How to Write a Policy Manual

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Chapter 1: Why Develop a Policy Manual?

Policy manuals are developed to help staff and management teams run the organization. In best use situations, policies play a strategic role in an organization. They are developed in light of the mission and objectives of the company and they become the media by which management's plans, rules, intents, and business processes become documented and communicated to all staff.

Carefully drafted and standardized policies and procedures save the company countless hours of management time. The consistent use and interpretation of such policies, in an evenhanded and fair manner, reduces management's concern about legal issues becoming legal problems. There is more about the legal aspects of policy later in this section.

Policy manuals and their close relative the employee handbook should be an important part of the operation. They should be the first thing given to a new employee (either in hard copy of an electronic version). [1]They should also be easily accessible in their most up-to-date version. Hence it is extremely important that an organization's policies be a "living document" prepared and saved in Microsoft Word and easily exported into portable versions (like PDF) and made available over the company network.

Consider the benefits of written policies; a set of written guidelines for human resource decisions. Better yet, think about the benefits of the process of developing policies. The process your company management team undergoes when comparing the policy alternatives, understanding their importance, and evaluating your company's current practices will help you to develop your company's guidelines and procedures that will make your organization a better run entity.

Consider the benefits of better communication within your organization. A policy manual is a means of communication with employees; it is first a way to communicate to employees the management rules and guidelines of the organization. Employees want and need that type of guidance in black and white. In addition, policies help to organize and announce management's plans for growth, and they communicate the company's investment in its employees by explaining employee benefits and workplace issues.

[1] OfficeReady Policy Manual has a PDF conversion capability. This means that you can easily convert your policy manual or employee handbook into a PDF document for electronic distribution via e-mail or web site downloads. PDF (Portable Document Format) was created by Adobe as a standard way to view documents regardless of what software or hardware platform the reader is working with. PDF has quickly become an Internet default - documents on web pages are often uploaded as PDF documents, which can be viewed from the browser window, using free Adobe Acrobat technology (Acrobat Reader).

As a company's policies are developed they become a framework for consistency and fairness. Polices define management's standards for making decisions on various personnel and organizational issues. Clearly defined procedures and standards, spawned from polices that are well thought out, express the company's intent to make consistent and evenhanded decisions.

Not enough can be said about the value that comes from policy creation. It is true that policy can help an organization run at its most efficient and effective level. That alone may bring value through cost savings and additional revenue. However, if done correctly, policies can bring more value by accurately reflecting the company's philosophy of business and employee relations as they demonstrate your creativity in solving policy issues, the competitive position of the company in providing a variety of employee benefits, and respect and appreciation for human resource management. This type of message can go a long way towards promoting staff loyalty and everyone knows that staff longevity is a valuable asset.

There is also a legal aspect of policies. They are a means to protect the legal interests of a company. The company's policies and procedures in many ways define the rights and obligations of the employee and the company. The policy manual is an expression of the rules governing the employment relationship. Today, more than ever, a company must protect its rights within that relationship by adopting policies that are fair to both sides, clearly stated, and legally permissible.

With regards to the legal aspects of policy creation there is one important caution. If your company's employees are represented by a labor union, any collective bargaining agreement (CBA) between you and the union will, in effect, serve as a policy manual with respect to employee issues covered by the CBA.

In this case, you may utilize a policy manual that covers non-union employees. A CBA may also limit your ability to modify your policy manual at will, requiring instead negotiation of matters covered by the CBA.

What is a Policy?

Writing policies that are effective, enforceable, and accepted by management and employees is difficult. To develop good policies that enhance rather than hinder the chances of achieving organizational objectives, it helps to understand exactly what a policy is and how it relates to such concepts as mission, objectives and procedures.

A policy is a predetermined course of action established as a guide toward accepted objectives and strategies of the organization. Consider this excerpt from a policy development book:

A vision is formulated, business processes are analyzed, and policy and procedure systems to support the vision are born. As policies and procedures are written, approved, published, and implemented, the company's vision is articulated. [2]

A first step in writing policies is agreeing on what a policy is and how it differs from a procedure. The two terms are often used interchangeably, but they are a bit different. Simply stated, a policy lays out what management wants employees to do, and a procedure describes how it should be done.[3] Procedures describe exactly how to carry out the policy and contain much more detail.

The Connection between Mission and Policy

Without policies boundaries and baselines related to the company's missions and objectives would not exist. When developing your policies, you should start with your mission and objectives. A mission statement should be a clear statement about who your company is trying to serve. It should be a cultural reflection of the values, beliefs, and philosophy of the organization.[4] It should be very brief and very clear so that everyone in the organization can understand it and so that objectives are seen clearly as steps to achieving the mission.

Here's the mission statement for Southwest Airlines:

Southwest Airlines Company is the nation's low-fare, high customer satisfaction airline. We primarily serve short-haul city pairs, providing single-class air transportation, which targets the business commuter as well as leisure travelers.

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[2] Page, Stephen, B., p. 2. Establishing a System of Policies and Procedures, Process Improvement Publishing, 2002.
[3] McQuate, Craig , Penning Effective Policies, Security Management, Dec 2002.
[4] Statement of Management Accountants 4DD, Tools and Techniques for Implementing Integrated Performance Management Systems. Institute of Management Accountants.

From a well written mission statement objectives can be set and from objectives, policies can be created. Just as a mission or vision for your organization is a prerequisite to policy development, so too are strategic objectives. Objectives are like goals; they direct the staff's attention to important factors in running the organization and help define unique ways to enhance performance of individuals and the organization as a whole. Therefore, objectives should reflect the critical success factors of the company. Those factors could include dimensions such as employees, customers, quality, financial performance, operation, products, and marketing. The table below may help you think about the objectives of your company along similar dimensions:

Critical Success Factors/Dimensions	Example Objectives
Employee	- Develop a highly skilled workforce - Minimize employee turnover - Annual evaluations
Customers	- Increase customer satisfaction - Minimize customer turnover (retention) - Increase customer base
Quality	- Quality the first time - Quality every time - Minimize product returns and allowances - Optimize the cost of quality
Financial performance	- Minimize product cost - Maximize profitability - Lead industry in sales per employee
Operations	- Minimize product lead time - Minimize inventory levels - Reduce non-value added activities
Products	- Market leader in new products - Reduce product development time

As diagram 2.1 shows, policies should be developed in light of the objectives set by management. If objectives are the way the mission of the company gets carried out, then the policies (and the procedures they spawn) help assure that objectives are met each and every day the organization exists. Policies will drive the development of any needed procedures.

Diagram 2.1: Mission, Objectives, Policies, and Procedures

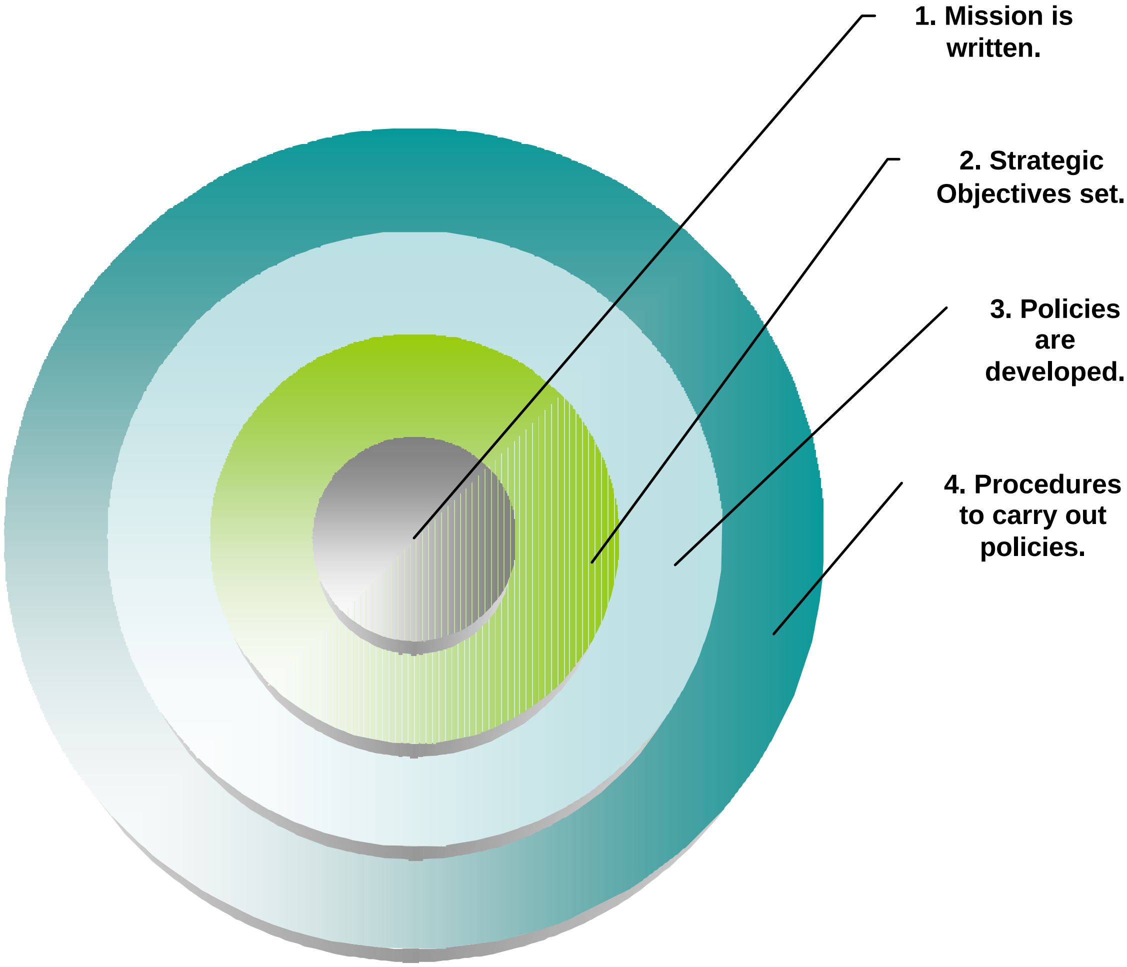

Diagram 2.1 shows that the mission is at the heart of the organization – like a bull's eye. Once a mission is in place objectives can be set and policies and procedures can be written to help assure the achievement of objectives (and in turn – the mission).

Policies Empower

Many people think of organization policies in a negative light: as a means to control employee behavior. However, there is a more positive side to policies. They can actually empower employees. It is true that many policies seem restrictive in nature and many need to be to promote good internal control however, policies also provide staff with a degree of freedom within defined boundaries. With good policies in place, staff is able to execute their duties; they are free to act within the limits set by policy; without constant managerial oversight. In that way, policies empower staff to do the right thing.

How to Start Creating Your Policy Manual

The OfficeReady Policy Manual contains three Microsoft Word templates to help you get started: the Office Policy Manual, Office Policy Manual – Brief Edition, and the e-Policy Manual. The Office Policy Manual template is the most comprehensive of the three and for most organizations in need of a policy manual, that template is most appropriate. However, if you are looking to get some fundamental general policies in writing, then the brief edition of the OfficeReady Policy manual is the place to start. If you have basic policies in place and want to supplement them with e-policies, then the OfficeReady e-Policy Manual is where to begin.

As you probably already know, the OfficeReady Policy Manual is a collection of templates and boilerplate policy text; in essence sample text that you can tailor to meet your needs. By working with these templates, you can begin the first step of policy creation – determining the content of your policy manual.

Content creation takes some research involving a great deal of information gathering. Policies initially are derived from an understanding of core business practices. They also may emanate from a need to control operations and therefore a good understanding of how the business functions is necessary as a first step in developing good polices.

Whether you are updated an old set of policies or creating new policies, be sure that a valid need exists for each policy. Ensure that the issue is not already adequately addressed elsewhere in existing policies. If the company already has a building access policy, for example, is a separate contractor access policy really needed? The answer to this question will be decided by the company culture, operational requirements, and the scope of existing policies. Perhaps a simple addition to an existing policy will fill the void.

In essence, policy creation is a form of research. Research is an ongoing aspect of keeping polices up-to-date and maintaining a comprehensive policy manual. The policy manual should be a “living document” – very much dynamic – subject to change. Existing policies need to be expanded, supplemented, and revised as business conditions change, as business process reengineering takes place, as an organization downsizes, and as quality improvement initiatives are implemented.

Getting started from scratch on a policy manual is the biggest challenge. The OfficeReady Policy Manual approach is to organize policies using the following categories:

Employment Policies

These are the policies that guide hiring practices, orientation of new employees, compliance with employment laws, and confidentiality.

Employment Status & Records

These are the policies that define such issues as employment classifications, access to personnel files and guidance on how background checks and performance reviews are to be performed.

Employee Benefits

These are policies that explain employee benefits such as insurance, vacations, holidays, leave, and employee reimbursements.

Payroll

These are policies that are related to salary and wage administration including deductions, pay advances, and time keeping.

Workplace Guidelines

These policies are quite varied and their purpose range from defining certain work arrangements such as flex time and telecommuting to offering guidelines on the use of company assets and record retention.

Employee Conduct

These policies are guidelines that control employer behavior and conduct on the job. The mainstay of this section is a code of conduct but also important are policies regarding substance abuse, smoking, harassment, and workplace violence.

E-Policies

These policies guide staff in the use of the organization's information technology. Policies defining acceptable and prohibited activities and use of e-mail and the Internet make up a majority of these policies.[5]

[5] According to Nancy Flynn author of the ePolicy Handbook (AMACOM, 2001) and managing director of the E-Policy Institute, the only effective way for a company to protect itself is by developing clearly written, comprehensive e-policies that explicitly regulate the use of software, e-mail, and the Internet.

Preview the OPM Sections as a Primer

To help you get started, think of the table of contents of the OfficeReady Policy Manual as a big checklist of what you might want to include in your policy manual. Keep in mind that you can navigate to any desired section of the Office Policy manuals by holding down the Control key (Ctrl) while clicking on the page number of the item in the table of contents. You might find that the best way to start your process of policy development is to read a few of the policies that seem appropriate to your organization. By doing so, you may find that you have additional facts to research so as to customize the policy to meet the needs and to support the goals of your core business processes.

Organization Culture and Policies

Although templates can give you a head start on policy development, other factors must be considered as you write your polices. One factor is your organization's culture. Organizational attitudes toward policies span the spectrum. On one end of the scale are companies that have a policy for everything. Banking is a lot like that. U.S. Banks are still (despite banking deregulation efforts during the 1980s) highly regulated entities and policies are needed to control all aspects of operations. At the other end of the spectrum are companies that only have only a few policies (only those required by the laws that are relevant to that company). Most companies fall somewhere in between these two extremes. The manager writing any policy needs to understand where on the spectrum the company falls and how the policy can be made to fit the organization's culture to enhance compliance.

Get Support from Staff

Enhancing compliance to policies also begins with staff participation. One lesson learned by the vast number of organizations that have gone through process reengineering is that new policies are more readily adopted and followed by the staff when the staff has had some significant role in their development. Therefore, it may make sense to distribute appropriate sections of the OfficeReady Policy manual to the staff of your organization. Present these sections as drafts and solicit feedback and then incorporate revisions into the sections and you will maximize the chance of compliance to your policy.

Employees and managers at all levels will be most likely to support a policy that makes sense, is easy to follow, and minimizes interference with getting the job done. The best way to get such a policy is to have all affected parties involved in the development process. Not allowing participation at the policy creation stage is a frequent downfall of implementation and compliance.

Support can also be enhanced if the policy's impact on the company is clearly explained; the impact that will be most meaningful to managers is the financial loss that can result from failing to implement the policy. The ideal situation is when management and staff can see how a particular policy helps promote the achievement of organizational objectives and mission.

The Role of Procedures and Forms

Many people confuse procedure with policy. A policy is a predetermined course of action established as a guide toward accepted objectives and strategies of the organization. It is at a much higher level than a procedure. Procedures are methods – they are ways of carrying out a policy. Forms may be part of a procedure; in other words, to carry out a procedure it may be necessary to complete one or more forms. For example, your organization may have a policy that every employee who is terminated or who decides to leave the organization participates in an exit interview. Procedures can be developed on how that interview should be conducted while a form or checklist can help assure and document that a particular exit interview was carried out according to policies and procedures.

OfficeReady Policy Manual has a collection of forms, checklists, and guides that may be a starting point for your organization. However, if your company already utilizes a collection of forms, you should review those forms to determine if policies need to be developed or revised. Ask why a form is used. Understand the process and the intent of the form and you may have identified the need for a policy. That last suggestion may seem like a recommendation to work backwards and in effect it is. Managers may be carrying out procedures and utilizing forms that are not linked to any documented policy. If that's the case in your company, it is now time to document it in your policy manual.

The connection of policy-to-procedure-to-form raises another important point: policy development needs to be coordinated with procedures and forms management. New policies or revisions to old policies may spawn new procedures. New procedures may require revision of old forms or the creation of new ones.

Write, Edit, Re-Write, Edit, Re-Write

Despite the fact that OfficeReady Policy Manual can help you put together a polished set of policies, the task will still be a lot of work. Put enough time and effort into preparing the manual and do your homework. A good policy manual is the result of many hours of thinking, analyzing, researching, writing and re-writing. Do not expect to write your manual on the first attempt. Even though you may have a terrific understanding of your business processes, mission, and objectives and believe you can communicate policies clearly, good writing is the result of a recursive process. You need to go through the circular process of writing, editing, and re-writing until your manual meets the needs of the staff of your organization.

Once you write the first draft, put the manual aside for awhile. Most writers find that if they give the manual a break they can come back to it with a fresh set of eyes. While re-examining the first draft, you may see flaws that you missed the first time. You may see that some rearrangement and editing is needed. After you edit and print a second draft, have someone else proofread it. Find a proofreader who understands your organization's mission and who can empathize with the needs of the staff that will refer to the policy. Then act on their recommendations. Keep at it till you are sure you have it right. You may have only one chance to make a great impression on your reader. Therefore, work hard and take the time to prepare a well-written and attractive document.

Clarity, Conciseness, and Coherence

Clear writing does not just happen. You must make it happen! When you edit polices, make changes that promote the three Cs: clarity, conciseness, and coherence. Anyone who is reading a policy manual wants it simple and straightforward. Most serious policy manual readers will want to read the document quickly. Clarity is extremely important.

Clear writing is understandable and easy to read. If your writing has clarity, your reader will immediately grasp your meaning; he or she will not have to stop and figure out your meaning. Be clear and direct. Make every word advance your meaning. Weed out unnecessary words. Delete redundancies, needless phrases, overblown phrases, and clichés. For your policy to be clear and for subsequent procedures to be exact, each and every policy that you write should contain accurate and complete information expressed concisely.

Coherence is about good logic, linking sentences, and discernable threads of thought. Coherent writing will lead the reader through your policy manual. It lets you give a guided tour of your policy model.

Policy manual readers look for coherent thought and logic. You should evaluate coherence in your manual. Look at your sentences and how they make up your paragraphs. Do your sentences help weave a good story or are they random thoughts that do not link well with the other sentences and paragraphs? Are the sentences in each paragraph unified? Do your sentences and paragraphs communicate your message in a clear and logical way? Your policy manual will be coherent if the relationships between the sentences in each paragraph are clear and logical and the links or relationships between paragraphs and sections are readily apparent.

Write for Your Reader

Who will read your policies? A variety of people may need to review the policies contained in your manual. Certainly, management should read polices that you write. Your hope is that the staff will also become familiar with your policies as they carry out their every-day activities. Sometimes auditors – internal and external - need to read policy to assure that it is being followed. A compliance audit often begins with a review of policy and then the audit team conducts tests to determine compliance. For example, federal bank examiners often review the lending policy of a bank to assure that loan officers are following bank policy on every loan or credit card they grant. Anyone can see how it is critical that a loan policy meet the needs of loan officers, management, auditors, and even the federal bank examiners.

A thorough analysis of your readers' needs before you write is critical. Think about the information you need to convey to the staff of the organization and anticipate questions your reader might have after reviewing your manual. The answers to those questions should then be incorporated into the first draft of the manual.

Professional Writing Style

The critical factors in policy writing just like other forms of writing are: organization, a professional writing style, and proper grammar. This OfficeReady Policy Manual helps you organize your writing by using an outline with relevant headings and subheadings. However, as you customize the manual writing style and grammar are your responsibility.

Here are some tips on writing style:

- Keep your writing simple. Do not use inflated language. Don't make the ordinary seem extraordinary by using big words. Don't obscure meaning by using unfamiliar words and phrases. That approach can frustrate the staff that needs to know exactly the meaning of the policy. When it comes to writing the policy, it's best to strive for simplicity.
- Use jargon judiciously. Jargon is sometimes good because it offers professionals, like accountants and lawyers, a precise and

efficient way to communicate with one another. However, if a reader of your policy is not familiar with the jargon, your meaning will be obscured. Some professionals, especially those with a military or law enforcement background, should guard against the use of jargon from those fields in the corporate or non-profit world. Similarly, policies authored by technical professionals may contain too much "techno speak" for the lay end user.

- Use conservative business language free from typographical errors and misspellings. Pretest the policy before you submit it to the ultimate readers. Part of the approval process of a policy should help with this requirement. More on that later. Find some reviewers who possess the valuable mix of English proficiency and good business judgment. Solicit constructive criticism.

Make It Look Good

Take plenty of time to make the policy look really good, if not stunning. Appearance and presentation are important; they make statements about you and your company. You need to put your best foot forward in every company communication. The entire policy manual should look professional. The formatting and page styles provided by the software should make every page look stunning. Fortunately, OfficeReady Policy Manual has been designed and formatted by document creation experts. However, as you add new content and revise your policy manual, you want to make sure it looks good. Look at every page for appropriate use of charts, tables, white space, and formatting. Find the right balance of text, numbers, charts, and tables. A policy that is cluttered with too many charts, tables, pictures, and diagrams can lose its edge. And remember all the visual elements of a policy are for naught if you do not use a good printer. To assure a professional package, only a high-quality printer will do. A laser or inkjet printer is a prerequisite to business policy preparation.

There is another important reason to pay attention to the design of your policy manual. You want the layout, style, design, and presentation to appeal to the reader and make reading easy. Long paragraphs, crowded pages, poor use of white space, and poor print quality all discourage the reader. Techniques like bullet points, photographs, illustrations, graphs, and charts make your message easier to convey. They also grab attention and allow the reader to move faster through the policy. Crowding a page with information will either intimidate or annoy the reader.

Here is a list of tips to help you create a great looking policy (printed) manual

- Use high quality paper.
- Ensure all printed pages are crisp and clean.
- Achieve good balance between text and visuals (charts, graphs, and tables).
- Use photographs effectively.

- Use illustrations effectively.
- Use bullet points to offset information from the text.
- Use white space effectively.
- Provide an appealing cover for the policy manual.
- Include a letter from the top executive or owner of the organization (i.e., Letter from the President)
- Include professional binding.
- Prepare a PDF version for electronic distribution.[6]

REVIEW AND APPROVAL PROCESS

Every organization that develops policies needs a review process. Some organizations form committees that review proposed policies and policy revisions and after committee approval the policy either takes effect or is submitted to a higher committee – like a board of directors, trustees, officers, or the CEO for final approval.[7] Other organizations utilize a policy review process whereby staff (users of the policy) perform a review followed by a management review before submission to a committee and or senior officials. The staff review is basically a solicitation of comment and feedback. It is a step in the process where ideas are needed to help improve the policy. Someone or perhaps a policy committee must coordinate the review and the submission of drafts to appropriate staff. The policy coordinator requests that the draft document be reviewed and returned by a deadline date with comments included. Here are four possible forms of policy review feedback:

1. The draft seems fine with no further comments.
2. In general the draft seems fine with a few minor exceptions.
3. The draft policy is unacceptable and needs significant changes to be effective.
4. No opinion.

Hopefully feedback like number 4 (no opinion) will be rare because improvements to policy can only happen with constructive feedback from staff.

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[6] OfficeReady Policy Manual has a PDF conversion capability. This means that you can easily convert your policy manual or employee handbook into a PDF document for electronic distribution via e-mail or web site downloads.

[7] It is also common and good business practice to have an attorney review proposed new policies and policy revisions. Policies that have legal implications or are linked to government regulations (i.e., federal banking laws, IRS regulations, employee benefits, equal opportunity, employee privacy, etc.) should be submitted to an attorney for a legal review and comment before they become a final draft to be included in a policy manual or employee handbook.

When a policy or policy manual has been approved it is time to distribute the document. You can do this either as a printed document or via electronic distribution (email or Web site).

Printed Manual

The printed manual must be made available to all employees of the organization for its full value to be realized. Many organizations provide staff with a policy manual in a binder of some type. One common type of binder is the loose-leaf. The loose-leaf, also known as the standard ring binder makes it easy to insert new policies and replace ones that have been revised.

Whether you choose to use a binder or some other means to contain the documents of your policy manual, you should develop a procedure for distribution of new policies. Usually a distribution memo or letter should accompany new policies (or a new manual). The letter or memo (or in the case of electronic distribution an email message) should contain a summary of what is being distributed (i.e., revised policy, new policy, new table of contents, or new manual).

Another way of introducing a new policy or policy manual is through a bulletin or newsletter. A bulletin is an official communication medium of the organization used to communicate items of general interest. Bulletins can be posted on bulletin boards or can be mailed to each employee. An organizational newsletter can also announce and summarize a new policy or policy manual.

Electronic Distribution of Policies

Policies can also be distributed electronically. Since email is so prevalent in organizations, it makes sense that most electronic distributions of policies begin with an email message. Here are some examples:

- An email to all employees announcing a new policy.
- An email with a link to a web site announcing a new policy or online policy manual.
- An email with an attached Microsoft Word or Adobe PDF document containing an entire policy manual or supplements to an existing manual.

OfficeReady Policy Manual has at its heart Microsoft Word policy templates that can be attached to emails or setup as downloads from a web site. In addition, the software lets you convert your policy manual to a PDF document. This means that you can easily send your converted PDF document via e-mail or web site downloads. PDF

(Portable Document Format) was created by Adobe as a standard way to view documents regardless of what software or hardware platform the reader is working with. PDF has quickly become an Internet default - documents on web pages are often uploaded as PDF documents, which can be viewed from the browser window, using free Adobe Acrobat technology (Acrobat Reader).The advantages of electronic distribution:

- No cost for paper, printing, or physical (mail or interoffice mail) distribution.
- Shorter publishing cycle. You can put a manual up on the web much faster than distributing a printed manual to all staff.
- Search and hypertext capabilities

Training

Training employees in the area of policy is very important. Making the policy manual available to staff is a starting point but it is not enough. To help staff to fully understand policies, they may need to see and hear a presentation – an interactive experience that goes beyond the document, email, and PDFs. PowerPoint presentations that help explain new or complex policies can be quite helpful. OfficeReady Policy Manual also contains a variety of useful PowerPoint templates that you can use to develop powerful training sessions.

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ABOUT THE OFFICEREADY POLICY MANUAL

OfficeReady Policy Manual was developed to help you and your management teams make efficient use of your time in developing a cohesive and up-to-date policy manual.

The person or committee who has the responsibility of writing the manual will find this software makes the whole process of selecting, understanding, and tailoring personnel policies much easier than researching and constructing them from scratch.

The OfficeReady Policy Manual contains three example Microsoft Word templates to help you get started: the Office Policy Manual, Office Policy Manual – Brief Edition, and the e-Policy Manual. The Office Policy Manual template is the most comprehensive of the three. It contains sample policies for virtually every important policy area of an organization. In some cases at least two policies alternate policies are offered. Select the policy that is most appropriate and edit it to suit your own company's needs. The Office Policy Manual – Brief Edition is a quick start version of the full manual. It is designed to offer you just enough boilerplate policy text to get started. After a few hours of work with the brief edition, you will have a customized basic policy manual that you can supplement as new policy issues arise.

The third basic template is the e-Policy manual. This is a stand alone template that will help you define your organizations policy with regards to important issues such as e-mail use, use of all information technology systems, and the internet.

Which ever sample document you decide to use as your starting point, you will have a template that will provide you with well written policies that provide a great head start towards the development of a policy manual or employee handbook. [8]These documents are highly polished and formatted.

In addition to well written and expertly designed policies, OfficeReady Policy Manual includes supplemental Word templates including related policy related procedures, guides, checklists, and announcements that go hand and hand with a policy manual.

[8] The contents of the employee handbook are presented in informal language. It should include the basic information concerning the organization and its policies.