POLICY ASSIGNMENT GUIDELINES – OVERVIEW

Below is a quick overview to help you not only start but also complete any policy assignment.

I.	**Key Policy Information: Compile some basic information around the policy assignment by finding answers to the following questions.**

- What is the purpose of the policy – that is, what issue, risk and/or law or regulation do you need to address?
- Who is the audience of the policy – who is subject to the policy?
- What key issues need to be addressed in the policy – what rules or minimum requirements need to be included in the policy?
- What other policy documents currently exists on this issue (either on point or related)?
- Do you need to deliver any training on the policy to help raise or reinforce awareness on the policy?
- Who needs to be involved in reviewing, owning, approving, and communicating/delivering training on your policy?

II.	**Key Resources: Factor in the tools and resources available to assist such as the items noted below.**

- Check to see what policy templates are in place to make sure you use the right format for your document.
- If your organization has a Policy Style Guide, make sure to review it in advance to help you organize the document properly and use a tone that will make it easy to follow.
- If you have a central policy group or a policy administrator, schedule time with the group or individual to go over to help factor in any missing steps or resources that you need to consider.
- If you have a project manager or group available to assist, collaborate with them on how to carry out your assignment. Even if one is not available the considerations below may be used to outline your key measures.

III.	**Key Measures: Prepare a plan by setting or using your target date and working backwards to complete key measures.**

Prepare a plan and make sure to consider your firm's policy management process that may include:
- Draft Policy
- Review and Revise Policy
- Present Policy for Approval
- Communicate and Educate Audience on the Policy
Note: If you need to factor measures in for maintaining or implementing the policy, make sure to include these as well.

Having the information is critical before you draft your policy. This along with a plan will ensure your success by helping you to manage assignment effectively and efficiently. Not only will it guide you through the policy management process for your current assignment but also help with future assignments.