



MAKING REMARKABLE BONUS CHAPTER: POLICIES AND PROCEDURES

What is it?	Policies and procedures provide structure and rigor behind the operations of an organization.
Why is it important?	It creates consistency, equity, and protection for leadership in the execution of their duties.
Where do you start?	<ul style="list-style-type: none">• Assess the state of organizational policies and procedures.• Bring in assistance, or use high-quality samples and templates, to update.
Remarkable is:	<ul style="list-style-type: none">• Modern, contemporary and up-to-date policies and procedures that enable people in their work

“I am boring. I’m fine with boring.” Anderson Cooper

There is no way around it. This policy stuff is boring, but it’s necessary.

When I arrived at the Calgary Chamber, the policies, procedures and contracts situation was a nightmare. Not a single consistent employment contract existed. Staff policies had not been updated in a decade. There was no rhyme or reason as to why we were using certain providers and we were being ripped off by many of them. To save money, protect the organization, and somehow manage to move into the realm of a generally sophisticated organization, I updated virtually all our policies, contracts and templates.

Policies and procedures should include things like code of conduct, digital, HR (particularly harassment), privacy and confidentiality, alcohol (and marijuana if in a jurisdiction where it is legalized), transportation, purchasing and others.



There is nothing magical about policy updates. It's just a matter of time and rigor. This is going to be a short chapter simply because improving your organization's policy and procedure situation is about answering a host of questions and following a few steps.

QUESTIONS

1. Do you have a standardized employment contract? Standardized services contract?
2. Do you have a standardized set of employment agreements (e.g., overtime, holiday, etc.)?
3. Do you have an up-to-date employee policy and handbook (i.e., updated within the last 18-24 months)?
4. Do you have an up-to-date operations policy and handbook (i.e., updated within the last 18-24 months)?
5. Do you have an up-to-date new employee orientation guide?
6. Are your non-board policies and procedures (e.g., risk, signing authorities, privacy and confidentiality) up-to-date?

Your answers may reveal that your current state is far from remarkable. You'll need to get some help to bring your policies and procedures up to a remarkable level.

STEPS

1. Hire legal counsel or an HR advisor to update your employment contract, employment policies, new employee orientation guide and any other HR matters. Use templates from trusted sources for non-legal type policies and procedures.
2. Hire legal counsel to update services agreements.



3. Hire legal counsel or a consultant to update your non-board policies.
4. Work with your accountant to update any non-board financial policies (e.g., spending authorities, document retention, etc.).
5. Negotiate improvements in your pricing with your preferred suppliers or go back out to tender for larger expenditure items.

If you cannot afford to hire someone, many professional or industry associations have sample libraries that you can access and adapt to fit your organization or reach out to a few trusted peers for theirs as samples. Make sure they are relevant, applicable to your situation, and are current and recent.

RESOURCE KIT

ASK THIS – BONUS DIAGNOSTIC

1. Policies and Procedures
 - a. Do you have a standardized employment contract?
 - b. Do you have a standardized services contract and preferred rates for your key vendors?
 - c. Do you have a standardized set of employment agreements, such as overtime, holiday etc.?
 - d. Do you have an up-to-date employee policy, handbook and orientation guide (i.e., updated within the last 12-18 months)?
 - e. Are your non-board and non-employment policies and procedures up-to-date (i.e., spending, purchasing, digital, updated within the last 12-18 months)?

DO THIS TO BE REMARKABLE

- Stay current and contemporary
 - Update your old and inconsistent policies and procedures. It's pretty simple: make an assessment and then update as needed.

REVIEW THIS

- OTHER
 - Sample libraries of your association, such as ASAE, CSAE, ACCE etc.



- Bulletins and updates provided by law firms as to recently amended law that will affect employers and operations.

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