ORGANIZATIONAL AND HUMMAN RESOURCE MANAGEMENT

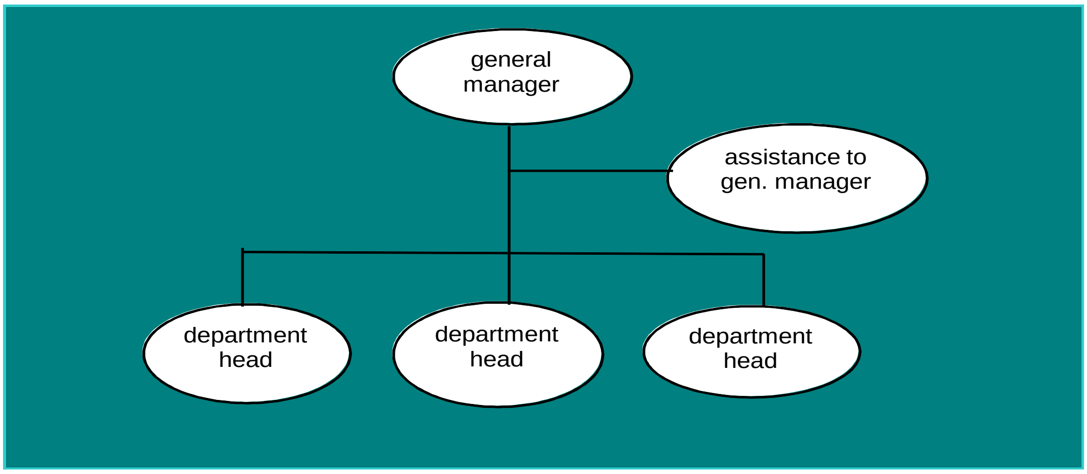
ORGANIZATIONAL STRUCTURE

Sources

David Buchanan & Andrzej Huczynski, 1997,
Organizational Behaviour an introductory text,
Prentice Hall, Englewood Cliffs, Essex, England.

The structure of most large organizations can be represented as a pyramid, as is shown in the figure. It shows that an organization has both a vertical and a horizontal dimension. Its broad base indicates that the vast majority of employees are located at the bottom and are responsible for manufacturing the product or for providing the service. The formal system of the task and reporting relationship coordinates, motivates and controls employees so that they work together to achieve organizational goals.

<u>Definition</u>
Organizational structure is the system of arrangements, pattern or network of relations, between the various positions and their holders.



Organization structure is more than boxes on a chart; it is a pattern of interaction and coordination that links the technology, tasks and human components of the organization to ensure that the organization accomplishes its purpose.

The objective of having an organizational structure appears to differ depending on whether one is designing and managing it, or being managed within it.

Structure is a means for attaining the objectives and goals of an organization.

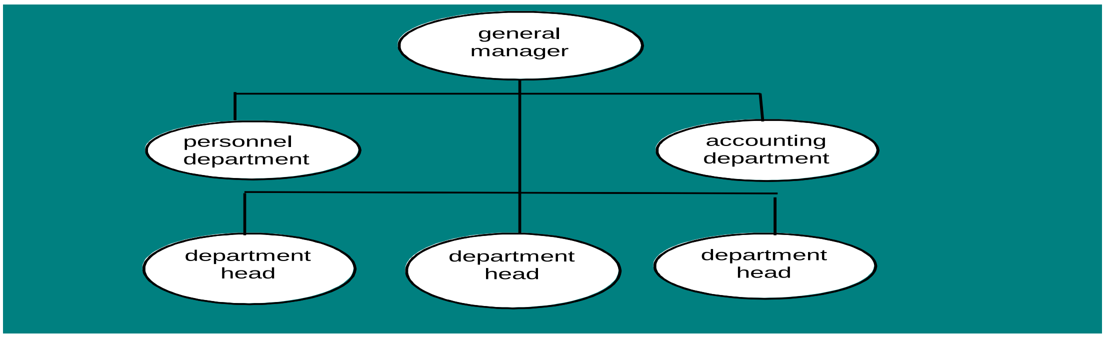
Organization structure is the extent to and the ways in which organization members are controlled by the organization. In addition, it is the distribution of activities and responsibilities and the organizational procedure and regulations.

Elements of organization structure

The structure of an organization signals the behavior of its members

Concerned with	Involves	Exemplified in
How the work of the organization is divided and assigned to individuals, groups and departments	• Allocating tasks and responsibilities to individuals (e.g. what choices do they have about how they work)	• Organizational chart • Job description • Establishing boards committees and working parties
How the required coordination is achieved	• Specifying and defining jobs • Designing the formal reporting relationships • Deciding on the number of levels in the hierarchy • Deciding on the span-of-control for each supervisor/manager.	• Rules, policies, procedures • Hierarchy • Goal definition • Temporary task forces • Permanent project teams • Liaison roles • Integrator roles

The organization can be viewed as a complex system, which consists of four mutually interacting and independent groups of variables: organizational objectives, company structure, technology used and people employed. All these were affected are the environment (i.e. economic, political or social situation). The differences in organizational structure can be accounted for by the interaction of these elements.



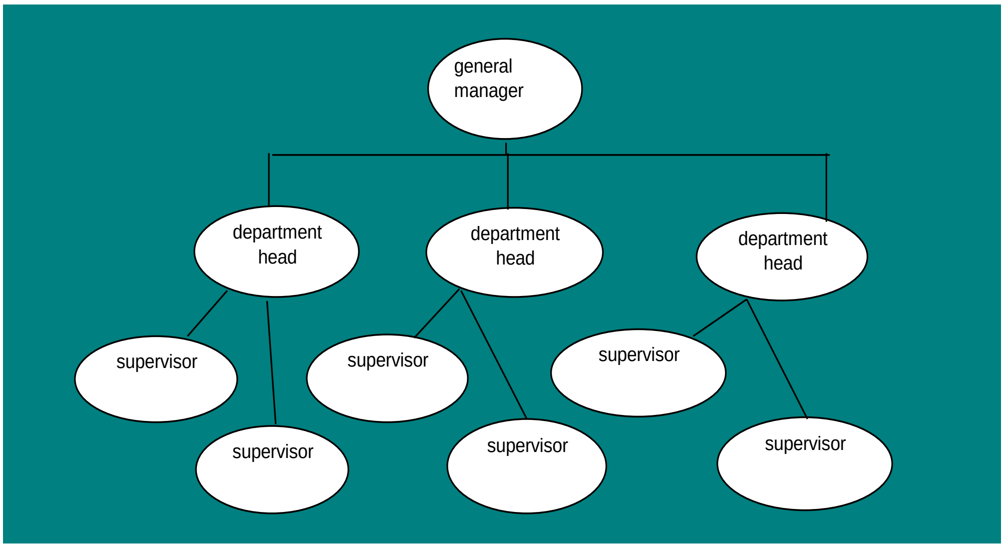
Types of job

Job specialization

Job
(a) Definition: Refers to the task requirements of each job in the organization. It is the first decision in the process of organizing.
(b) Description: Is a summary statement of what an individual should do, or actually does, on the job.
Organizational Chart
Definition: Is a pictorial representation, which shows the formal relations the company intends to have.
Hierarchy
Definition: Refers to the number of levels of authority to be found within an organization. Hierarchy is a co-coordinating and integrating device intended to bring together the activities of individuals, groups and departments, which were previously separated by the division of labor and function.
Span–of-Control
Refers to the number of subordinates who report to a single supervisor or manager and for whose work that person is responsible.

The organizational structure can be classified into three main types: line, staff and functional. The basic one, however, is the line structure, and this is a feature of every organization, irrespective of its size. The staff and functional types are modifications of the line structure, which have been made necessary because of an increased complexity in its operations. These two other forms usually exist in combination with the line structure.

First of all it is important to define the concepts of authority, responsibility and accountability.



Definitions:
Authority is the right to guide the actions of others and to extract from them responses which are appropriate to the attainment of an organization's goal.
Responsibility is an obligation placed on a person who occupies a certain position in an organization structure to perform a task, function or assignment.

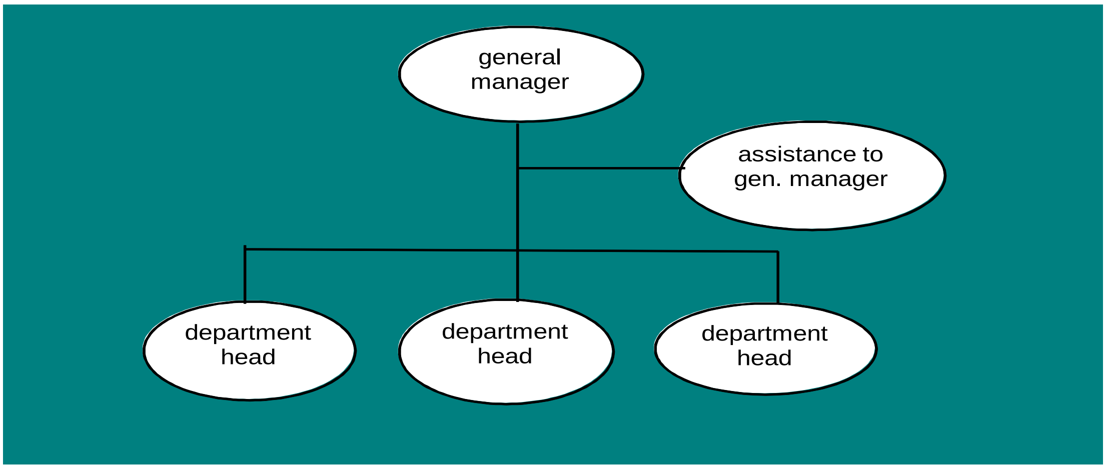
Accountability is the obligation of a subordinate to report back on their discharge of responsibilities, which they have undertaken.

Line structure
A company's line structure consists of the direct vertical relationships, which connect the positions at each level with those above and below. It is a series of superior-subordinate relationships, which are collective, referred to as the organization *chain-of-command.*

Line structure
Every individual in an organization reports to a superior from whom he receives orders, instructions, help, approvals and commands. That same superior has the authority to direct the activities of those in a position below on the same line. Thus in the organization chart shown, the departmental manager has the authority to direct the activities of her supervisors. All these people are in line relationship with each other.

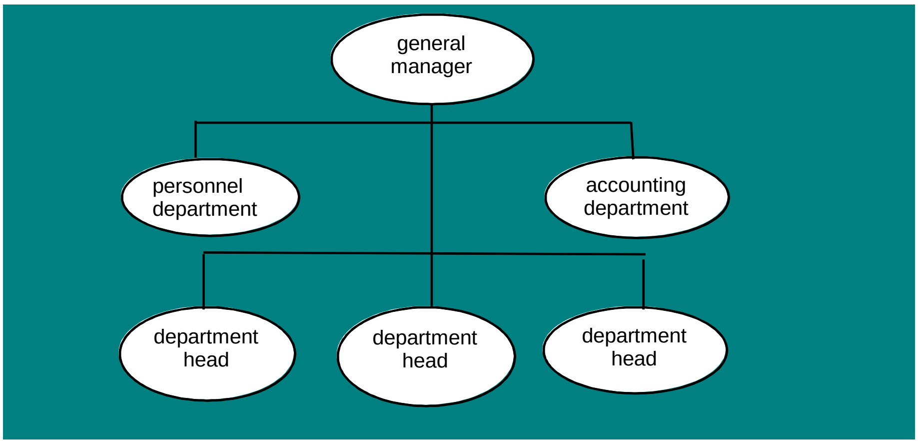
Staff structure
As long as an organization is small and simple, and its leaders can exercise effective direction and control, then a line structure will be adequate. A line structure deals with a company's core task, which involves producing basic goods or services. However, once a company becomes larger and more complex, then some modifications to its existing line structure will be required.

Definition
Staff employees are workers who are in an advisory position and who use specialized expertise to support the production efforts of line employees.



Functional Structure

Definition
A **functional relationship** exists where a staff department has the authority to insist that the line manager implement its instructions concerning a particular issue.



The functional specialist (in this case personnel or accounting) in their function remains accountable to the boss who issues the instructions. If the general manager requires functional assistance to be given to the subordinates in some area such as accounting, they have to delegate some of her own authority to the functional specialist concerned.

Authority and position

The organizational chart shows formal relationships that exist between positions or offices within an organization. The chart therefore indicates positional authority (i.e. the authority to direct the activities of persons below in the line relationship based on the position which one occupies). Formal authority in an organization is assigned to positions and not to people. Position authority is distributed according to the hierarchy and the person occupying positions at upper levels in the organization have more power, and exercise more control, than those at successively lower levels. The exercises of authority increase the probability of orderly, regular behaviour. The authority relationship can be traced on an organizational chart by following the lines downwards.

STOP !
Explain the differences and relationships between the concepts of responsibility, authority and accountability**.**

Difficulties can arise when an individual has responsibility for some work, but lacks the concomitant authority. For example, the supervisor may be held responsible for the punctuality of his workers, but is not given the authority to discipline them if they show up late. The converse of this situation may also cause difficulties when a person is empowered to make decisions, but is not held responsible for the results. For example, decisions to appoint employees to a line job may be made by personnel specialists rather than by the line manager.

STOP !
Starting with your own position within the organization, institution or college, indicate the different levels of hierarchy above and below you. Add in any other relationships (staff or functional) which clarify your position.

Defining roles

A role may be viewed in different ways. There is disagreement among social scientists on this issue. Definitions of roles depend on how they are to be used. We shall consider prescriptive (narrow), evaluative, descriptive and action definitions for the concept of roles.

A ***prescriptive*** definition is concerned with what a person should do when he plays a specific role. Job descriptions, which are sent along with job application forms, represent examples of prescriptive role definitions.

An ***evaluative*** definition, in contrast, assesses how well or poorly a role is being performed. To do this it is necessary to established criteria or standards against which to make assessments. A role prescription can supply such standards.

In organizations, staff appraisal schemes aim to set criteria in order to monitor and evaluate individual role performance. Staff appraisal could be considered to be part of the procedure intended to pattern, and make predictable, the behaviors of organization members.

A ***descriptive*** definition of a role is based on the actual duties performed by the person being studied. Such a descriptive role statement can be developed by observing and noting in minute detail what a person does. Such forms of analysis have been carried out by researchers who have studied how managers spend their time. These analyses contain the content of the work done alone as well as the nature of the interactions engaged in.

Finally there is an ***action*** definition of a role. While a job description may give an account of the duties that should be undertaken by someone playing a specific role, in pursuing these duties many actions may be performed. A role can, therefore, be specified in terms of the actions involved in its performance. Any role may thus be considered under the four aspects of prescription, evaluation, description and action. All four are interrelated and interdependent.

<u>Definition</u>
Role relationship is that intangible mixture of feelings and emotions, which exist between two or more people occupying different roles.

A relationship can be considered as the way in which one uses oneself in a disciplined and responsible way when dealing with a group or individual. In achieving his goals and fulfilling his duties, the organization member can use his "good" relationships with colleagues, bosses, clients and customers to help him to achieve his aim at work. For example, getting support for a new plan action the individuals needs to be aware that the other people also have needs and feelings, and should show concern for these and be aware of others' responses. Failure to do this can lead to a breakdown in relationships.

Individuals have **role relationships** with each other, and organizations can be thought of as a set of overlapping and interlocking role sets. A role influences the behaviour of an individual by setting limits within which he is expected to act. Roles in organizations are learned through socialization.

Many of the tasks involved in the job have been learned and assimilated too well that they become accepted as being part of the person. This raises the question of whether, in behaving in a certain way; we are ourselves or just conforming to what the organization (and society) expects of us. **Role relationships** therefore are the field within which behaviour occurs. People's behaviour at any give moment is the result of:

- Their personalities

➢ Their perception and understanding of each other
➢ Their attitudes towards the behavioural constraints imposed by the **role relationship**
➢ The degree of their socialization with respect to constraints
➢ Their ability to inhibit and control their behaviours.

Such sharing of behaviour, attitudes and personalities can come about in an organization through the staff selection process (self-selection and company selection); through training (role behaviour results from carefully created training courses and spontaneously created initiation ceremonies); and through the job itself (new organization members are exposed to job demands and are pressured to performed in a certain way).

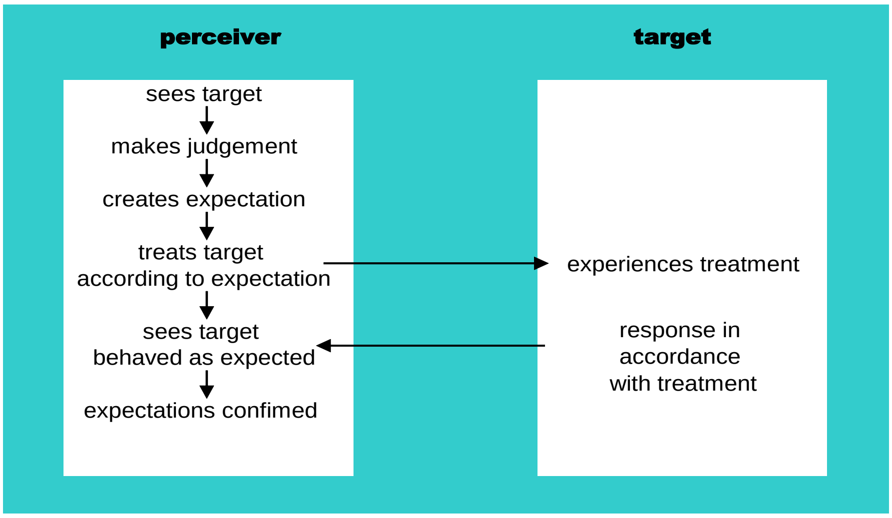
Rosenthal and Jacobson, 1968, studied whether supervisor's behaviour may improve employee performance. Rosenthal identified four factors which produced the effect:

Climate The supervisor's expectation leads them to treat workers differently. Such differences are manifested in their eye contact, smiling, nodding, posture, and tone of voice. Their expectation is transmitted in this way.

Feedback More detailed and accurate information is given to workers about their performance. The supervisor can say how they can improve, rather than just a general "well done".

Input The supervisor gives workers more demanding tasks to perform that stretch them.

Output The supervisor gives the developing worker cues to respond to, for example, by asking questions.



ORGANIZATIONAL DEVELOPMENT

Sources

David Buchanan & Andrzej Huczynski, 1997, *Organizational Behaviour an introductory text*, Prentice Hall, Englewood Cliffs, Essex, England.

Organizational development has been defined in a number of different ways. However, most definitions share the same characteristic, and this is not a particular controversial matter when the topic is considered in general terms.

Definitions

Organizational Development (OD) is an effort (1) planned, (2) organization-wide, and (3) managed from the top, to (4) increase organization development and health through (5) planned interventions in the organization's "process", using behavioural science knowledge.

By Bachard 1969

OD as a response to change, a complex educational strategy intended to change the beliefs, attitudes, values and structure of organizations so that they can better adapt to new technologies, markets and challenges and the dizzying rate of change itself.

By Warren Bennin 1969

OD as a planned systematic process in which applied behavioral science principles and practices are introduced into ongoing organizations towards the goal of increasing individual and organizational effectiveness.

By Wendell French

The OD matrix: levels and models of intervention

The OD toolkit includes a large and expanding number of intervention (involvement) techniques (or strategies). In fact, many of the approaches to organizational improvement – job enrichment, assessment, team building, and participative management – can be regarded and used as OD interventions.

Definition

An organization development or ***OD intervention*** is a specific methodology or technique used to affect change in the target organization or section of the organization, to improve the organization's effectiveness.

Characteristics of the effective and ineffective organization

structure related to goals	no link between goals and structure
flexible forward planning	focus on immediate pressing problems
consistent clear procedures which evolve purposefully	bureaucratic rigidity, or constant change without rationale
meaningful, varied work with learning opportunities	narrow, repetitive jobs with little learning opportunity
commitment to personal growth (planned skills development)	contemp for individuals and groups
power recognizing mutual influence	politicking and defensive cliques
flexible, participative decisions	what the boss says, goes
information openness	secrecy, gossip, failure to listen
mutual trust, support, respect	individualistic, selfish, everyone works for themselves
accurate, timely performance feedback	unclear, e.g. what did the boss mean by that?
just and equitable rewards	apparently arbitrary rewards
constant scanning of environment and appropriate ajustment	failure to perceive and act on critical environmental changes
initiative in external relations	reactive, selective responses
well-defined concept of social responsibility	"don't care" attitude towards community values

Problems in organizations can arise at different levels:

1. Organizational level
2. Inter – group level
3. Group level
4. Individual level

Let us examine briefly these levels. One particular individual may be having difficulties with the work; it's too difficult, not challenging enough, no future prospects, etc. A group or team may not be 'functional' effectively; lack of leadership, poor relationship, personality clashes, or the team is lacking cohesion. Two or more groups may find themselves in (inter-group) conflict for some reason; unwilling to cooperate or liaise, differences in outlook, physical distance, conflict of priorities. The whole organization may experience low morale, be out of touch with its environment, lack an effective structure, and lack a clear strategy.

Organizational diagnosis and choosing the appropriate OD intervention: the Pugh OD matrix

organizational level	poor morale, pressure, anxiety, suspicion, weak response to environmental changes *survey feedback, organizational mirroring*	inappropiriate and poorly defined goals, unclear strategy, inappropriate structure, inadequate environmental scanning, *structural change*	geografphy, product market, labor market, technology, physical working conditions *change strategy, change location, change conditions, change culture.*
inter-group level	sub-units not co-operating, conflict and competition, failure to confront, differences, unresolved feelings *inter-group confrontation, role negotiation*	no common perspective on task, difficult to achieve required interaction *redefine responsibilities, change reporting relations, improve liaison mechanisms*	differences in sub-unit values and lifestyles, physical barriers *reduce psychological and physical distance, exchange roles, arrange cross-functional attachments*
group level	inappropriate work atmosphere, goals disputed, inappropriate leadership style, leader not trusted or respected, leader in conflict with peers and superiors, *process*	task poorly defined, role relations not clear, leader overloaded, inappropriate reporting structures, *redesign role relations, autonomous groups, socio-technical system*	lack of resources, poor group composition, inadequate physical facilities, personality clashes, *change the technology, change the layout, change group membership*
individual level	individual needs not met, frustation, resistance to change, few learning and development opportunities *counselling, role analysis, career planning*	poor job definition, task too easy, task too dificult *job restructuring or redisign, job enrichment, clear objectives*	poor individual-job fit, poor selection or promotion, inadequate recognition and reward *improve personnel procedures, improve training, align recognition and reward with objectives*

OD technique: the toolkit

Designing a package of OD intervention is a creative assignment. The main and popular intervention techniques are these

- Change the structure
- Process consultation
- Survey feedback
- Team
- Inter-group development
- Role negotiation
- Sensitivity training

Change the structure
There are numerous ways in which the structure or design of an organization can be changed. Examples include the techniques of: job rotation, job enlargement and job enrichment. It is possible to change the degree of centralization or decentralization within an organization, or to flatten or extend the organizational structure, or to change the basis of the organizational design. Structure has a significant influence over access to information and other resources, work experience and careers opportunities, as well as the degree of discretion.

Process consultation
Process consultation engages an external consultant in a flexible advisory capacity, helping specific individuals to improve their understanding of internal organizational problems, and helping them to identify appropriate problem-solving action. The process consultant may or may not be knowledgeable with respect to the problems or challenges facing the organization and its members.

Survey feedback
Survey feedback means just what the term implies. The results of employee opinion surveys are fed back to managers and employees, to help in identifying the action that will improve organizational effectiveness. A typical opinion survey will include questions on leadership and management style and aspects of organizational culture such as communications, motivation and decision-making, and member's satisfaction with the organization, their job, their supervisor, their pay and their work group. A survey can cover the whole organization, or just a department or section. The most popular approach for achieving this is through group discussion, working parties or project teams, with each individual working on a particular set of themes or issues or directing their attention to a particular section of the organization.

Team-building
Team work, or group work, is fundamental to the organization functioning properly. Team building is an OD intervention, which seeks to improve team performance by helping members to understand their own team roles more clearly and to improve their interaction and collaboration.

Inter-group development
It is common to find that sections, functions or departments in an organization develop their own unique perspectives and behaviors, which prevent effective interdepartmental communications and collaboration. Within a single unit or function, group's different goals, background and working practices may find it difficult to work together when required. OD has, therefore, tried to find ways to improve inter-group relationships and work arrangements.

Definition
Inter-group development is an *OD intervention*, which seeks to change the perceptions and attitudes that different groups in an organization hold with respect to each other, and to improve their interaction and collaboration.

One variant on the inter-group development technique is known as "organization mirroring". This involves the target group seeking feedback from other groups in the organization on how it is seen and perceived, in this approach, several groups may be involved, and representatives from the other groups are only involved in providing information and ideas, rather than in full negotiation or confrontation with the target group members.

Role negotiation

Role negotiation can be a useful way to reconcile differences between two individuals whose working relationship is ineffective. The approach is similar to inter-group development.

Definition

Role negotiation is an *OD intervention,* which seeks to change the perceptions and attitudes that different individuals in an organization hold with respect to each other, and to improve their interaction and collaboration.

The technique assumes that interpersonal friction is caused, at least in part, by a lack of shared awareness and by misunderstandings. The aim in **role negotiation** therefore is to make individual perception and mutual expectation explicit, so that differences can be identified and resolved.

Other approaches: change systems and procedures

Beyond structure change and a number of specific tools, OD uses a range of other methods to change organizational culture, to encourage individual growth, to foster inter-group collaboration and to improve organizational effectiveness. There are many other ways in which to encourage the members of an organization to change their attitude and actions. The organization sends signals about what behavior is value through the design of its staff appraisal system, where individuals discuss their goals and their performance at least once a year with their managers. The effect of appraisal can be supported by planned *career counseling and development syste*m designed to reinforce the same messages. Required changes in skills, knowledge, attitude and behavior can be encouraged through special tailored *training and development programmes.* Communications and working relationships can be improved through a range of mechanisms, such as *conferences, workshops, discussion groups and project teams*. These mechanisms can focus on particular groups or can bring together staff from different sections and levels of the organizational structure.

OD applications

The factors that OD seeks to change include a broad spectrum of attitudes and values, as well as many quantitative indicators of organizational performance. The target of a typical OD programme may be the improvement of teamwork, or the enhancement of work relationships between groups or departments, or the improvement of the performance of the organization as a whole, or target all of these levels. There may even be disagreement about which measurement or indicators are most significant.

Don Warwick (19984) listed ten potential positive results from OD interventions:

1. improved organizational effectiveness, including better productivity and morale
2. better management throughout the organization
3. commitment to and participation in making the organization successful
4. improved teamwork
5. better understanding of organizational strengths and weaknesses
6. improved communications, problem-solving and conflict resolution
7. creativity, openness, opportunities for personal development
8. decrease in dysfunctional behaviour (i.e. politicking, playing games)
9. increased ability to adapt to changing circumstances
10. increased ability to attract and retain quality people

POLICIES AND PROCEDURES MANUAL

The purpose of a policies and procedures manual is to provide employers, managers and employees with a systematic approach to the implementation of policies, plans, and work routines.

A properly developed manual can achieve the following benefits for your organization:

Conveys Management's Philosophies
Your manual should be used to communicate both corporate both policies and the appropriate procedures for the implementation of the policy in a combined style format.

Policies should not be confused, as is seen below:

Policy – A definite course or method of action to guide and determine present and future decisions. It is a guide to decision making under a given set of circumstances within the framework of corporate objectives, goals and management philosophies.

Procedure – A particular way of accomplishing something, an established way of doing things, a series of steps followed in a definite, regular order. It ensures a consistent and repetitive approach to actions.

Improves Communications
A well designed manual is an invaluable communication tool for efficiently running operations within departments and bridging the gap between interrelated departments. A comprehensive manual covering all departments within your organization can become a quality manual for the whole organization. This will help ensure optimal operations and consistent delivery of the finest in product or services from your organization.

Reduces Training Time
Your policies and procedures manual will be a functional guide for training new and existing employees and should prevent difficulties in performing duties due to a lack of understanding or inconsistent approaches from personal changes.

Improves Productivity
Written policies and procedures can speed up decision making processes by managers and employees by having a handy, authoritative source for answering questions. Also a well developed and documented manual can ensure compliance with regulatory agencies affecting your business such as the occupational Safety and Health Administration, Food and Drug Administration, government contracting authorities, and independent certification organizations.

Strengthens Operations
A properly implemented manual can strengthen the organization's quality control, management, marketing, production, engineering and systems for financial control. A manual serves to translate the organization's business philosophies and desires into action.

Who Should Use the Policies and Procedures Manual?

In practice, policies and procedure manuals are distributed and used by different individuals from organization to organization; however a catch phrase of the 90s was 'the empowerment of the individual to make decisions independently without the need or time delays of involving various levels of manager'. A well thought out manual can enable just about anyone in your organization with the ability and flexibility to make the right decisions in their job responsibilities.

For example, a Program Manager should be able to handle a client's problem and have the authority to resolve the problem right on the spot. Or a finance director should be able to diagnose a problem and formulate and resolve the problem without having to go through various channels up and down the organizational ladder.

These front line workers can gain their empowerment to make time saving decisions through policies and procedures that affect their functional area. An effective manual also provides the appropriate methods for interdepartmental communication to allow staff to work together to resolve day-to-day business problems without requiring unnecessary supervisory involvement.

The goal of the policies and procedures manual should be to design the contents to pertain to the ways and means of communicating, getting the service performed, or the product manufactured at the lowest cost, in the minimal amount of time, with the added benefit of maintaining job satisfaction and high employee morale.

Therefore, everyone in your organization should have a manual available for their access. Due to the cost of producing and maintaining the manual, it is not necessary to issue a manual to every employee but one should be available from their supervisor or in a designated area in each functional location.

Organization of the manual

Careful organization of the manual will be vital to the manual's readability and usefulness. In deciding how you will organize your manual, you will need to be concerned with how it is going to be set up, what policies and procedures will be covered and how to efficiently handle later updates or supplements and ease the employees into quickly finding and gathering the information they need.

A guide for the organization of your manual is described briefly below:

1. *Foreword* - The foreword serves as an introduction to the manual as a whole by presenting a concise summary of the organization's mission statement, operating objectives and management philosophy. Sometimes the foreword can be in the form of a letter from the Executive Director emphasizing top manager's philosophies and support for the policies that follow. This serves to unify the Board of Directors and signify the importance of the manual and help to determine the theme of the manual.

2. *Table of Contents* – A table of contents should be provided to allow employees to quickly find their area of interest and serves to outline the organization of the manual. The table of contents should be placed at the very beginning of the manual. The table of contents

should at a minimum list headings of major groups or classifications of policies and procedures. A secondary table of contents should then be prepared for each section of the manual listing individual policy and procedure statements and their location.
As an alternative, if the length of the manual and the frequency of revisions will be kept to a minimum, it may be useful to list the individual policy and procedure statements under the major headings on the main table of contents. This will allow employees to determine the location of the section and policy and procedure statements quickly from the front of the manual.

3. *Organization of Policy and Procedure Statements* – The Policies and Procedures manual should be organized according to functional areas or departments. This will facilitate an easier use of the policies and procedures by employees relating to their area. This also allows the manual to be subdivided into volumes in order to deal with large quantities of policies and procedures.

A manual grouped by departments or functional areas also allows for the authorization of new and revised policies and procedures to fall under a department head or supervisor and ensures a consistent approach to policies and procedures within areas.

Department or functional areas may include:

- Accounting
- Administration
- Business Expense and travel
- Client Service
- Data Processing
- Fund Raising
- Human Resources
- Inventory Control
- Personnel
- Public Relations
- Purchasing
- Receiving
- Research and Development
- Training and Continuing Education
- Warehouse

4. *Optional Areas* – You may also want to include additional sections to the manual that relate to other operational matters in your organization such as organizational charts, descriptions, organizational forms and internal reports. The addition of these sections can provide one cohesive and informative source for employees to access all questions relating to the operations of the organization.

5. *Index* - Depending on the length of the manual, it may be appropriate to have both a table of contents at the beginning and an index at the end of the manual.

The index comes in handy primarily when the number of policies is so voluminous that it would be time consuming to have to search through the entire table of contents to find a particular area of interest.

An index is also useful when it is unclear which heading of a particular policy and procedure statement might fall under or when a policy and procedure statement applies to multiple functional or departmental areas. Use of the index will allow employees to cross reference areas or to find the topical area of interest by searching through an alphabetical listing.

The index should not be completed until the majority of the policy and procedure statements have been written and approved. An easy method for accomplishing development of the index is to review the final draft of the statement and page number. Then rearrange this list into alphabetical order for the development of the index.

When you are in doubt as to which word or words of a specific policy should be indexed under, put yourself in the user's place and decide which subject an employee would be most likely to look under first. If there is no clear indication, then the index should have multiple entries.

DEVELOPMENT OF POLICY AND PROCEDURE STATEMENTS

Before you begin organizing and compiling information in preparation for writing the manual, you should evaluate the following steps:

1. Choose the personnel who will have the authority and responsibility for preparing the sections for the manual and who will have the ultimate authority over the entire manual.
2. Determine the desired content of the manual including what should and should not go into the manual.
3. Outline the major sources of information for the manual.
4. Determine the proper communication format of policy and procedure statements to ensure that all organization employees write them for clarity and have a thorough understanding.
5. Determine the final format and organization of the manual.

Responsibility for Preparing the Manual.

It is recommended that a top officer or manager in the organization assume the responsibility for the overall production and maintenance of the manual. This individual should then assign different personnel in the organizational sections of the manual to be covered.

This individual should have the necessary experience and ability to develop or approve the policies and procedures that affect their department or functional area. These individuals or managers will be responsible for ensuring that all policy and procedure statements that exist in their functional area or department are documented in the manual. They also should have the authority to review and approve policy and procedure statements under their control. If appropriate, the organization's top management may wish to review and determine corporate policies with these individuals prior to preparing the manual and on as needed basis thereafter.

These managers will be responsible for keeping their sectional areas current and up-to-date with the current needs of the organization. The business climate is constantly evolving and changing and so should your policies and procedures manual.

Production and Distribution

Once a policy and procedure statement has been authorized for release it should be duplicated on standard white copy paper and three-hole punched on the left margin. Multiple page statements may be corner stapled to prevent losing pages until it is included in the manual.
The number of copies of the statement should correlate to the number of manuals that have been distributed. It is generally advisable to designate one individual in the organization for the production of statements. This individual can keep track of the number of the manuals issued and can ensure that new or revised SOPs are distributed to the appropriate personnel or departments.

Management of the organization should decide which departments or positions will receive copies of the manual or as an alternative, sections of the manual may be distributed which pertain only to a specific function or department.

However, if the manual is to serve as a communication tool, enough copies of the manual should be readily available to employees.

Revising and Updating Existing Statements

As mentioned previously, the policies and procedures manual is never “complete” in regards that it never stops changing or evolving to keep pace with needs of the business climate.

All employees should be encouraged to initiate changes or revisions to existing policy and procedure statements that affect their area of responsibility. This will assist the organization in keeping their manual current and up-to-date.

In addition to this continual review process, the entire manual should undergo a complete audit as often as changing conditions occur both within and outside the organization. This may be every year or every few years depending on the organization’s business environment.

A new SOP should be issued if an existing statement is to be modified in any way. The revised SOP should undergo the same approval process as the initial statement and should be assigned a new revision number level to indicate that it supersedes the previous statement.

Superseded statements should be purged from the manual immediately and then discarded.

SOURCE

McCalling, E. M. (1995): *The Complete Policies and Procedures Manual for Non-Profit Organizations*. American Business Resources, Inc.

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