language requirements listed in the guide.

The SACS 2014 Editing Committee has also created a Microsoft Word document (.docx) template to help facilitate the development of professional-quality standard narratives. This template is designed to automatically incorporate the elements of style and formatting guidelines detailed in the SACS 2014 Reaffirmation Narrative Style Guide and provides the easiest method for narrative developers to start building report content.

All narrative developers are encouraged to use this document template as the starting basis for constructing a standard narrative, as it will help to ensure a uniform style and maximum compatibility when each standard narrative is published in the final report scheduled to be delivered to SACS in May 2013.

A copy of the SACS 2014 Reaffirmation Narrative Template may be downloaded from the following location:

- https://spa.fsu.edu/spolnet/sacs/sacstemplate.zip
For narrative developers using Microsoft Word 2003 (and earlier) or older non-Microsoft word processing software, a high compatibility version of the template using the .DOC format may be downloaded from the following location:


(This version is recommended only if you are using a word processor other than Microsoft Word 2007 or Microsoft Word 2010, or if your software does not recognize the current .DOCX file format standard.)

Once a narrative draft has been constructed following the proper guidelines and requirements, the draft will need to be uploaded to Strategic Planning Online in order to be reviewed, approved, and published in the university’s final report to SACS. To comply with the required standard elements listed above, **electronic copies of evidentiary documentation** will also need to be uploaded to the system to support the standard narrative, and **citation hyperlinks** will need to be generated in the narrative text to link to the documentation in the electronic version of the final report.

Citations in a standard narrative should be added as **plain-text placeholders** (see format example below) during the drafting process in Microsoft Word (or preferred word processing software), which will later be converting to hyperlinks after uploading the narrative draft to the **HTML Editor** in SPOL. They should be included inline within the narrative, at the end of sentences and paragraphs. They must cite electronic copies of documents available to upload into SPOL as references in order to meet SACS report standards.

Citations to electronic documents in a narrative should use the following format:

**[Document Filename, Page Number (p.##), Document Revision Date (rev. MM/DD/YYYY)]**

For example, a reference to the Florida State University Faculty Handbook (uploaded as file “FSU Faculty Handbook.pdf”) will be cited as follows in the narrative:

“This is the sentence in the narrative referencing the citation. [FSU Faculty Handbook, p.23, rev. 08/12/2012]”

All citations must include the Document Filename element, but Page Number and Document Revision Date are optional qualifiers which can be included as needed. These are some additional examples of properly formatted citations:
• “This is the sentence in the narrative referencing the citation. [FSU Faculty Handbook]”
• “This is the sentence in the narrative referencing the citation. [FSU Faculty Handbook, p.23]”
• “This is the sentence in the narrative referencing the citation. [FSU Faculty Handbook, rev. 08/12/2012]”
4. Adding a Standard Narrative and Documents to Strategic Planning Online

Once a draft version of a standard narrative is completed with the proper citation plain-text placeholders, the referenced evidentiary documents need to be uploaded to the SPOL system using the Document Management section of the Accreditation Standard Details page (pictured below) before the narrative draft text is copied into the HTML Editor.

To upload documents, click the Add Document button to access the full SPOL document library (pictured below).

Here you will see a folder structure for the SACS 2014 Reaffirmation process which is divided into individual folders for each Standard to store all evidentiary documentation cited in each standard narrative (pictured below).

To upload documents referenced in a narrative, click the document folder for the Standard, and then click the Upload button (pictured below).
This will bring up a dialog box prompt to select which the document on your local system to upload to SPOL (pictured below).

Click the **Browse** button to navigate the files on your local computer system and choose the appropriate reference document. You will need to upload each reference document individually (pictured below).
Click the **Open** button (pictured above), and the SPOL system will automatically upload the file and return to the **Document Library** with the new file visible in the chosen Standard folder (pictured below).

You may upload additional documents using the same process by clicking the **Upload** button again (pictured above). If you have completed your document uploads, click the **Close** button to return to the **Accreditation Standard Details** page, where the new document will listed in the **Document Management** section (pictured below).

After uploading all evidentiary documents for a Standard, the standard narrative draft must be copied into the **HTML Editor** and the **plain-text citation placeholders** in the narrative must be converted into **hyperlinks** to the uploaded documents.

To copy over the draft of the standard narrative from a word processor, select the entire narrative in the word processor and use the **copy** function to temporarily copy the narrative to the computer’s clipboard.

Once copied, open the **HTML Editor** for editing in the **Accreditation Standard Details** page in SPOL by clicking the **Edit Response Narrative** button (pictured below).
Note: please check that the **Narrative** tab is selected (colored dark blue, as pictured above), and not the **SACS Response** or **Institutional Response** tab before copying the standard narrative into the **HTML Editor**.

Clicking the **Edit Response Narrative** will open the **HTML Editor** in editing mode (pictured below).

If you have previously copied the narrative from your word processing software into the clipboard, you may paste the narrative into the blank, editable place by **clicking the blank space, right-clicking the mouse to bring up a context menu, and selecting Paste from the menu** (pictured below).
After selecting the **Paste** option:
As an alternative, you may also use the standard **CTRL + V** keyboard shortcut for pasting from the clipboard instead of using the right-click context menu option.

Once the narrative is copied into the **HTML Editor**, it is recommended that you click the **Save** button in the upper right-hand corner to ensure your narrative is stored in the system (pictured above).

The final step of adding a narrative to SPOL is generating citation **hyperlinks** in the narrative to the evidentiary documents previously uploaded in the **Document Management** section. To accomplish this, **highlight each citation placeholder** in the narrative and click the ![Link Document](image) button in the toolbar (pictured below).

This will display a dialog box with the uploaded documents for the specific Standard. Select the one appropriate for the highlighted citation and click the **Add Document Link** button located at the bottom of the dialog box (pictured below).
After clicking the **Add Document Link** button, a prompt will appear to select whether or not you would prefer the document to open at the beginning or to a specific page or location within the document (if a page number is listed in the original citation) (pictured below).

After selecting the appropriate document location, click the **Continue** button and the system will return to the editing mode of the **HTML Editor**, where the highlighted citation placeholder will now be a colored **hyperlink** (pictured below).
Repeat this process for all citation placeholders within the narrative, and click the **Save** button, then **Close** button in the upper right-hand corner when finished (pictured above).

The standard narrative will now be completed in the **Accreditation Standard Details** page and ready to be submitted for approval.
5. Submitting a Standard Narrative for Approval

A completed standard narrative draft that has been added to the SPOL system must be submitted for approval by the review board for eventual inclusion in the final report to SACS.

A narrative is ready for approval after having copied the narrative into the HTML Editor, uploaded electronic copies of all evidentiary documents cited in the narrative, and converted all plain-text citation placeholders in the narrative to hyperlinks.

To submit a narrative for approval, navigate to the Approval Status dropdown menu near the top of the Accreditation Standard Details page (pictured below).

![Accreditation Standard Details](image)

Depending on the roles assigned you by the SACS committee, the options in the Approval Status dropdown menu will vary depending on several factors, including account permissions and current level of approval for the standard narrative. Normally, a user with the narrative writer/development role will see the following options (pictured below):

- Submit for Approval
- View Approval History

To submit a narrative draft for approval, click the Submit for Approval option.
A confirmation dialog box will appear. Click the **OK** button to confirm the submission (pictured below).

![Message from webpage](image)

The system will return to the **Accreditation Standard Details** page, and the **Approval Status** of the Standard will have updated. This is the primary notification that the narrative has been sent on for approval (pictured below).

![Awaiting Approval](image)

The individual or group assigned to review and approve the narrative will receive **email notification** that one of their assigned standards is ready for approval. No further action is required on the part of the submitter unless the narrative draft is sent back to the submitter for revision.

The original submitter will receive **email notification** in the case of a narrative draft being sent back for revision, with notes from the approver on the revisions that are required for approval. Resubmitting the narrative draft follows the same procedure as the original submission process outlined in this section.
6. Approving a Standard Narrative

An individual in a review/approval role will receive email notification that a narrative for a Standard to which they are assigned has been submitted for draft approval. In order to approve or return a submitted narrative draft, the Approval Status dropdown menu in the Accreditation Standard Details page for the Standard is used to complete the approval actions (pictured below)

A reviewer/approver may either select Approve Standard to submit the narrative draft to the SACS 2014 Reaffirmation editing committee or select Reject Standard to push the narrative draft back to the original submitter for revisions.

If the narrative draft is sent back to the original submitter, Standard Rejection Notes are required from the approver in order inform the original submitter of the changes that need to be made to the narrative draft in order for it to meet approval standards (pictured below). These notes are required in order to reject a narrative draft.
Once a Standard narrative has been fully approved at all levels, the **Standard Approval** section will have a green **Approved** status indicator (pictured left).

An approver may also include additional information for a narrative developer by adding notes to the **Suggested Follow Up** section of the **Accreditation Standard Details** page (pictured below).

This section allows both narrative developers and approvers to add notes to any Standard in order to facilitate the submission approval process. To add a new note to the Standard, click the **Add Suggested Follow Up** button in the upper right corner of the section (pictured above), and enter the information using a editing window similar to the **HTML Editor** editing mode (pictured below).
All new **Suggested Follow Up** notes will appear on the **Accreditation Standard Details** page in ascending chronological order, starting with the earliest notes entered for the standard.
7. Revising a Rejected Standard Narrative

A standard narrative returned to the original submitter due to rejection by an approver should be revised to the specifications detailed by the approver in the Standard Rejection Notes included with the rejection notification, as well as any guidelines or notes that are added to the Suggested Follow Up section of the Accreditation Standard Details page (pictured below).

This section allows both narrative developers and approvers to add development notes to a Standard in order to facilitate the submission approval process.

A narrative developer has a choice when revising a rejected standard narrative to perform the revisions directly in the SPOL HTML Editor or copy the narrative text back into a word processor to make the revisions. It is recommended that edits and changes be performed in the HTML Editor to facilitate ease of development. In situations where larger revisions require the use of dedicated word processing software, it is recommended that the developer highlight the narrative text in the HTML Editor, right-click the mouse to bring up a context menu which contains Copy and Paste functions, and use those functions to copy the text into the word
processor. Alternatively, highlighting the text and use the keyboard shortcut **CTRL + C** will copy the text into the system clipboard. Then, click in the word processor editing space and use the keyboard shortcut **CTRL + V** to paste the text.

Once the text has been copied into the word processor and the revisions have been completed, please follow the instructions detailed in the Adding a Standard Narrative to Strategic Planning Online section of this guide to add the text back into the HTML Editor. All previously generated citation hyperlinks should continue to function as normal once the narrative text is copied back into the HTML Editor provided the hyperlinks were not altered or edited in any way during the revision process in the word processing software environment.

Once the revised narrative text has been entered into the HTML Editor, please follow the instructions detailed in the Submitting a Standard Narrative for Approval section of this guide to re-submit the narrative draft for approval.
8. Support and Contact Information

For technical support or questions regarding the Florida State University SACS 2014 Reaffirmation process, please contact Jessica Peters at sacshelp@fsu.edu.
Appendix A: SACS 2014 Reaffirmation Narrative Style Guide

In order to keep a uniform appearance between the individual SACS standard narratives, the following style guidelines have been created for all narrative submissions pertaining to the 2014 SACS reaffirmation. This style guide recommends narrative writers construct the initial draft of their narrative in Microsoft Word (or preferred word processing software) for ease of development, following these requirements:

**Default font settings - Arial font at 12pt. size.** This conforms to the default font settings established when the final, comprehensive narrative report is published from SPOL.

**Margins** - Establish 1” margins on all sides, letter-sized paper, portrait orientation, so that the printable space on the page is 6 ½” x 9”. This conforms to the default page setting established when the narrative is published from SPOL, and will provide an accurate preview of the final report before pasting into the HTML Editor.

**Hyperlinks** - No hyperlinks should be created in Word. Instead the author should use a **plain-text placeholder** for all citations within the narrative using the following naming convention:

[Document Title, Page #, Date]

Hyperlinks will be created within the SPOL text editor once the author has completed their draft in Word (see the following sections of this guide for more information). Hyperlinks created in Word and copied over to the SPOL text editor will not transfer.

**Documents** – Documents used to support the author’s narrative will need to be uploaded to the SPOL document library. Documents should be named based on the following naming convention:

- Capitalize the filename using standard title-style format (i.e. “The Cat in the Hat”)
- Use spaces between words; no dashes (-) or underscores (_)

Once documents have been uploaded to document library, hyperlinks can be created within the SPOL text editor. All documents should be saved as Adobe Acrobat (PDF) files unless special circumstances prevent the use of the PDF format (see the following sections of this guide for more information).
**Tables** - Resize all tables to a width of 6.5” or less. A document formatted with the proper margins (listed above) will automatically configure the editable text area to 6.5” wide. Any table that fits the width of a single page in this configuration will be within the correct size limits. Make sure there are no hidden rows or columns in tables, because they will display when placed in SPOL.

**Images** – Images cannot be copied/cut and pasted into the SPOL **HTML Editor** but instead will have to be uploaded within the editor. This includes any charts and/or graphs made within Word. The chart/graph will have to be saved as an image and upload separately.

The following formatting and graphics are not supported in HTML, including:

- Tables placed on the page in landscape view
- Text that runs in any direction other than left-to-right
- Graphical elements created with Word tools, including shapes, SmartArt, charts, graphs, and WordArt.

**Bullets** - All text should be left indented except for bullets. Bullet indentation should be the 0.25 inch (the standard setting in Word). All text following the bullet should be aligned and indented at 0.5 inches. Do **not** use the bullet and number tool within the text editor.

**Paragraph Spacing** – Paragraphs should be spaced with a 12pt. setting in the “After” spacing option in Microsoft Word’s **Paragraph** settings menu. Do not add indentation to begin a new paragraph or additional line breaks between paragraphs. Please remove any additional spacing that may be added to the narrative text when it is copied to the **HTML Editor** in SPOL.

**General Content Style** – Please adhere to the following general writing principles when constructing a standard narrative in order to maintain a high degree of quality and professionalism, as well as uniformity with other standard narrative writers:

- Understand your audience. Please think like a reviewer who will read your narrative, but is unfamiliar with Florida State University, its programs, its organizational structure, etc.
- Do **not** write in future tense.
- For narrative subsections with headers, the subsection title should be bold-faced, left-aligned.
- Spell out acronyms first before referring to the acronym. After this, you may use the acronym without prior spelling.
• Each core requirement, comprehensive standard, and federal requirement should stand on its own. Do **not** refer to the substance or language of another standard.
• Address all types of programs (e.g., distance learning, off-campus sites, etc.) in addition to main campus programs, where applicable.
• Please note: implicit in every core requirement, comprehensive standard, and federal requirement mandating a policy or procedure is the expectation that the policy or procedure is:
  1. in writing and has been approved through appropriate processes
  2. published in appropriate institutional documents accessible to those affected by the policy or procedure
  3. implemented and enforced by Florida State University

This is closely enforced for the following standards: CR 3.2.3 (Board Conflict of Interest); CR 3.2.5 (Board Dismissal); CS 3.7.5 (Faculty Role in Governance); and FR 4.5 (Student Complaints).
• Reviewers will be reading, reviewing, and checking hundreds of pages. Be thorough, but concise.
• Do not use terms like “however” or “although” or others that denote we are lacking or there are exceptions to certain elements; just explain them.
• Everything that is included in text must have collaborating evidence if requested.
• Do **not** add the Core Requirement, Comprehensive Standard, or Federal Mandate to the beginning of your narrative. This text will be added automatically.