

Sample Policy & Procedures

WHAT IS A POLICY AND PROCEDURES MANUAL?

A policy is a blue print or general guideline for action. Often, policy development in organisations is ad-hoc and not recorded. People agree on policies and try to remember them but people do not always remember the same things and unwritten policies often lead to confusion and conflicts.

Documenting policy and procedures provides a consistent base from which to manage all the operations of an organisation including service management, staff management and service delivery. The documentation can then ensure consistent practice throughout the organisation.

Policy and procedures should be readily available to all people involved in the management or work of an organisation and should be kept in a loose leaf file or on a computer system so it can be updated and added to, as policies and procedures are reviewed and amended.

HOW TO USE THIS MANUAL

This Example Policy and Procedures Manual for SAAP Services has been developed to provide SAAP funded services with a template for developing policy and procedures specific to their service. Using these materials as a starting point will save services many hours of staff time in documenting their services.

The policies and procedures in this Manual have been separated into twenty six sections.

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|-------------------------------------|---|
| 1. Organisation Overview | 15. Occupational Health, Safety and Welfare |
| 2. Incorporation | 16. Safe and Secure Environment |
| 3. Service Management | 17. Accidents Incidents and Hazards |
| 4. Funding | 18. Fire and Emergencies |
| 5. Records Management | 19. Principles of Service Delivery |
| 6. Service Planning and Improvement | 20. Duty of Care |
| 7. Assets Management and Insurance | 21. Access to Services |
| 8. Financial Management | 22. Rights and Responsibilities of Clients |
| 9. Information Technology | 23. Entry Screening Assessment and Support Planning |
| 10. Office Procedures | 24. Coordination with Other Agencies and Referrals |
| 11. Staff Recruitment | 25. Client Fees |
| 12. Staff Management | 26. Working with Young People |
| 13. Staff Development | |
| 14. Volunteer Management | |

The example material has been written for a hypothetical women's accommodation service - Acorn Support Services. In addition, examples of service delivery policy and procedures (sections 19 to 26) have been provided for the following service types:

- Family Services
- Meals Day Centres
- Single Adults Services
- Outreach Services and
- Youth Services.

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Book Descriptions:

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Book Descriptions:

company policy and procedure manual template

You can use a policy and procedure template to make decisions and provide a framework for the organization's activities. Policies and procedures often come together although they have different purposes. For one, policies refer to highlevel guidelines used to define an organization's culture. Organizations need them for making decisions and to provide a framework for its activities. Conversely, procedures refer to lowerlevel processes. These provide steps for the employees to follow so they can adhere to the policies of the organization. This is an important management tool that employees need to get acquainted with. All policies and procedures examples state the company's guidelines and goals. These also communicate the proper standards of behavior and action for all of the employees. All policy and procedure manual templates include the company's best practices, the core descriptions for business processes, and the standards and methods on how employees should do their work. Usually, in manual form, a company policy template helps you standardize employee training so you can concentrate on the company's growth. Company policy examples are all about effective communication of standards between employers and employees. Here are some reasons that show the importance of this document It keeps your employees in the know A company needs a manual as a reference in the management of daily business processes. When you document standards, you can easily communicate with the employees on what's relevant in the company's growth, customer satisfaction, and quality. Moreover, the presence of a policy and procedure document helps employees know what to do when anything unexpected occurs. It keeps your company protected Another great benefit of having a policy and procedure template is that it will protect the company from any possible employee fraud or legal action.<http://www.pyatnishko.kz/userfiles/case-jx-90-workshop-manual.xml>

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You should pay attention to the contents of the manual as it contains the steps to take for disciplinary actions or other actions in different business predicaments. Company lawyers can resort to the document to check if there are any legal problems that need attention or if the company follows the state and federal legal requirements. It helps your company avoid inconsistencies You can always refer to a wellwritten company policy template if your team, with clear instructions from the management, have to deal with specific work concerns. Clearly stated policies and procedures help maintain the desire of the company to make impartial and consistent decisions. You can use it as a tool for training In itself, you can use the policy and procedure manual template as a training tool as it already informs the employees about their positions in the company's overall structure. It informs the employees where and who to approach when they have concerns or questions. For new employees, the manual can help them start their work on time. Effective policies and procedures examples describe important tasks to perform daily and all employees must accomplish such for the company to operate efficiently and safely. All businesses and organizations regardless of size or type may benefit from a policies and procedures template. Here are the most common fields that will benefit from clearlydefined company policy examples Construction The manuals here include the training and orientation policies, refusal of work policy, time reporting policies, and more. Education For this type, the manual includes the tenure policy, code of ethics policy, credit hour policy, and more. Healthcare Some examples include the cellphone policies for providers, notice of nondiscrimination in health insurance policy, and appointment policies. Human Resources The

department provides a lot of the policies necessary companies. <http://magyarifjak.org/upload/case-jx70-owners-manual.xml>

Examples include antidiscrimination policy, termination policy, timeoff policy, and more. Emergency Services and Law Enforcement Some examples include the drone policy, body camera policy, emergency communication policy, and others. Office Management Some examples include petty cash access, afterhours calls, supply cabinet access, and more. Nonprofits These include volunteer insurance, recruitment, selection, expenses, and so on. This not only applies to large companies who need it so that the different departments can work effectively but also to small companies too. Whatever reason you may have for creating your own company policy template, this document should possess the following characteristics Efficient Avoid overcomplicated explanations when counting for every possible scenario. Each defined step should exist for a reason. But don't oversimplify things as you might end up omitting important information. Measurable When you develop each activity, make sure that there is always some relevant measurement that goes with it. This can be as something as simple as a checkbox to indicate completion or as complex as you need it to be. Shared You should store your policy and procedure manual template in common areas accessible only to those allowed to view them. This could be a filing cabinet, a binder or even an online shared site. Current Policies and procedures may change depending on the needs of the company. You should have a review process for this document. After the changes, discard old copies or mark them as superseded. Tested Generally, you should first test a procedure before publishing it. The test should include the concurrence of everyone involved so they can attest to its success. Creating a policy and procedure template can take effort and time but you can improve on this by keeping a few basic information in mind. Most of the work to create one happens even before you've started to write anything.

These prewriting activities may include researching the background and deciding on the focus of your document. After writing the draft of your policies and procedures examples, you need to have them reviewed, validated, and approved. Lastly, disseminate the document then train employees in the new policies and procedures. Keep the following in mind before you start writing your company policy examples A policy or procedure should focus on one concept at a time. Because of the effort needed to develop effective policies and because of how they affect the values of your company and potentially may have legal consequences, make sure that your employees support and endorse your efforts. Support the policy with employee education and training. Don't expect employees to just read the information and remember everything. As you start training, give the employees a good reason to learn the new guidelines and follow them. Consider using an online policy and procedure For the past few years, companies have actively examined their decisionmaking processes with the aim of finding a decisionmaking authority at the lowest levels. This makes employees confused as they do not know what's important. Policies and procedures that exist aren't always updated, giving employees a hard time to locate documents needed to make informed decisions. However, an uptodate, online template permits access to employees who use or are directly affected by the policies and procedures to have access to them. It's more economical Presently, individual departments must dedicate their resources to maintain files of important policies and procedures. At the same time, such departments responsible for policies must correspond to requests for policy documents as other individual users might need these. Because of this, they will use already scarce resources within their departments which might be better assigned to other activities.

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If written policies and procedures were readily available from a single department or position within the company and identifying such department in the policy to which queries can get directed, this could result in a number of benefits. It improves responsiveness The quick updates and dissemination of procedures allow the company to meet the changing needs of the customers and to

adjust to new environments. It prompts accountability One of the foundational elements of a system in which units and individuals are directly responsible for adherence to is the use of clearly written and available policies and procedures. A policies and procedures template can easily become outdated even if there is an effective policy review process if it isn't coupled with effort. There should be a department in charge of maintaining and distributing policy records as well as updating procedures. This makes your effort in creating the document more rewarding. TemplateLab is not a law firm or a substitute for an attorney or law firm. Use of TemplateLab is subject to our Terms of Service and Privacy Policy. Soon to be by Smartsheet. There's no denying that documenting policies and procedures takes time, effort, and people skills, but luckily, templates can alleviate this stress. This article is your onestop shop for everything policies and procedures related. We'll explain what policies and procedures are and the best way to prepare for, write, and implement them. To simplify your documentation process, we've also included free, downloadable policy and procedure templates for education, IT, and small business. Search online for samples that may be pertinent to your industry. You can also use a template to save time and effort. Below you'll find nine free, downloadable, usecase specific templates to get started. IT Policy and Procedure Template Clearly defined IT policies and procedures can prevent privacy and data breaches. After an IT security event, policies can aid in disaster recovery.

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Depending on the size of your organization, you may have one document or several documents. Consider adding guidance and steps to this Word template for software and hardware purchases and approved models and versions. Add your own device, visitor policy, password policy, security events, and any considerations pertinent to your company or organization. Download Word Template Try Smartsheet Template. Education Administration Policy and Procedure Template Higher education policies and procedures can apply to different groups, including staff, students, and visitors. Policies can set expectations for aspects of the job such as behavior and course quality, or for tangibles what equipment can be purchased, from what vendors, and with what process. Your institution may publish its own templates and style guide on its website. Use this template in Word to determine your needs. Download Word Template Try Smartsheet Template. Basic Policy and Procedure Template This is a basic policy and procedure template that you can customize to include the sections and content best suited to your organization. The table of contents section will update as you add to the content in the rest of the document— simply click Update Table in the Table of Contents group on the References tab. Download Basic Policy and Procedure Template Word Change Management Policy Template Managing change can be critical to the efficiency and success of your business. With this change management policy template in Word, you can describe the change, its scope, and the roles involved in the change. Detail change management risks, policies, and procedures. Download Change Management Policy Template Word Data Governance Policy Template This data governance policy template can be a crucial part of building policy for your organization. Data governance helps you figure out who has access to your data, your data usage particulars, how data is integrated, and how data is protected.

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Download Data Governance Policy Template Word Key Remote Access Policy Elements Template Increasingly, employees and other contributors wish to work off site or remotely. While this practice may enhance employee productivity, it presents extra considerations for network and data security. Use this checklist in Word to draft a remote access policy. Considerations include devices used remotely, locations of use, such as home or public areas, secure work areas, and more. Download Key Remote Access Policy Elements Template Word Onboarding Process Template Onboarding, the process of bringing a new employee into an organization, can start with the recruiting process and continue well beyond the initial hiring — for example, to include notifying IT about access

requirements and explaining company culture. This onboarding process template describes what to consider before an employee starts as well as what to think about during their first day, week, month, and at their threemonth review. Download Onboarding Process Template Excel Small Business Policy and Procedure Template Even if you only employ a few workers, you are still responsible for their safety and wellbeing as well as the security and maintenance of material assets. Customize this small business policy and procedure template in Word to suit your company. Be sure to consider policies and procedures that cover such things as harassment, nondiscrimination, workplace safety, smoking and alcohol or drug use, and IT best practices and security. Download Small Business Policy and Procedure Template Word Construction Policy and Procedure Template One of the key aims of construction policies and procedures is to ensure worksite safety. Construction documentation provides for such things as employee safety training, inspections for hazards, and managing emergencies. Complete this template and train all employees in its provisions so all staff are prepared before an incident occurs.

Download Construction Policy and Procedure Template Word Policies offer structure for consistency, and also ensure compliance with organizational values and goals as well as regulations and standards. Policies are generally set by upper management. A policy document should describe what the policy does and why it is necessary. It should also explain which individuals, roles, or departments are responsible for writing, reviewing, implementing, and managing the policy. Procedures are usually performed by employees and describe who should perform specific activities and how to complete a task. By contrast, a process describes how procedures across the entire company align with one another in order to realize a product or service. Processes should also detail who is responsible, and ensure that the necessary tasks are completed properly and on time. Policies provide a structure that can define your organization's culture, and welldefined policies can offer a path to achieving longterm goals and even pursuing continual improvement. Policies can also help your organization reduce or avoid risk. In addition, policies can guide the way to regulatory compliance. Procedures show the steps that employees must take to implement those policies. They can give clear guidance on what to do in particular sets of circumstances in order to avoid improvising solutions. Policy and procedure templates can help. Here are the major steps for writing effective policies and procedures Preparing to Write You can make your policy and procedurewriting process more efficient by treating the activity as a project and ensuring you get management support. That way, time and resources will be available to you. Because policies and procedures often involve legal and regulatory consequences, consider having documents reviewed by legal counsel. Having a clear understanding of why a policy is necessary is also vital to keeping the project focused.

Choosing an appropriate template for your field or industry will help you gain a better understanding of what content you need to add, and can also relieve you of the need to design a template. Moreover, if your organization has the means, a document management and tracking system can help you track revisions and publish the document in a place that is accessible to those who need it. Writing Your Documents To write your documents, begin by reading current policies and procedures, if any exist. Also, review any compliance or regulatory guidelines that apply. Especially when creating procedures, it's essential to consult the people who will use the procedures and perform the work, so they understand the steps in a workflow. Consulting employees on the creation of documentation is one of the best methods for ensuring their interest in and use of procedures. After you draft the document, verify its accuracy by walking through the steps. Have those affected by the document evaluate the document. Finally, get approval for and sign off on the document from the highest level of management you can, such as a CTO or CEO. Implementing Policies and Procedures To encourage the success of a document, plan its implementation. Publish the document in one central location, such as on a company website. Employees should sign off when they have read the document. Create a training plan to support the new policies and

procedures. Then, establish a review cycle so that new regulations and practices can be incorporated into your documents to keep them relevant. If your organization keeps a style guide and inhouse glossary, use it. Consider these tips Use terms and definitions consistently. Explain acronyms. Use plain language rather than jargon. If you must use jargon, explain it. Use inclusive and genderneutral language. Provide general information where possible.

For example, provide a general departmental phone number, rather than the mobile phone number or office number of an individual who may change jobs. Be clear about required actions versus optional actions by choosing the correct words. The words must and will indicate compulsory actions. The word may suggests an optional action. Write in short sentences with plain words. Write in active voice rather than passive voice when possible. Consider the following structural tips for your policies and procedures Linking Hyperlinks to external reference documents and internal sections make it easier for users to find documents. Naming Documents Use clear and consistent names for documents. Headings, Numbers, and Bullets Especially for long documents, consider using clear, short subheadings to describe the topic, using numbering sections and paragraphs, and using bulleted lists. In general, limit subdivisions to three levels. Certain standards and fields also publish templates online. Depending on your experience with your organization's document management platform, you may be expected to compose the document in a word processing program and then send it to be uploaded online. Your organization may also specify references to keep tone and language accessible and inclusive as well as clear, correct, and concise. If you have any legal concerns about what to include in your document, ask to speak to your company's legal counsel. For legal questions, you can include a contact email with the policy and procedure templates you post online. However, in general, the document should serve your organization, not the other way around. Customize your content to support your situation. You may have separate policy and procedure documents or one large document.

The following are some of the possible policy topics Basic Sections Document Header Header information, also called meta information, includes the policy title, policy number, revision dates, publication dates, approver's signature, and department. Purpose This explains what the policy is about and the reason for having the policy, such as how it promotes compliance with standards or regulations. Policy Statements Describe the overall framework for the policy and its intent. Definitions Define terms in your policy, especially words and phrases with multiple meanings. Definitions make policies clearer and can be important if the organization ever faces litigation. Table of Contents Whether your document is published online, made into a PDF, or printed, a table of contents aids users in quickly finding information. Hyperlinked tables of contents are a helpful feature of electronic documents. Policy and Procedures Details of the policy and procedures may be included in one document. Scope This describes the individuals, departments, or groups to whom the policy applies. To increase clarity, describe any employees or others to whom it does not apply. Responsibilities To ensure compliance, specify which roles are responsible for creating documents and reviewing documentation and activities. Additional Sections Organization Chart An organization chart can show how departments and individuals relate to one another. Dress Code Discuss what constitutes appropriate dress for your organization. Reporting A reporting policy describes how you store any documents required by policies and procedures. Job Descriptions Define the responsibilities of each position. Smoke, Drug, Alcohol, and WeaponsFree Organizations can specify that smoking and alcohol consumption are prohibited on their premises. They can also prohibit offpremises drug use through drug testing. In addition, they can ban weapons from organization property.

Cell Phone Cell phone policies limit the use of employeeowned cell phones to businessrelated activities. Computer and Internet Computer and internet usage policies describe what activities are permitted on organizationowned assets. Social Media An organization's social media policy specifies

whether or not employees outside certain departments may refer to the organization in their social media activities. Attendance This describes the expectations for employee attendance, work hours, and unexpected absences or lateness. AntiHarassment Antiharassment policies help an organization communicate what it deems unacceptable behavior. These policies also outline the consequences when unacceptable behavior can be proven. An important part of antiharassment policy is a predefined complaint procedure. Safety Safety policies and procedures encourage behaviors that prevent or lessen the chance of accidents and injuries. Employee Evaluation It is crucial to outline the process for employee evaluations and disciplinary procedures before such actions are necessary. Diagrams and Drawings Procedures may be best explained through these tools. Records Management Describe how and where you will store records pertaining to the maintenance of the policy. Public NonDiscrimination Statement A nondiscrimination policy declares that an organization will not tolerate discriminatory treatment on the basis of race, color, sex, gender identity, religion, national origin, or sexual orientation. Governing Policies and Procedures These are created by an organization's board of directors as a framework to aid management in making decisions. Financial Financial policies describe how you procure items as well as the approval path for securing items. In order to ensure that all team members understand and follow processes, consider using a software tool that allows you to store, track, and manage the many aspects of your organization.

Smartsheet is an enterprise work management platform that is fundamentally changing the way businesses and teams work. Over 74,000 brands and millions of information workers trust Smartsheet to help them accelerate business execution and address the volume and velocity of today's collaborative work. The familiar Smartsheet interface that is designed for how people actually work leads to rapid and broad adoption across your organization. Use selfservice reports and dashboards in Smartsheet to provide realtime visibility into resources, status, and performance, so you can rapidly align operations with strategy. Discover why millions of professionals around the world use Smartsheet to move from idea to impact fast. Try Smartsheet for Free. Categories Save Time Writing Procedures Tags company policies procedures.templates sample Project management follows a common PlanDoCheckAct PDCA cycle found within the five project phases. Do you know what these phases are. Developing company policies and procedures can be a difficult task requiring expertise in writing, company politics, and an understanding of business process design. Each subject you research will also require interpreting laws, regulations, and standards. So what do you do if you are not skilled in these areas. Writing Company Policies and Procedures If you have not done this before then the question you may face is how do you start writing policies and procedures. What do you do first. Company procedures help us deploy company policies in line with regulations and standards. Experience will teach you that writing about company policy is about more than just words. Procedures must communicate actions, they must communicate standards for repeatability, and they must do it quickly. This takes time to research the facts, determine how to communicate it clearly, and not waste the reader's time. Sample company policies and procedures save time.

You can download 19 free free policies and procedures for you to use to draft your own company manuals. Company Policy and Politics Every company is a political organization. So crafting your company policy is important to convey the right message and encourage the right behavior. This is done by focusing your company policy on the reader. Be clear about what the company must accomplish. Bizmanualz provides hundreds of policy examples for many company departments so you don't have to start from zero. Business Process Design Flow charts, process maps, and business diagrams are a few of the ways to design your business processes. Outlines are used to write papers or books just as a process design is used to start writing Policies, Procedures and Processes. Business process design is the most important step to resolving confusion, communicating your process scope, and ensuring your written procedures cover your intended process. 19 Free Sample Company Policies and Procedures Templates Developing company policies and procedures does not have to be a difficult task requiring expertise in subjects that you are not as skilled at or you don't

have time for writing, company politics, or an understanding of business process design. Now you can save yourself the time it takes to research laws, regulations, and standards. Download 19 free policies and procedures as a guide to save yourself valuable time, trouble and the stress of writing your own procedure manuals. More Articles from Bizmanualz. Why Have Procedures. What Business Policies Does Every Company Need. How to Write Company Policies and Procedures Do Company Policies Exist If They're Not Documented. How to Guide to Writing Policies and Procedures Templates What Sample Policies Procedures are Available. What are SOX Accounting Policies and Procedures. Policies and Procedures Questions Answered Why Use Policies and Procedures Manuals. How Do You Write Policies and Procedures.

Share Leave a Reply Cancel reply Your email address will not be published. What Systems Does a Business Need. Add a few personal touches and you're good to go. Get clear, concise, uptodate advice with our practical, stepbystep guides. Get clear explanations of the most common HR terms. What's in, what's out, and what's around the corner—they've got the HR world covered. Learn more about the features available and how they make each recruiting task easier. Ask questions, find answers, get tips, and dig deeper into our product. Possibly not. Important Definitely. When a company's growing, the guidance it needs to provide employees grows too. Deliver rich, wellresearched company policies fast, with minimal fuss, using our library of model templates. Or talk to us about your hiring plans and discover how Workable can help you find and hire great people. Most companies use Microsoft Office, Active Directory and Outlook so we've put together a handy policy and procedure Word template for your use. When you're ready to take your policy management system to the next level, we can seamlessly migrate your documents to our Policy Management Software, keeping them in their existing formats, because our software is built on Microsoft SharePoint. Often businesses have issues discerning which is which or use the terms interchangeably, resulting in them lacking one of the elements. Sure, there may be quite a few unwritten rules that employees seem to be aware of and your organization just hasn't gotten around to putting on paper yet, but those rules tend to cause more confusion than not. Building employee engagement and retention starts from their first day at the office, when you introduce them to your company's culture through sharing the company's policies and procedures. A company's policies give employees an immediate sense of what the company stands for — its values, business ethics and personality.

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