

The Fine Art of Policy Manuals

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The process of writing a policy manual can appear somewhat daunting if you're just starting with a blank page. But it doesn't have to be. With a little thought and planning you can develop a manual that will work well for your organization.

Many policy manuals grow from humble beginnings with policies often being created out of necessity when something has gone awry. Although this is often a typical approach, it is better to take a more proactive stance.

Documenting your current employment practices is a good start, but it is also important to ensure you have the basics covered. If just starting, a typical policy manual would include topics such as vacation, absences (including illness, leaves of absence and other time away from the office), hours of work, overtime, statutory holidays, harassment and discrimination, technology usage and confidentiality.

A policy manual, however, doesn't have to be limited to just employment practices. Focus also on the positive things your organization has to offer. Employee programs such as educational assistance, computer loans or professional memberships are beneficial items to include.

Before you begin writing your policy manual, it's important to first take a look at your organization's culture. The culture says a lot about how the policy manual should be written. A rigid and formal policy manual with unwavering procedures may not work well in a more creative and entrepreneurial environment. In this situation, a policy manual written as "guidelines" may be better received and followed in your organization.

Another important factor to consider is your workforce. What types of positions do you have? What are the typical issues that arise? For example, in a manufacturing environment with an hourly workforce, certainly hours of work, breaks and overtime would be important policies to ensure you have in place. Consider also the composition of your workforce. This can play an important role in determining how rigid your policies need to be and how much detail needs to be included. With some policies there may be differences in eligibility between full-time and part-time or hourly and salaried staff. Make sure you indicate these distinctions.

The final factor to consider before starting to develop your policies is determining how the policies will be carried out. If managers are acting autonomously, without the benefit of a central resource to discuss interpretation or provide guidance, then detailed procedures may be warranted.

A policy manual should be an on-going work in process. As legislation changes, you may need to make amendments. Keeping policies, one per page, makes it easier to update. Many companies are also moving their policies to an on-line format. This format is fine as long as all employees have easy accessibility to the on-line version and that employees are advised of changes or amendments to the policy manual appropriately.

So, where do you start? Using the Internet is a good place to get some ideas of policy styles, format and wording, but use caution in just adopting them for your organization. Many of the sources are U.S.-based and may not always be alignment with provincial or federal legislation. In Ontario, you can check relevant employment legislation through the Ministry of Labour, <http://www.gov.on.ca/LAB/>. The Ministry has worked hard to make the web site more user-friendly by creating "Fact Sheets" for many typical employment situations. This will prevent you from have to wade through and interpret legislation in the Employment Standards Act, 2000 (which is also available on-line).

Employment Standards representatives can also answer your questions via phone or e-mail to help you with situations specific to your organization. As an alternative, you can also get outside help. There are a number of organizations that can produce a policy manual for you. This may be a good option if you are just starting or want to ensure your current manual is legislatively compliant.

Having a good understanding of your organization and ensuring the basics are in place will go far in helping to develop a manual that will work well for your organization.

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