## Create a Policy Manual

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Creating an association policy manual does not have to be an overwhelming task for the staff. If no record of policies exists try this method for creating the manual.

Policies originate from motions of the board. Over 10 or 20 years, it is overwhelming to try to recall why the organization acts in certain ways. By translating motions into policies, you have an organized method of archiving and recall. It can be updated or sunset periodically. It is an ideal leadership and staff training resource.

Don’t confuse policies with procedures. Policies result from board motions and are found in the minutes. Procedures are operational, usually apply to staff. Generally, the creation of a policy may result in several procedures to carry it out.

**Getting Started**

Determine the major categories in which to segment your policies. Categories might include finances, board of directors, meetings, membership, etc. Refer to the more inclusive listing below.

Make copies of the meeting minutes for the past five years and bind them. Find a volunteer (often a retired past officer with good recall, or the current elected secretary) who is willing to read the minutes.

Search for motions that translate into policy. For instance, “A motion was passed to distribute the financial reports on a monthly basis,” would be a policy. A motion referring to the site of the next annual meeting, for example, would not be a policy.

Use a highlighter and a pen. Highlight every motion that reads as a policy. In the margin, indicate what category the policy fits within.

Give the binder of minutes to a typist and explain that only the highlighted phrases are to be typed, and then organized (cut and paste) by the categories indicated in the margins. Have the document returned for final editing by the association CEO or executive officers, rephrasing policies that are unclear, eliminating outdated or redundant policies.

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Note: Bob Harris, CAE, specializes in strategic planning based on capacity, board development and staff training. Bob@rchcae.com or 850/570-6000.