

Policies and Procedures

CREATIVITY

**THE ART AND SKILL OF WRITING
POLICIES AND PROCEDURES**

DEFINITIONS

POLICIES

- Express rules, expectations and requirements
- Explain what to do
- Are realistic and attainable
- Have an active voice (subject-verb-object)

PROCEDURES

- List steps to follow
- Tell “how” to perform a job
- Have an active voice and are imperative

EXAMPLES

POLICY

- We provide one week's vacation after one year of employment and two week's vacation after five years of employment.

PROCEDURE

1. Complete form VR-1.
2. Submit form VR-1 to your supervisor one month before the desired time off.

WRITING SKILLS

Say what you mean and mean what you say.

- Be aware of all possible interpretations.

For example: Turn the handle to the left.

Use specific language

For example: Keep the acid cool.

Consider the Reader/Users

- Don't assume anything`

For example: Hammer the nail.

- Look at the experience of the user.

EXERCISE 1

POLICY EXCERPTS

1. The attending employee should report all suspected cases of communicable disease to the Medical Officer of Health.
2. All requests for leave, as provided in the company handbook, will be submitted by the requesting employee to his or her supervisor for approval.
3. If the client is under fourteen years of age, the consent can be signed by the parent or guardian.
4. The Housekeeping Department should be responsible for carrying out the standard of operating procedure and methods necessary to maintain the building at a high level of sanitation and visual appearance.

EXERCISE 2

PROCEDURE EXCERPTS

1. Check each report to ensure information is complete and it contains accurate information.
2. If time permits, glass shelving is always in need of dusting.
3. Eye check windows and remove any visible spots or streaks that are seen on them.

QUESTIONS

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WRITING SKILLS

Watch out for *Weasel Words*

- *Weasel words* are words that sound as if you're trying to wiggle out of a commitment.

*For example: Part A **ought** to fit into Part B.*

- They can be used for flexibility where appropriate.

*For example: In extreme conditions, management **may** take alternative action.*

Use short words and short sentences

- The *Gunning Fog Index* defines a difficult word as any word of three syllables or more. Stick with words of one or two syllables.
- Aim for a maximum of 15 words per sentence.

*For example: Write, 'Use form R-31 7b'; do **not** write, 'Use the appropriate request form'.*

EXERCISE 3

1. An employee using air transportation may be authorized by the supervisor to engage in a rental car in the destination city for transportation when the cost is less than that of taxi fare or enables the traveler to accomplish company business in a more efficient manner.
2. All rental car reservations must be made through the company's affiliated travel agency.

STEPS FOR THE DEVELOPMENT OF POLICIES AND PROCEDURES

1. Assess the Need
2. Research Best Practice
3. Develop a Writing Plan
4. Draft and Edit the Policy and/or Procedure
5. Obtain Approval
6. Engage in Communication and Education
7. Practice Review and Revision

FORMATTING DECISIONS

- Font and size
- Full margin justification or left only
- Will the same font and size be used for headings?
- How will headings and subheadings be identified?
- Line spacing between paragraphs and points, headings and subheadings
- Numbering of steps and substeps
- Expression of time
- Will numbers in the text be words or numerals?
- Identification of abbreviations
- Tense and tone used

MANUAL DEVELOPMENT

- Introduction
- Index
- Table of Contents
- Numbering System
- Approval Process
- Reviews and Revisions

QUESTIONS

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REFERENCES

Campbell, N. J. (1998). *Writing Effective Policies and Procedures*. New York, NY: AMACOM

Cryderman, P. (1999). *Customized Manuals for Changing Times*. Ottawa, On: Canadian Healthcare Association.

Page, S. (2004). *7 Steps to Better Written Policies and Procedures*. Westerville, OH: Process Improvement Publishing.

Page, S. (2004). *Achieving 100% Compliance of Policies and Procedures*. Mansfield, OH: BookMasters INC.

Page, S. (2005). *Best Practices in Policies and Procedures*

USEFUL RESOURCES

Writing Effective Policies and Procedures by Nancy J. Campbell: ISBN # 0-8144-7960-X.

Customized Manuals for Changing Times by Paula Cryderman: ISBN # 1-896151-38-8. Place order by e-mail, custserv@cha.ca.

Steps to Better Written Policies and Procedures by Stephen Page: ISBN # 1-929065-24-8. Author's web site: <http://www.companymanuals.com/writingformat/index.htm>.

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USEFUL RESOURCES (con't)

Achieving 100% Compliance of Policies and Procedures by Stephen Page: ISBN # 1-929065-49-3. Author's web site: <http://www.companymanuals.com/compliance/index.htm>.

Best Practices in Policies and Procedures by Stephen Page: ISBN #: 1-929065-07-8. Author's web site: <http://www.companymanuals.com/bestpractices/index.htm>.

Northern Lights Health Region Website: www.nlhr.ca

