

Writing Effective Policies and Procedures



CharityVillage.com®
Campus

Module One – Introduction

- Course navigation
- Course guide
- Explanation of course resources
- Course objectives
- Why do you need policies and procedures?
- Course modules overview
- Review of module one

Module Two – Definitions

- Defining policies and procedures
- What is a policy?
- Board policies
- Typical board level policies
- Management policies
- Policies in smaller organizations
- Defining procedures
- Resource: Comparison of Policies & Procedures
- Resource: Sample Policy & Procedure Wording
- Quiz (x5)
- Review module two

Module Three - When to develop policies and procedures

- Introduction to module three
- To write or not to write? What to consider
- When should you develop a policy/procedure?
- What's an important issue?
- What subjects may need a policy or procedure for clarity?
- Resource: Do we need a policy or procedure checklist?
- Quiz
- When is it okay to leave policies unwritten?
- When it's not okay
- Quiz
- Review module three

Module Four – Creating a policy or procedure

- Introduction to module four
- The nine steps in creating policies and procedures
- First three steps: plan, research, brainstorm
- Quiz

Module Four Continued

- Second three steps: outline, first draft, consult
- Quiz
- Last three steps: final draft, final approval, implementation
- Resource: Steps in creating a policy/procedure
- Resource: Mind mapping
- Quiz
- Use consistent formats
- Resource: Sample policy format
- Quiz
- What to include in a procedure
- Resource: Sample procedure
- Formats for procedures
- Resource: Procedures formats
- Quiz
- Review module four

Module Five – User-friendly policies and procedures

- Introduction to module five
- Setting the right tone
- Examples of setting the right tone
- Resource: Writing practice
- Quiz
- Introduction to simple writing techniques
- Simple writing techniques (x5)
- Quiz (x2)
- Resource: Simple writing techniques
- Quiz (x2)
- Making the layout and appearance more user-friendly
- Ways to add emphasis
- Resource: Layout ideas
- Review module five

Module Six – Practical manuals

- Introduction to module six
- Physical design considerations
- Paper and production considerations
- Quiz
- Resource: Manual design considerations
- Essentials: table of contents
- Resource: Table of contents sample
- Additional references
- Wrap-up

Writing Effective Policies and Procedures 2

Module Six Continued

- Essentials: Index
- Optional sections
- Quiz
- Review of module one

Module Seven – Implementing policies and procedures

- Introduction to module seven
- How to notify users
- Best ways to get compliance
- Quiz
- Updates and changes
- Review module seven
- Course module review
- Additional references
- Wrap-up