



Developing Policy

Writing policies that are meaningful, effective, and enforceable by management and staff is difficult and takes time. Therefore, it is wise to follow an agreed process that ensures you are spending your valuable time and resources on good policy, which the workforce understands and is committed to.

Steps to formulating policy:

1. Appoint a special committee or policy development working group.
2. Identify the broad policy areas and then prioritize when each policy needs to be written.
3. Agree which policy you are writing and brainstorm the issues involved.
4. Conduct research about the issue, e.g. legal issues, practice issues, resource issues.
5. Prepare a draft policy.
6. Circulate the draft to key staff and stakeholders for comment.
7. Amend or revise the draft.
8. Recirculate a final draft.
9. Present a report to the board about the policy, implications for the organisation and what feedback has been received in the consultation phase.
10. Ask the board to ratify the policy when they are satisfied with the final draft.
11. Insert the policy in the Policy and Procedures Manual.
12. Implement a training and communication strategy to ensure that staff and volunteers have the knowledge and skills to implement the policy.

You may need to write a related procedure, forms or checklists that describe exactly how to carry out the policy.

Good policy

Good policies:

- are written in clear, concise, simple language
- represent a consistent practice and decision making framework
- are compatible with the organisation's values
- are easily accessible and understood
- address what the rule is, rather than how to implement the rule
- are regularly reviewed and updated with changes communicated to those who are affected by them.

When writing a policy, always use simple words and concepts. Speak directly to the people who will be reading, enforcing, and living by the policy. Keep the policy short (usually 1 page) and use bullet points and subheadings to make it easy to read.

Policies often begin with a Policy Statement. This statement should state why the policy has been developed.

After writing a policy, decide who will be affected by the policy and select the best way to write down or communicate the policy to them. The layout, style, designs, and presentation of the policy is just as important as the text. You must make your policy easy to read. Long paragraphs, crowded pages, poor use of white space, and poor print quality all discourage or confuse the reader. While typically policies are written in text in a document, there are other ways to communicate your policies which are just as, if not more, effective. They include using posters, pictures and flowcharts, DVD, webinars and an intranet.

Finding the right words for policies can sometimes be challenging. The main rules include keeping it succinct and avoiding jargon. Only use “shall” for mandatory issues and actions.

Use “may” when actions are optional or need to be assessed in different circumstances.

Avoid extreme cases, and aim to write balanced and consistent instructions which give your workforce guidelines which are not restrictive. If the policy is lengthy or complex, create an Executive Summary with the main points summarised at the beginning of the document.

Language

Policies should use language that is:

- succinct
- unambiguous
- simple - plain English, active voice, avoid acronyms
- free from jargon, clichés, unfamiliar words and phrases,
- free from unnecessary technical expressions, with technical expressions where used
- set out using short sentences
- factual
- future-proof - avoid information that may become outdated quickly.

During the policy writing process, remember to consider the constraints which impact on the organisation. There may be constraints in the organisation’s constitution, in funding guidelines, or with the availability of training or resources, that affect what the policy contains. Sound policy making recognises these constraints and uses them to produce policy that is reflective of the real world. Nobody respects a policy that is idealistic or impossible to adhere to!

Five questions to ask when forming a policy

- Does this policy reflect our values, ethics and priorities?
- Have we considered the legal requirements?
- Does the policy reflect reality?
- What does the policy promise, and can we deliver it?
- Will everyone understand this policy?

The board may decide to pass the final draft on to a legal expert before ratifying the policy and disseminating it. They may also decide that staff need some training in understanding and implementing the policy. For instance, if you write a policy that requires all staff to have a First Aid Certificate, you will need to make sure that staff know what this is, where and when they should obtain it, and who is expected to pay for it.

The board should approve written policies and procedures governing the work and actions of the organisation's workforce

The environment is always changing, so it is important to ensure that policies are reviewed regularly so they continue to meet best practice. 'Best practice' is the current recommendation about the best way to manage and deliver services.

Most organisations put all their policies and procedures together and call it a Policy and Procedure Manual. This manual is the result of many hours of thinking, analysing, researching, writing and re-writing, so you may find that your Policy and Procedure Manual is 'a work in progress' and is continually being updated or revised. For this reason, manuals need to have a quality control system to inform staff which version is the most current and when a specific policy within the manual has been changed or made obsolete.