

Drafting Effective Information Management Policies

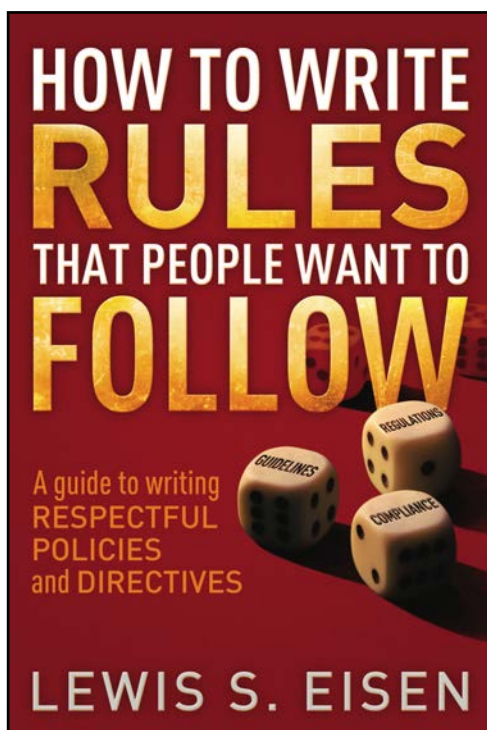
A workshop for people who write rules

Break the Mold of Negativity Around Rules

Every organization needs Information Management policies and standards that govern employee behaviour.

Too often, though, these policies are so long and confusing that no one reads them, and they are written in a way that sounds like angry parents yelling at naughty children.

Getting compliance with your policies and directives under these conditions is an uphill battle.



The challenge is especially acute for subject matter experts who have never been formally trained in policy writing.

In this one-day workshop, policy writers will learn everything they need to know to be able to draft policy instruments quickly, easily, and raising fewer objections. The results will be rules that are clear, succinct, and respectful, inviting compliance rather than impeding it.

The **Perfect Policies** approach has been adopted by policy groups in organizations across the US, Canada, and the UK.

 [Contact](#)

The Workshop

This hands-on workshop leads policy writers through the steps required to organize policies, directives, rules and guidance.

Topics include

- ▶ establishing a policy framework and policy document types
- ▶ selecting appropriate content
- ▶ removing overly aggressive language
- ▶ determining standard elements
- ▶ identifying common policy writing errors.



Participants leave this workshop knowing

- ▶ what belongs in a policy instrument and what doesn't
- ▶ how policies, directives, standards, and guidelines interact with one another
- ▶ how to make requirements strict without sounding harsh
- ▶ how to word rules in a way that's respectful to the people affected.

Policy Structure Template

1	NAME OF POLICY
2	<small>Authority approving policy Approval date Recommended next review date</small>
3	<small>Policy objective (not the the same as the benefits or justification around the policy).</small>
4	<small>1. Policy statements, written in the present tense:</small> <ul style="list-style-type: none"> ◆ with bullets ◆ as required ◆ for simplicity and readability.
5	<small>2. If desired, a statement of responsibility around training, compliance or enforcement.</small>
6	<small>3. Date the policy goes into effect.</small>
7	<small>Location where the policy can be found <URL>.</small>
8	<small>References to other versions, translations, or universally accessible copies of the policy.</small>
9	<small>Identity of office to which enquiries may be directed.</small>
9	<small>Document version</small>

Workshop Materials

Participants at the workshop will leave with

- ▶ a Documentation Framework and standardized list of document instrument types
- ▶ a roadmap of foundational activities to be completed
- ▶ a Policy Suite Health Diagnostic checklist
- ▶ a standard policy template
- ▶ a softcover copy of the book *How to Write Rules That People Want to Follow*

 [Contact](#)

Session Outline (6 hours)

Introduction

- ▶ Goals of administrative policies
- ▶ Characteristics of good policy instruments

Policy Frameworks

- ▶ Foundational documents
- ▶ Distinguishing Authorities from Guidance
- ▶ Distinguishing policies from directives, guidelines, standards and procedures

Policy Statements

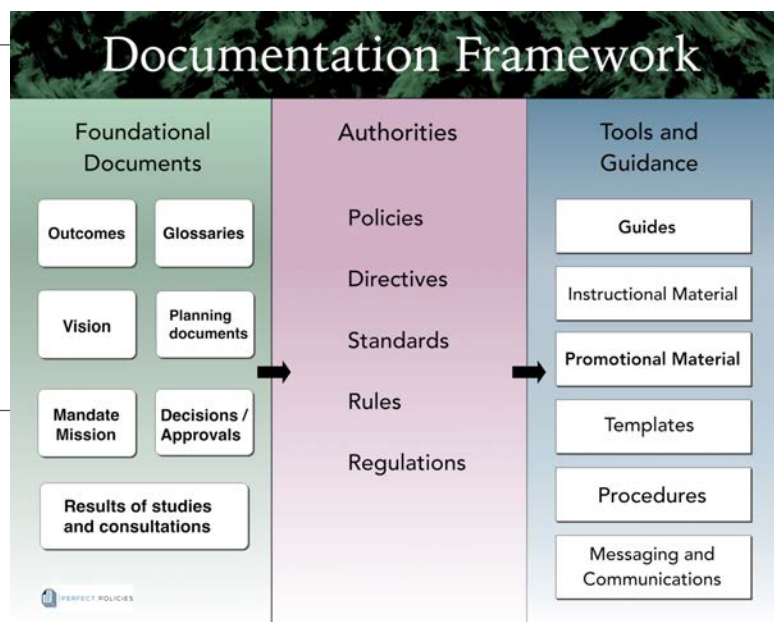
- ▶ Choosing the right content
- ▶ Choosing the right language
- ▶ Words and phrases to avoid

Policy Components

- ▶ Standard elements
- ▶ Terminology and style guides
- ▶ Cross-referencing other documents
- ▶ Best practices

Moving Forward

- ▶ Fixing bad policy documents
- ▶ Developing an action plan for policy refresh



About the Instructor

Lewis S Eisen has been a practicing lawyer, an IT systems manager, and a Senior IM Policy Analyst with the Government of Canada. He has over 30 years' experience working in adult education and business.

Lewis is the author of the international best-selling book *How to Write Rules That People Want to Follow: A guide to writing respectful policies and directives*.



What people are saying...

"Using Lewis Eisen's Perfect Policies approach, we have been able to promote a culture change in our department...[and] ensure that our policies and directives reflect our commitment to maintaining a respectful workplace."

Jeff Ball, Director, Information Management Branch,
Royal Canadian Mounted Police

"Amazing...definitely made an impact on what I'll be doing going forward."

Joanna Hammerschmidt, RIM Coordinator
WaterOne, Lenexa, KS

"In only a few hours, I learned more practical and useful information in Lewis's workshop than I did in a two-day policy writing course I had taken elsewhere."

Mélanie Roy, Information Management Specialist
Global Affairs Canada

"Thanks for helping the US Government learn how to write better policy."

David Simmonds, Senior Records Officer and
Knowledge Management Specialist, US GSA

"The first policy we wrote using the concepts we learned in Lewis's workshop sped through the approval process in one-quarter the length of time it normally takes."

Diane Spencer, Manager
Social Sciences and Humanities Research Council of Canada