

Policy and Procedure Pre-Writing Checklist

- Find out if your organization offers resources, such as legal counsel or a dedicated policy management office, to help plan and write your documents.
- Develop a document charter and ensure that your c-level team supports and endorses your efforts.
- Clearly define why you are developing your policies and procedures and ensure that management agrees with the objectives.
- Select a standard policy template. Your organization may supply a custom template or look for a commonly used template for your field or any standards your work is governed by.
- Select a technology to manage parts or all of the drafting, approval, training, version control, and dissemination.
- Consider forming a policy management team with representatives from all parts of your organization.
- Specify a policy owner to track actions on the policy development and subsequent updates.
- Define the responsibilities of policy and procedure owners.
- Consult with the policy team or affected stakeholders to prioritize the list of policies to be written or updated.
- Outline broad policy categories and then note the policies needed in each category.