

Policy/Procedure Development, Review, and Maintenance

PURPOSE

Policies and procedures are developed to provide guidance to individuals who carry out the work of the organization; ensure activities and operations are compliant with local, state, and federal regulations and laws governing operations; and serve to support the mission of Best Ever Family Planning. A system for developing and maintaining policy and procedure documents, manuals, and corresponding materials, is part of risk and quality management for the organization. This policy provides guidance and action steps for developing, reviewing, and maintaining these documents.

POLICY STATEMENT

It is the policy of Best Ever Family Planning that all policies and procedures are developed and maintained in uniform manner to ensure information is current, accurate, relevant, understandable, and accessible.

Policy/Procedure Development

1. The need for a new policy or revision current policy must be supported or initiated by the Department Director.
2. The draft policy or draft revision will be undertaken by the initiating Director. Director may assign staff to write, review, and edit the document.
3. The inclusion of stakeholders in drafting, revising, and reviewing of policies and procedures adds to the quality and accuracy of the final document.
4. The initial draft of the new documents or revisions in existing documents will be provided to the Administrative Assistant for tracking throughout the review process.
5. The draft or revised policy/procedure must be reviewed by the Human Resource (HR) department; a legal review may be necessary if the policy is impacted by legal or regulatory requirements.
6. After the new or revised policy/procedure has met HR and legal requirements, it must be approved by the CEO/Management Team.
7. To add approved policy/procedure to the Administrative Policy and Procedure manual, the document must be formatted and contain:
 - a. agency name
 - b. manual title
 - c. subject title
 - d. appropriate tracking number
 - e. effective date
 - f. date of last review
 - g. date of next scheduled review
 - h. purpose/rationale for the document
 - i. policy includes policy statement and action steps

- j. procedure includes step-by-step instructions, list of supplies, and tools needed
 - k. page numbers
8. Keep language brief, clear, and concise
 9. Add definitions as needed
 10. Table of contents revised as needed

Policy/Procedure Maintenance

1. Each policy/procedure is reviewed every two (2) years, except those policies which must be reviewed on a more frequent basis due to legal, accreditation, or grant requirements.
2. Each review must include: table of contents, corresponding reference materials, forms, brochures, screen shots, etc., to ensure the most accurate and up to date information is included.
3. A policy/procedure may be reviewed and edited outside of its ordinary schedule in response to a substantial change in law impacting that policy, or a substantial change in circumstances compelling a change to occur prior to the next review date.
4. A policy review schedule will be maintained by the Administrative Assistant.
5. Each review will be initiated by the Administrative Assistant.
6. Each policy will be reviewed, approved, and if appropriate, edited by the HR department, legal, other stakeholders, and directors as appropriate.
7. A description of key changes made to each policy/procedure will be documented and distributed to users at the time of implementation (See Policy/Procedure 50.2 Training/Implementation Guidelines for Policy/Procedure Changes). *NOTE: link to referenced Policy/Procedure 50.2 should be added here for ease of user access.*
8. All reviews and edits will be recorded and tracked in XXX (indicate file/document location)
9. Final authority for the Administrative Policy and Procedure manual rests with the CEO. *NOTE: could also be another position.*
10. All updated and approved policies will be posted in a non-editable PDF format XXX (indicate centralized location).
11. All retired and revised policies will be archived at time of distribution (See Policy/Procedure: 50.3 Archiving Policies and Procedures) *NOTE: link to referenced policy/procedure 50.3 should be added here for ease of user access.*

Initiation of Review and Timeline

1. Each policy will be reviewed, approved, and edited by the HR department, legal, and other department directors as appropriate.
2. All reviews and edits will be recorded and tracked by the Administrative Assistant.

Action Steps

1. The Administrative Assistant will make any initial grammatical or organizational changes to each document. (e.g., departments, titles, etc.) and provide an editable word document to the Department Director. This allows all changes to be tracked.
2. The Department Director will identify both a primary and secondary reviewer for each document (this may include the director, managers, and other stakeholders as appropriate).
3. The primary reviewer will be given fifteen (15) days to review the document and return any notes or edits to the Administrative Assistant.

4. The Administrative Assistant will then provide the document to the secondary reviewer within seven (7) days.
5. The secondary reviewer will be given fifteen (15) days to review the document and return any notes or edits to the Administrative Assistant.
6. If no notes or edits are provided by a reviewer within the fifteen (15) day review period, it will be assumed that no changes are required by that reviewer.
7. The policy/procedure is then reviewed by the HR Director who will provide any notes or edits to the Administrative Assistant within fifteen (15) days. This step is not necessary if HR director is a primary or secondary reviewer of the document.
8. The Administrative Assistant will incorporate all changes in the document and provide revised document to initiating Department Director for presentation of all reviews and edits to the CEO/Management Team for final approval.
9. Final authority for the Administrative Policy and Procedure manual rests with the CEO. *NOTE: could also be another position designated.*

Definitions

Final authority: Individual who authorizes implementation and use of the policies and/or procedures throughout the organization.

Policy: definite course or method of action selected from among alternatives and in light of given conditions to guide and determine present and future decisions

Procedure: A fixed, step-by-step sequence of activities or course of action (with definite start and end points) that must be followed in the same order to correctly perform a task.

References

"Policy." Merriam-Webster.com. Merriam-Webster, n. W. (n.d.).

"Procedure."
<http://www.businessdictionary.com/definition/procedure.html> . (2018, February 26).

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www.nationalfamilyplanning.org/pages/issues/issues---providing-high-quality-services---health-center-operations

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