

# Who Should Document Organizational Policies & Procedures?

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*Senior-level managers in organizations often over- or underestimate the role employees should take in documenting policies and procedures (P&P) on their operating practices. Solutions to this challenge include engaging the talents of a P&P writer, having stakeholders participate in a P&P information development process, and training employees in P&P writing skills.*

## TYPICAL SITUATIONS

Very often, senior-level managers in organizations make unrealistic demands on employees to develop and maintain policies and procedures (P&P) documentation on their standard operating practices. At the other extreme, senior-level managers may not involve employees to participate in the development and maintenance of their P&P information on their practices. Instead, other individuals formulate and write the content.

### ***Unrealistic demands***

In the first situation, senior management often assumes that “writing” is a talent anyone in an educated society can easily perform. They may further assume that providing employees with sections of a document and a template for format and style will sufficiently assist them in producing an effective P&P document.

Under these assumptions, employees often become frustrated and resentful due to the difficulties they experience in documenting the content into the right context. They often find themselves spending too much time with documentation issues concerning mechanical style and organizational design. They would much rather be doing what they were hired to do, which presumably is where their true interest and talents best reside. In today’s information age, performance-based documentation (which P&P information should be) requires more than the application of good language arts to be effective and usable. It also requires the knowledge and application of principles from such communication disciplines as cognitive science, human factors, display technology (print vs. online), and technical writing.

### ***No participation by employees/users***

In the second situation, employees tend to ignore the documentation because they either have no knowledge of its existence, no sense of ownership in the content, or can’t apply it according to the way they perform. Supervisors, subject-matter experts, outside consultants, and even P&P writers may create documentation without asking for the user’s input, comments, or reviews for whom the information is being developed. These information developers may not be familiar or proficiently trained in P&P documentation development for performance-based needs – a major contributing factor why end-user employees sense no connection to their P&P documents.

## TYPICAL SOLUTIONS

So, what is the solution to who should be documenting organizational P&P? Several typical solutions can be implemented independently or in combination. They include engaging the assistance of a proficient P&P writer, following a participatory P&P information development process, and training employees in P&P writing skills.

### ***Engaging a proficient P&P writer***

One solution is to seek an individual or party proficient in P&P writing or technical writing for performance-based communication. This may be an employee or publications group within the organization, or an outside contractor or technical writing firm. Ideally, the individual or party should have writing and editing as a primary skill or service. It is important to know the desired level of quality in documentation output and the level of expertise the writer is capable of providing.

### ***Following a participatory development process***

A second solution is to develop and follow a P&P information development process. This process is a systematic way by which employees can participate together in planning, designing, developing, and publishing their organizational work practices. The process is usually led and managed by a P&P writer or publications department. The process may vary in its

scope and formality according to the P&P documentation needs and the organization's requirements. An overriding goal of the process is to ensure quality in the documentation's content, context, and usefulness. As a participatory process among stakeholders, this solution shares documenting P&P development among such representative roles as owner, author, subject-matter expert, writer, editor, and user of the document. If done properly, all parties are involved in the documentation development, although writing and editing resides primarily with a P&P writer and possibly secondarily with the others for rough drafts.

### ***Training in P&P writing skills***

A third solution is to train employees in developing P&P information. Senior management must realize that P&P writing is part of the complex discipline of technical writing and that training in this discipline varies in subjects and approaches. Before investing in training, senior management must first determine the level of quality desired in the P&P documentation. They must then determine who will be trained, the type of training, the timing for training, and the expected return on investment. They will need to consider whether to train the employees in P&P writing as a primary or secondary skill set to their jobs. For example, they may have some employees trained more extensively and intensively than others, yet in ways that are complementary to developing P&P information as a team.

## **CONCLUSION**

Documenting P&P should be team effort among the user, supervisor, subject-matter expert, P&P writer, and other stakeholders. Ideally, it is best to have a P&P information development process in place where the various stakeholders can participate to the extent that their roles require. A P&P writer should have a primary skill set in writing and editing information that applies the principles of performance-based communication. If employees who are not P&P writers are involved in writing, they should be trained in P&P writing as a secondary skill set. Their training should be provided at least to the extent that their contribution will support the approach used by the P&P writer.

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