

Writing Policy Without Worry

Why is policy important

- Makes rules known to all staff and patrons
- Address points of conflict
- Uniform way of doing things
- Ensure employee accountability
- Empower employees to make decisions
- Avoid unnecessary mistakes and misunderstanding
- Ensure fair decision making
- Provides legal protection*

What are some policy pitfalls

- Reduces innovation and may hinder necessary change
- May be open to interpretation if not written correctly
- Can be overly restrictive
- Needs to be updated regularly

Steps to creating policy

1. Identify your goals/need
 - a. Know why you need a policy
 - b. Understand your mission and write your policy with that in mind
2. Gather content
 - a. Do some research
 - b. Find examples of similar policies
 - c. Brainstorm and get input from other stakeholders
 - d. Create an outline of everything you think you need in the policy
3. Write the policy
 - a. Style
 - i. Have a standardized format. A policy template will help to get things started.
 - ii. Write to the most basic audience understanding.
 - iii. Break text into scannable chunks. Use section headers and white space between paragraphs.

- iv. Define terms when necessary. If there is anything that a layperson might not understand or if there is a term that has multiple meanings/interpretations, provide a definition at the beginning of the policy.
 - v. Omit excess words. Example: use 'to' instead of 'in order to'
 - vi. Use "must" to indicate requirements rather than "shall." The use of "shall" is imprecise and can indicate either an obligation or prediction. Instead of using "shall," use:
 - 1. "must" for an obligation,
 - 2. "Must not" for a prohibition,
 - 3. "may" for a discretionary action, and
 - 4. "should" for a recommendation.
 - vii. Minimize abbreviations. If you have to use them, define them the first time you use them.
 - viii. Avoid sentences with multiple clauses. Run-on and complicated sentences can lead to misinterpretation.
 - ix. Use simple and direct language avoiding jargon and qualifiers
- b. Substance
- i. Make it relevant. If a policy doesn't need to exist, don't make it.
 - ii. Keep it simple. In most cases, less is more. Write what you need to communicate the policy and leave out the fluff.
 - iii. Keep it general. Don't include specific procedures or processes.
 - iv. Make sure it is enforceable. A policy that can't be enforced is useless.
4. Edit and review
- a. Consult stakeholders before final approval to ensure that the policy works in practice.
 - b. When to get legal advice
 - i. Ensure compliance with legal requirements
 - ii. Avoid discrimination or other legal issues
 - iii. Personnel policies
 - c. Make sure it aligns with procedures. Create new procedures if needed.
5. Implement
- a. Get approval from your Board. Official library policies always need to be Board approved. Anything else is just a guideline.
 - b. Have a training plan if new procedures are needed
 - c. Give the employee tools to implement the policy
 - i. Talking points to explain the policy to patrons
 - d. Store in a common place where it can be accessed easily

6. Update

- a. Review on a schedule
- b. Make changes whenever they are needed
- c. Make your policies future proof
 - i. Don't include anything that will become dated quickly
 - ii. Don't include information that is likely to change (staff names)
 - iii. Don't include the same information that is in other policies (refer to policy instead)

Notes on equality and fairness

- Policies must be written using gender-neutral and gender-sensitive language.
 - Do not use masculine or feminine pronouns as the default; use "they" or "the individual."
 - Avoid using gendered-nouns such as chairman, man, mankind. Instead, use gender-neutral nouns such as chair, department head, coordinator, humanity, individual, or person.
- Never make policy for a specific group
- Consider how the policy might create barriers - will it have a disparate impact on any group
- Don't make policies totally restrictive. Think about why you are restricting things and if that is really necessary.