Tips for Developing Policies

The objective of policies is to document the organization and operational structure. Policies lay out long-term goals and processes by creating structure through rules and guidelines. Most policies are a natural outgrowth of the decision-making process. It should incorporate the careful thought, the good judgment and valuable experience of all who have faced problems or decisions in a particular policy area. This process should eliminate the irrational, illogical and unfair decisions that have contributed to inconsistent application of the organization’s policy. Use a consistent format for all policies.

Items to Consider

✓ A policy serves as a basic communications tool.
✓ A policy is an excellent training resource.
✓ A policy serves as written documentation.
✓ A policy saves time.
✓ A policy helps manage complex operations.
✓ A policy fulfills an employee’s right to know.
✓ A policy is an organization’s roadmap to compliances with laws, rules and regulations.

Action Steps

1. Find a template that fits your organization.
2. Document the policy in writing.
3. Include the inception date and any revision dates so that there is no mistake about which version is current.
4. Ensure that the policy is compliance with federal, state, and local regulations.
5. State the purpose of your policy.
6. Consider obtaining feedback from employees, customers and other stakeholders about what should be in the policy.
7. Set out in clear and simple terms what your policy is for, how it is to be carried out and by whom.
8. Keep it simple – one to two pages are usually sufficient.
9. Clearly communicate policies to employees and other stakeholders to create buy-in. Acknowledge feedback.
   a. Hold an orientation meeting.
   b. Distribute a copy of all policies to employees. Include when employees need to sign a copy.
   c. Post information in common areas.
   d. Train and mentor employees.
10. Make sure policies are being followed.
    a. Perform audits and document results.
    b. Assign a person to be responsible for tracking progress.
11. Change and update policies as necessary.