

IMPLEMENTING Policies and Procedures

A JOB AID

Implementation Team and Plans

1. Form a small (4–5 people) **implementation team**. In addition to a team leader or chairperson, include a trainer, performance monitor, and a complaint manager. Also include some frontline staff who will perform the new procedures.



2. Establish a **communication plan for the team**. Agree on meetings and updates—frequency, location, purpose.



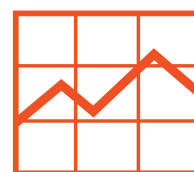
3. Create an **action plan** to tell who is assigned to do what and when. Add to the action plan during implementation. Keep it up to date.

Who?
What?
When?

- In the action plan, include a **target completion date**.



- Also include what **data** from the implementation period will be reported and **who prepares and gets the reports**.



Policy and Procedures Review

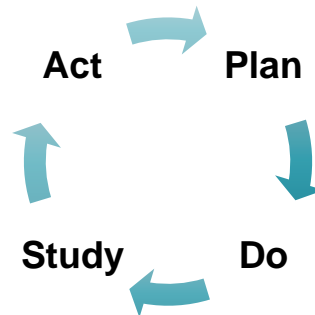
1. Review the **policy and procedures**.



2. Develop any new **strategies** for the new procedures (if not already in the policy).



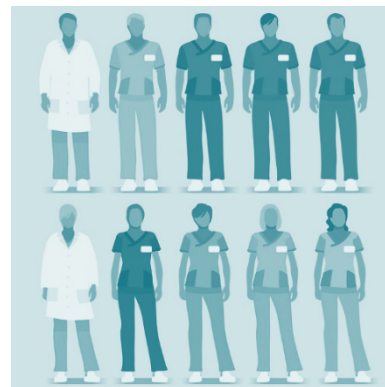
- Establish the process for **pilot testing** any new strategies for the new procedures.



- Create a reference **document** that explains any new strategies for the new procedures.



3. Address any necessary **resources** for the new procedures. For example, acquire new equipment and supplies, and facilitate the hiring of new staff.



Training and Monitoring

1. Prepare any necessary materials for orientation and training on the new policy and procedures. Include specific competency criteria.



- Determine how to address any gaps between training and competency.

TRAINING ►► || ◀◀ COMPETENCY

2. Identify the monitoring and assessment methods for the new policy and procedures.



- Include performance measures that match expectations stated in the policy.



3. Have the implementation team trainer provide training as necessary. Train the team first and then the staff.

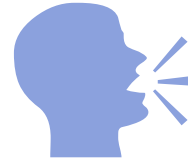


4. Monitor for workarounds: Stop shortcuts if they are unsafe, but be open to process improvements.



Change Management

1. Establish a **communication plan** for the staff affected by the new policy. Agree on meetings and updates—frequency, location, purpose.



2. **Engage staff** on new policies and procedures. For example, conduct regular surveys and be open to informal feedback.



3. Identify and address **barriers** to implementation.



- Monitor and respond to **resource barriers**: problems with staff, equipment, supplies, and space.



- Minimize **cultural barriers**: Post reasons for the changes. Use leaders and staff to promote the changes.



- Use a **blameless reporting system**. Respond quickly to complaints and concerns.

