Creating Policies and Procedures

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Goodwill

Creating Policies and Procedures

Well-written policies and procedures are essential as they provide clear guidelines and instructions for our Team Members. The goal of this job aid is to establish standards for creating policies and procedures.

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Glossary

Company - Once the company is introduced, it is called "the Company."

Policy - Establishes the rules for the Company; sets clear expectations of the behavior, performance, and compliance standards required of Team Members and the Company.

Procedure - A detailed set of step-by-step instructions defining how a particular task or process is executed within the Company.

Team Members - We refer to our staff as Team Members, and both the "T" and the "M" are capitalized in each word.

Pronouns- The use of pronouns should be gender neutral, they/them instead of he/she.

Guidelines

The company is introduced as follows:

Goodwill of Central and Northern Arizona (GCNA) and its affiliated entities (Collectively, the "Company").

Acronym use:

When using an acronym, add the complete name of the acronym before referencing an abbreviation. Example: Retail Operations Center (ROC).

Language expectations:

Leaders drafting the policy or procedure are considered the subject matter experts. They should consider how to make each of their documents user-friendly and consider whether someone with zero experience with the function or the organization would be able to understand the policy or procedure.

Personalization:

Policies and procedures should not be personal. Avoid instructions such as "you do x." Instead, we should say "the Company expects", or "Team Members are expected to" when writing policies and procedures.

Vocabulary use:

Vocabulary used in policies or procedures should be simple and direct and geared towards an elementary-level reader.

Steps for Creating Policies and Procedures

Step 1 - Identify the necessity, not the want.

Include the following items:
- Why do you need it?
- Who needs it?
- Who is responsible for enforcing and following?

These things will help you define the structure and length of the policy or procedure.

Step 2 - Define your entry paragraph.

Don't worry about all the other steps or sections. You will most likely adjust your entry paragraph multiple times as you create content in the policy body. The idea is to record your general thoughts on the policy's "why's" and "how's."

This is a general statement, so too much detail at this point will muddy the process. Keep it simple and to the point. It would be wise to see existing, approved policies and review those entry paragraphs. In most cases, your's will mirror the basic structure and some verbiage. We call the entry paragraph the "Policy Statement." In this introduction, you are stating not only the policy, but also why you and the organization require it.

Step 3 - Create flow and organize thought.

Take the bullet points you made in Step 1 and define them to give them body and purpose. You DO NOT need a final product here. Remember this is the first step and there will be revisions before you have the final product. Can someone who knows nothing about the process you are working on understand it by reading what you have written? Keeping it simple is always the best. Seek feedback from others on your document.

Step 4: Finalize your document for final approval.

Ensure the format is correct, including usage of approved font, grammar, etc. Has your team reviewed the document, and did you get their final approval?

NOTE: It is HIGHLY recommended that you partner with someone who can identify and correct grammar issues before you submit them for approval.

Workflow Process

> The Department Submitter creates a draft of a new or updated Policy or Procedure.

> The Policy or Procedure is sent to Department Head for review and approval.

> The Department Head reviews and approves the Policy or Procedure.

> The Policy or Procedure is sent to the Policy and Procedure Steering Committee for review.

> The Policy and Procedure Steering Committe reviews and approves the policy or procedure.

> The Policy or Procedure is published on the Policy and Procedure site.

Things to Keep in Mind.

- Practice makes perfect. You will not be a master of policy writing the first time you do it, so don't get discouraged.

- Don't be afraid to ask for help. Reach out to your HRBP or open an HR ticket.

- Allow yourself time. Trying to rush will cause unnecessary errors and reflect poorly on the author.

NEED HELP?

Contact your HRBP, or open an HR ticket using this link:

https://support.gwaz.org/plugins/servlet/desk/portal/11