JUMP START POLICY DEVELOPMENT

"Git-R-Done"

Avonte Jackson, Clinic Director
Grace Clinic, Kennewick WA
September 16, 2022
Presented at 2022 Washington Free and Charitable Care Conference

USA
USA

ACCOUNTABILITY. BUILDS ENGAGEMENT. ROAD MAP.

'Three Reasons Policies and Procedures Matter for "Nonprofit" Organizations' by Susan Manuel

A FEW (MORE) GOOD REASONS

Sustainability

Succession planning

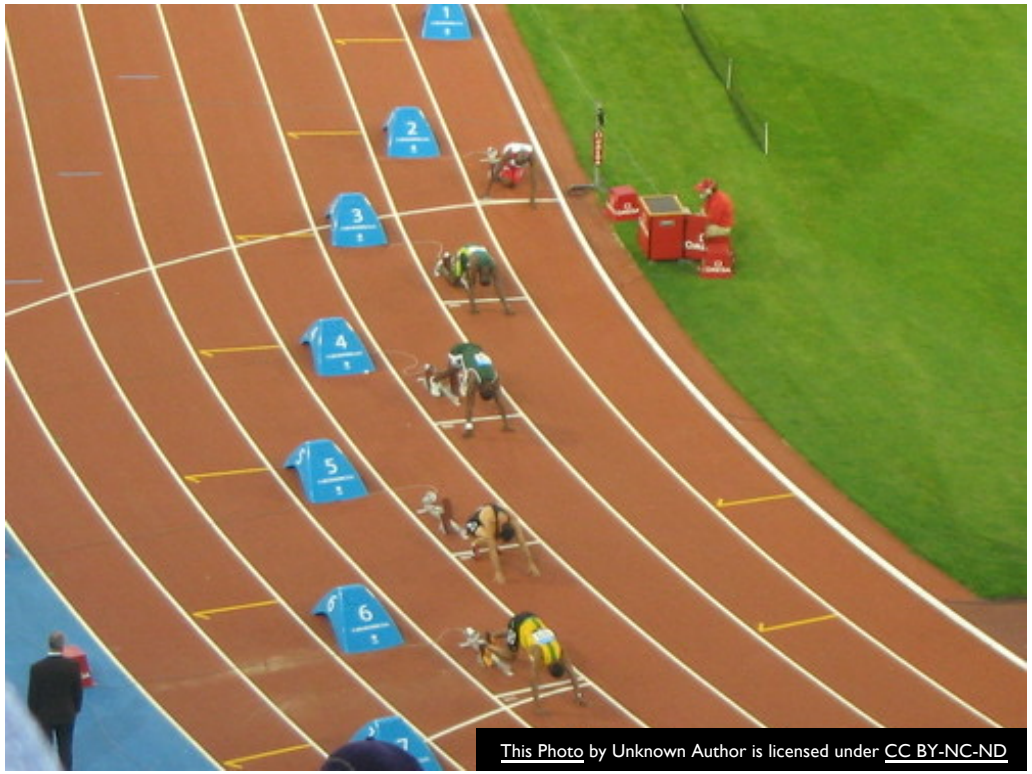
Stability

Strength

Does the state of our current policy manual **DEMONSTRATE** our commitment to policy development?

CAN I PROVE IT?

GIT-R-DONE APPROACH



PRIORITIZE

DOCUMENT

COMPLIANCE

PRIORITIZE
Shifting Focus

Make policy development and documentation a **HABIT** rather than a project.

PRIORITIZE

- WHAA & NAFC Quality Standards
  - Membership status N/A
  - Use as an assessment tool and roadmap
- Shared Documents

Make policy development and documentation a habit rather than a project.

wahealthcareaccessalliance.org

NAFC QUALITY STANDARDS SEALS

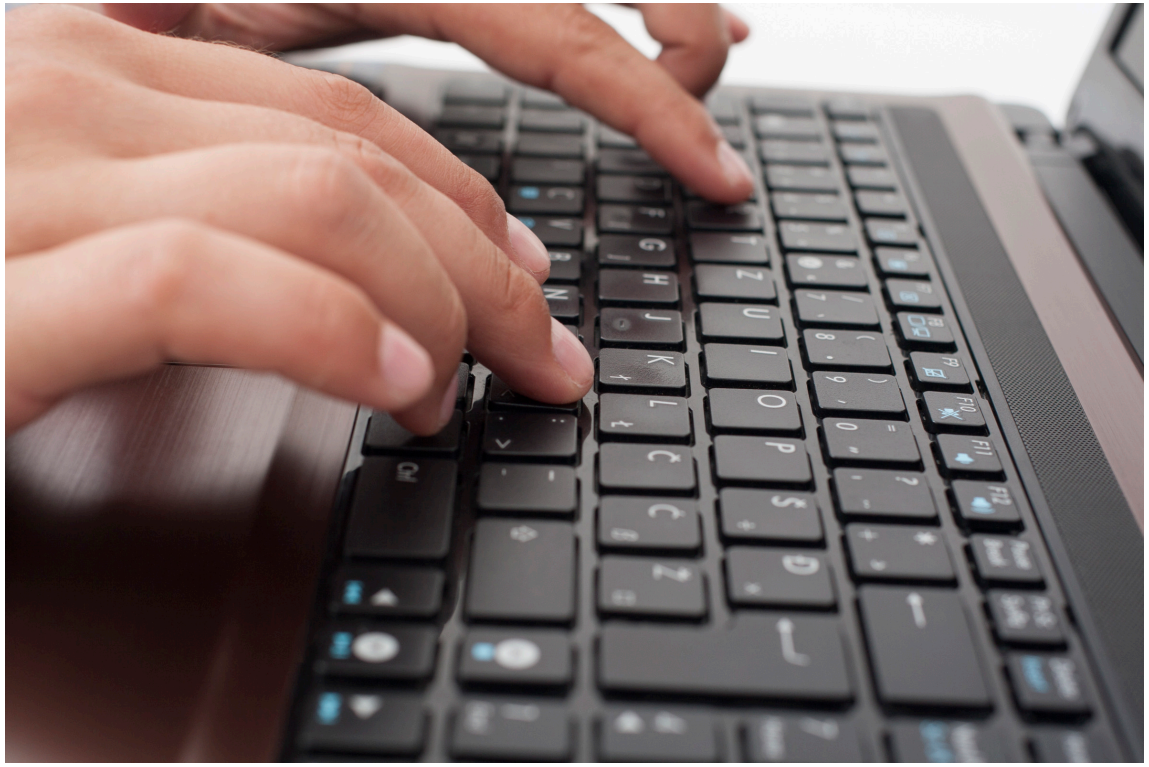
PRIORITIZE

- Other Resources
  - Nonprofit Association of Washington
    - *Formerly known as Washington Nonprofits*
  - Nonprofit Association of Oregon
  - National Council of Nonprofits
  - LinkedIn for Nonprofits
  - Google Searches
  - IRS Form 990

nonprofitwa.org

DOCUMENT

- Create an audit file
- Document decisions immediately (draft policy)
- Develop written procedures
- Delegate

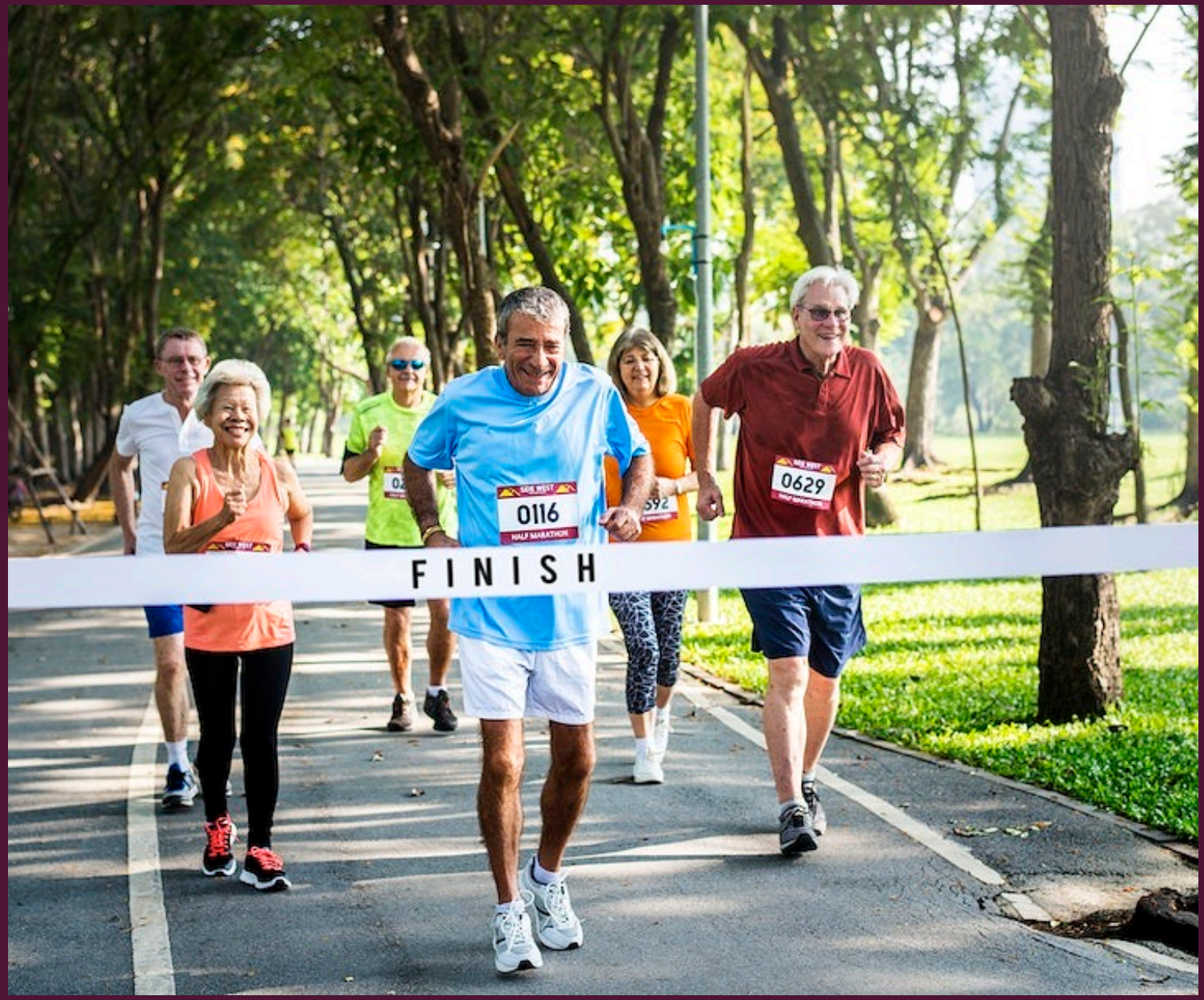


This Photo by Unknown Author is licensed under CC BY-SA-NC

COMPLIANCE

- Finalize
- Communicate

SUMMARY – IT'S A HABIT NOT A PROJECT!

- Comply with regulatory guidelines
  - 990, State and Local Laws, etc.
- Select a guide for best practices
- Gather & store in one spot
  - Binder, computer folder, Google drive)
- Document daily
  - Personal notes aren't good enough.
- Involve the whole team

QUESTIONS
DISCUSSION
CRITIQUE
FEEDBACK
TAKEAWAYS