GUIDE TO
ORGANIZATIONAL
POLICY
DEVELOPMENT:

A PEOPLE-CENTERED APPROACH TO HUMAN CAPITAL POLICIES

WRITING AND PUBLISHING YOUR ORGANIZATION'S POLICIES:
Process Overview, Checklist, and Resources

The policies and practices your school or organization has in place can significantly impact the employee experience, particularly with regard to equity and inclusion. Thoughtful, well-crafted policies help to ensure that people in your organization are treated fairly and respectfully in a variety of situations, and the absence of these policies can lead to unintentional inequities and employee dissatisfaction. Read on to learn more about how to begin the process of codifying the information your employees need to know—and how it can protect you as their employer.

WHO ARE THESE RESOURCES FOR?

Creating or revising an employee handbook or policy manual can seem like a daunting task. We are here to help! The resources below may be for you if you are a school/organization that:

- Needs an employee handbook or policy manual but does not know where to start
- Has some policies in place, but knows there are holes and/or pain points
- Has established policies but needs a better process for reviewing and revising them ongoing
- Wants to gather the perspectives of your employees to help improve your policies
- Wants your policies to reflect your commitment to Diversity, Equity, Inclusion, and Antiracism (DEIA)

A QUICK GUIDE TO NAVIGATING THE RESOURCES IN THIS DOCUMENT

Writing a policy manual for the first time? **Want to conduct an audit of your current handbook?**	Jump to **Page 2** for a process overview and checklist, and then visit our supplemental resource **Foundational Policies and Processes List**
Need to revise some existing policies? **Want to look at them through a DEI and Antiracist lens?** **Drafting a new policy to respond to a specific need?**	Jump to **Page 3** of this dcoument to review our checklist for individual policies. We also have a more detailed **Policy Review Matrix**, as well as two sample policies **here** and **here**.
Want to be sure you've taken all of the right actions before you roll out your handbook or policy manual to employees?	**Page 4 and 5** of this document include final checklists and important notes on things to keep in mind throughout the process, as well as additional resources to check out.

THREE MAJOR STEPS TO DEVELOPING YOUR HANDBOOK/POLICY MANUAL:

At a high level, the process of developing your handbook/manual encompasses three major steps:

① **Determining the contents**

② **Researching, writing, and reviewing individual policies**

③ **Conducting final checks**

Resources and checklists related to each of these steps can be found below.

STEP 1: Determine the contents

This step is critical if this is your first time creating a manual/handbook, though it should also be revisited on an annual basis, or when you revise your handbook, whichever is more frequent.

DETERMINE THE CONTENTS: A CHECKLIST
Key Question: *Is there a clear plan to document important information that employees need to know?*

| Have you … | ☐ Considered your Employee Value Proposition (EVP) and determined the extent to which your current policies are reflecting the employer you aspire to be?
☐ Conducted an audit on current, common practices across your organization so that you can codify those additional practices in writing?
☐ Considered what additional policies need to be in place to ensure that your organization is Diverse, Equitable, Inclusive, and Antiracist?
☐ Identified any other pain points your organization is currently experiencing and could be remedied through a well-documented process or policy?
☐ Spoken with stakeholders at various levels of your organization to communicate your policy/handbook objectives and to understand their needs and desires in these areas?
☐ Researched federal, state, and local policy to determine any policies that are applicable to your organization and need to be shared with employees (e.g. FMLA)? *Note: If your organization operates in multiple states, it is possible that you may need to create state-specific handbooks to be in accordance with local law.*
☐ Consulted legal advice and your insurance providers to ensure nothing is missing?
☐ Compiled a full list of policies needed and assigned a subject-matter expert or member of your Talent/HR team to research, compose, and revise each applicable policy? |

WHAT ADDITIONAL RESOURCES ARE AVAILABLE TO HELP ME DETERMINE THE CONTENTS?

For further support in identifying the policies and processes your organization should document, as well as DEI and Antiracist considerations, check out: **Foundational Policies and Processes List**

STEP 2: Research, write, and revise individual policies

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When you have determined the contents and are ready to write new policies and/or revisit existing ones, the checklist and resources below will help.

RESEARCH, WRITE, AND REVISE INDIVIDUAL POLICIES: A CHECKLIST	
Component and Key Question	**Key Actions: Have you...**
Clarity: *Are the steps, processes, and terminology clear?*	☐ Ensured the steps, processes, or provisions in the policy are entirely clear, and don't need further verbal explanation? ☐ Included visuals to help clarify the policy? ☐ Accounted for any possible holes in the process or variations in the provisions? ☐ Clarified all terminology, acronyms, or jargon with definitions, as necessary?
Scope: *Who does the policy apply to and in what circumstances?*	☐ Stated who the policy does and does not pertain to? ☐ Named the policy/policies that covers other employees, if necessary? ☐ Thought through any exceptions to this policy, and named them, where applicable? ☐ Considered what process would be used to grant exceptions?
Alignment: *Is the policy connected to a greater purpose, including the organizational values and culture?*	☐ Included language in the policy that reflects your organizational values? ☐ Built the policy to uphold/contribute to a positive work culture? ☐ Named the purpose/benefit of this policy?
Antiracist: *Does this policy promote increased power and well-being of people of color within the organization?*	☐ Specifically considered how this policy will impact people of color within your organization, and sought to make that impact positive? ☐ Ensured no language is present that could be pejorative to people of color (e.g. the "achievement" gap)? ☐ Included people of color in the creation or review of this policy? ☐ Acknowledged any tension between Antiracism and other organizational needs/preferences (e.g. timeframe, budget)?
Diversity, Equity and Inclusion: *Does this policy contribute to a more diverse, equitable and inclusive workplace for employees?*	☐ Included your organizational commitment to Diversity, Equity and Inclusion? ☐ Affirmed each employee's value through this policy? ☐ Added equity checks into the process for this policy? ☐ Included a diverse set of stakeholders, including people from historically marginalized groups, in the creation or review of this policy?
Review: *Has this policy gone through the proper reviews within the appropriate timeframe?*	☐ Recently reviewed your policy against your current organizational goals/needs? ☐ Recently had legal counsel review this policy to ensure that the policy reflects most current statutes? ☐ Conducted internal and external research to inform this policy?

WHAT ADDITIONAL RESOURCES ARE AVAILABLE TO HELP ME WITH INDIVIDUAL POLICIES?

- Use our **Policy Review Matrix** to help you assess the strength of each of your policies.
- Review sample policies with annotations to see how this plays out in action:
  - **Sample Policy 1**
  - **Sample Policy 2**

STEP 3: Conduct final checks

After all of your policies have been written and reviewed, the following checklist will help you ensure you have conducted all of the final checks necessary.

CONDUCT FINAL CHECKS: A CHECKLIST	
Component	**Key Actions: Have you...**
Comprehensiveness	☐ Included all of the policies you set out to? ☐ Included your mission statement, history of your organization, and the purpose of the employee handbook? ☐ Included a table of contents and/or index so that employees can easily locate information?
Consistency	☐ Had a single author/editor review the entire handbook to ensure consistency of voice/tone? ☐ Utilized consistent formatting throughout (e.g. font size and type, headers and subheaders, colors for graphs/charts)?
Accessibility	☐ Distributed the handbook to all employees yearly and to each new employee who has joined the organization since distribution? ☐ Translated the handbook into other languages, as necessary/appropriate? ☐ Notified employees if any policies have changed? ☐ Made printed copies available for employees, as requested? ☐ Instructed employees how to confirm receipt of the handbook and tracked that each employee has done so?
Evaluation	☐ Ensured managers are aware of their role in implementing policies and determined a system for ensuring implementation with fidelity? ☐ Considered how you will monitor the impact of your policies on your employees? ☐ Created forums for employees to provide feedback, as necessary?

STAKEHOLDER ENGAGEMENT IN THE FINAL CHECKS PHASE

If your new policies will significantly alter employee compensation or benefits, the way they spend their time at work, or the workplace culture, you may need to invest more time in stakeholder engagement and change management at this stage. For example:

- If you engaged employees during the policy writing and revision process, you may want to return to them to let them know where you landed before you release the policies/handbook to the entire organization.
- You may elect to train managers on the changes and have them roll them out to their individual teams with a personalized presentation.
- When you distribute your employee handbook, you may include a brief memo to accompany it, outlining what is changing and the likely impact on employees. This could also be done via a recorded message or optional meeting.

NOTES ON DIVERSITY, EQUITY, INCLUSION, AND ANTIRACISM

Per the Civil Rights Act, your organization should not take actions that result in any group having advantages in the workplace. However, a long history of discriminatory policies and practices in our country has resulted in many groups - people of color, women, LGBTQ, and people with disabilities among them - having diminished power at work. As such, we recommend that your policies endeavor to right this balance, with the goal of equity for all people in your workplace.

As your organization seeks to make your policies antiracist, equitable, and inclusive for your employees, there may be inherent challenges to gathering diverse perspectives. Where possible, it is important to seek the perspectives of your employees who represent historically marginalized groups, and it is also important that these employees do not feel that the weight of getting this policy right is on them - nor should anyone feel compelled to engage in this process simply because of their demographics, sexual orientation, etc. If your organization employs only a small number of people who represent specific historically marginalized groups, seeking input from outside your organization can be another valuable exercise to ensure that you are accounting for diverse perspectives.

NOTES ON LEGAL REVIEW

There are many federal laws designed to protect both the employee and the employer. States – and sometimes even cities - also have a broad range of power to develop statutes that impact the workplace. For this reason, we believe it is a critical step to seek legal advice when developing your policies/handbook, ideally from a local attorney who is well-versed in the city, state, and federal laws that should be considered. For new or young organizations, we recognize this may present a financial challenge. If that is the case for you or your organization, we suggest reaching out to your board members and/or other community advocates who may be able to support you in securing pro bono time with a lawyer.

HELPFUL RESOURCES AND FURTHER READING

BenefitsPRO
Berkely Haas Center for Equity, Gender, and Leadership
Boston University Center for Antiracist Research
The Education Trust – New York: The Educator Diversity Playbook
Equal Rights Advocates
Harvard Business Review
The Management Center
SHRM
Time's Up Foundation

EdFuel provides dedicated support in each of the areas listed in this document; please reach out to us at info@edfuel.org if you are interested in discussing a customized engagement with a member of our team.

ABOUT EDFUEL

EdFuel is a mission-driven, national non-profit that empowers education organizations to effectively recruit and retain a diverse and high-quality staff through comprehensive and equitable talent management systems. EdFuel supports single-site schools, charter networks, traditional districts, and education nonprofits across the country with talent management needs of all types.

- We help design inclusive, equitable, and anti-racist talent systems that education organizations need to recruit and retain the best people. Our services range from full scale system design and implementation to individual sessions for schools, districts, and nonprofits.

- We believe that standing shoulder-to-shoulder with leaders throughout the work ensures the organization can sustain robust talent practices long after we're gone. We instill a capacity-building, rather than coaching or consulting, approach in our work through structures such as:
    - Scaffolded release of work to the client
    - Rapid draft iteration, rather than "end-state" product delivery
    - Intentional coaching sessions built into our weekly check-ins with clients

EDFUEL'S APPROACH: THE TALENT MANAGEMENT LIFECYCLE

EdFuel provides support across all Talent and HR domains.

THE TALENT LIFE CYCLE

We believe that equitable, inclusive, and antiracist talent systems create the conditions for all staff (and therefore students) to thrive.

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ORG-WIDE TALENT STRATEGY & STAFFING MODELS

DIVERSITY, EQUITY, INCLUSION, & ANTIRACIST PRACTICES

TALENT DIAGNOSTIC & EQUITY AUDITS

COMPETENCY MODELS

COMPENSATION & BENEFITS

RECRUITMENT

HIRING

ONBOARDING & OFFBOARDING

TALENT DEVELOPMENT & COACHING

PERFORMANCE EVALUATION

SUCCESSION PLANNING

RETENTION

About the Authors

SARA-KATE ROBERTS, DIRECTOR
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Sara-Kate Roberts joined EdFuel in February 2020 after serving as an independent consultant whose work primarily focused on strengthening the human capital strategies that educational organizations utilize to build, maintain, and grow their teams. Her consulting projects spanned partners that include charter schools and networks, institutions of higher education, and nonprofits.

Prior to consulting, Sara-Kate oversaw strategic talent initiatives at KIPP New Orleans Schools and before that, helped to lead the roll-out of teacher evaluation in Jefferson Parish Public Schools, the largest district in the state of Louisiana. She previously worked at Teach For America in the San Francisco Bay Area, after teaching English and Leadership at Skyline High School in Oakland. More than fifteen years after meeting her first students, they are still the driving force behind her work, and continuously propel her desire to build strong teams that will help students succeed.

Sara-Kate graduated from the University of Alabama and lives in Atlanta with her husband, daughter Eliza, and dog, Corduroy.

MARY MASON BOAZ, PARTNER
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Mary-Mason joined EdFuel in June 2015 because she believes that students deserve the most talented, focused leaders working with them toward their educational outcomes.

During her tenure at EdFuel Mary-Mason has led key programs including the Executive Coaching cadre and Peer Learning Communities, developed a number of open-source tools, and launched EdFuel's work in Detroit. As a Partner she oversees our internal talent systems and works deeply with our partners to solve their most pressing talent needs.

Prior to her work at EdFuel, Mary-Mason co-led the Teacher Leadership Development team at Teach For America – D.C. Region, leading the training and development of 6 instructional coaches and approximately 250 teachers. Before taking on that role, she served as an instructional coach, managing over 100 teachers and working with school leaders across D.C., Prince George's County, and Charlotte Mecklenburg Schools. Mary-Mason has also served as a School Director for Teach For America's Tulsa Institute, leading a summer school program for over 500 students and managing the development of 100 first year teachers and 10 teacher coaches. Mary-Mason began her career as a 7th and 8th grade Social Studies teacher at McClintock Middle School in Charlotte, North Carolina.

Mary-Mason graduated from James Madison University with a Bachelor of Arts in French and International Affairs. She currently lives in Lexington, Virginia with her husband, Matt, and their daughters, Nan and Mary Fraser. She is passionate about racial justice advocacy, loves exploring the city, watching Bravo TV shows, and spending time with her family.

AND A SPECIAL THANK YOU TO THE FOLLOWING CONTRIBUTORS:

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