Policies and Procedures:
Can’t Live with Them.
Can’t Live without Them!
Overview

• Why Have the Stupid Things?
• Policy and Procedure Defined
• Start with Important Issues
• Borrow some?
• Writing them
• Training to them
Why Have the Stupid Things?

• They are about as dry to read as saltines with lint.
  – They are **Required**.
  – They help with **Daily Decision Making**.
  – They enhance the **Quality of Services**.
  – They help keep the **Integrity of the Program**
  – They assure **Services will Continue into the future**.
  – They assist with **Staff Training**.
  – They help keep the Elders Good (and not-so-good) Ideas in line with **Program Requirements**.
Policy

• A definite course of action to guide and determine present and future decisions.
• Guided by Regulations/Laws
• Written by Managers
• Used as the basis for program management, development, and staff training
Policy Benefits

• Serve to guide staff in routine performance.
  – You don’t have to be there all the time.

• Provide healthy boundaries that support the programs priorities.

• Provide new staff training and direction.

• If followed, provide a defense when challenged.

• Keep a level playing field for participants, staff, and administration.
  – If applied properly, they are the same all the time.
Procedure

- A particular way of accomplishing something
- A series of steps followed in a regular definite order
- An established way of doing things.
- Developed by Managers with input from staff who do the job
  - Not a Job Description
  - Not a work schedule
Example:

• Policy:
  – We will provide nutritious, tasty meals to all eligible participants.

• Procedure
  – Menus will be developed with the Elders’ Food Committee.
  – Menus will be approved by the Tribal Clinic RD
  – All Foods will be produced using standard recipes.
Procedure Steps

• Procedure: Menus will be written by the Elders’ Food Committee.
  – At their monthly meeting on the first Tuesday of the month, the elders will determine entrees for the coming month.
  – The entrees will use a variety of protein sources, including at least one red meat, one fish, one poultry, and one non-meat meal per week.
  – After the entrees are decided, the committee may choose to assign side dishes where preferred.
  – Menus will be completed by staff using the standard menu format and sent to the tribal dietitian for approval.
Start with Important Issues

• Search the Title VI Book for the word “require” and highlight it
  – This will give you a list of the “required policies”

• Go through the basics:
  – What are we going to do?
  – Who can participate?
  – When will do it?
  – Where will we serve?
  – The “How’s” are the most difficult....
Steps for Development

- Perform an inventory of current Policies & Procedures
- Determine areas deficient in P&P’s
- Create a list of areas requiring P&P’s
- Design a standardized format or template
- Organize policy needs by subject
- Write, edit, review, & put all policy drafts into standard format
- Present for the approval of the managers/supervisors
- Revise & make any necessary changes
- Present & get Tribal Council approval
- Roll out P & P manual and provide training
- Revise as needed and keep updated
Developing your Manual

- Make certain that you have reviewed any tribal policies before you begin
- Incorporate those that apply into your manual
  - Look for policies about office closures, holidays, emergency management.
- Always date policies and include a signature for the bottom of each policy on each page.
- If you receive Tribal Council approval, show that date and signature as well.
Implementation and Training

• Policies and Procedures are WORTHLESS if no one knows that they are in existence.
• Review them with ALL staff so that when “rumors” start, all staff are able to help speak the truth.
• As policies change, make sure to conduct training session so that all staff have the same information
• Information about minor changes could be provided by memo, posted on bulletin boards, or other informal methods.
Ongoing Process

• Review current policies and procedures annually to determine if changes are required
• Procedures (more often than policies) will require revision
• Review policies and procedures with Elder Advisory Council and the Tribal governing body as you need to do so
  – This can help in the long run to make the policies LAW!
SUMMARY

• Policies and procedures actually make your job easier
  
  *KEEP THEM CURRENT*

• Policies and procedures will ensure consistent quality services for your Tribal elders

• Policies and procedures are your day-to-day guide in operating your program

• Policies and procedures will help avoid confusion

• Policies and procedures will help to assure all staff and clients are treated equally
First Figure Out Your Categories

• 1-99 Basic Program Policies
• 100-199 Congregate Meal Policies
• 200-299 Home Delivered Meal Policies
• 300-399 Fiscal Policies
• 400-499 Food Service Policies
• 500-599 Menu Planning Policies
• 600-699 Information and Assistance Policies
• 700-799 Transportation Policies
• 800-899 Emergency Policies
• 1000-1099 Caregiver Policies
Basic Program Policies

- Who gets to eat
- Hours of Operation
- Days
  - Weather closure
- Price—Suggested donation
- Actual cost of the meal for guests
- Reservation system
- Definitions
- Mandatory Reporters
- Release of Liability
- Volunteers
- Telephone use
- Conduct and Behavior of Participants and Guest
- Confidentiality
- Dress code for Participants, guests and staff

- ADVISORY COUNCIL
Congregate Policies

- Daily participant logs
  - Signed?
- Personal Information
- Turn away policy
- Staff meals
- Volunteer meals
- Guest meals
- Caregiver meals
- Special Utensils
- Left over policy
- Take home meals
- Take out meals
- Homemade foods
- Garden Donations
Home Delivered Policies

- Define homebound
- Define Frail
- Home Delivered participant assessment
  - Dr. Orders
  - 2ADL’s
  - 55+
- Where delivered
- Emergency foods
Fiscal Policies

- Recordkeeping
- Purchasing food and supplies
  - Who, how, what
- Petty Cash
- Cash handling
  - Bank Accounts for Nutritic
  - Bank Accounts for Elders
  - Two people always count cash together
- Withdrawals for activities
  - Who decides?
Food Service Policies

- Equipment
  - Servicing
  - Use
  - Cleaning
- Training
- Sanitation and Safety
- Purchasing
- Use of traditional foods
- Roadkill

- Inventory
- FIFO

![Danger Zone Diagram]

- Stuffing, whole poultry, poultry breasts, ground poultry, reheat leftovers
- Meats (medium), egg dishes and ground meats
- Pork or beef steaks, roasts, veal, lamb (medium rare)*
- Hold HOT foods

Refrigerator temperature

Freezer temperature

*Allow three-minute rest time
Menu Policies

• Must meet standards
• Who writes them?
• Who reviews them?
• Can they be changed?
• Using donated foods
• How often will they cycle?
• Adding new foods
Information and Assistance Policies

• Developing a Resource Guide
  – Working with the local AAA
• Keeping track of services
• Reports
• How do elders get help
• Home visits
• Prioritization of requests for help
Transportation Policies

• Regularly scheduled trips
• How to book an appointment for a trip
• Out-of-town trips
  – Who goes?
  – Behavior agreement?
Emergency Policies

• Specific Emergencies
  – Weather
  – Fires
  – Earthquake
  – “Man Down”

• Senior Kitchen Disaster Support
  – Emergency Food Supply available to the program
  – Water supply

• Emergency Meals
Caregiver Policies

• Who is a Caregiver and eligible to receive services?
• How will you provide and keep records for each type of service?