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A GUIDE FOR POLICY DEVELOPMENT



Guide

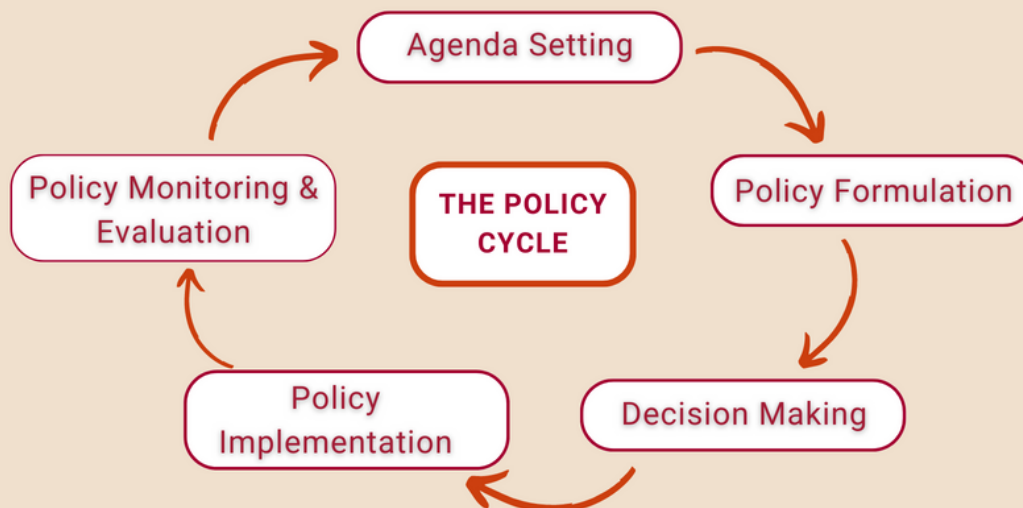
Policy Development

Why You Should Care

Whether you are a small, medium, or large collective, clear policies are crucial for ensuring your organization's values and standards are effectively implemented. Policies underpin the essence of your collective goals, purpose, and impact- ensuring your values are aligned with your actions. Therefore, robust policies require a team and system to be produced and implemented effectively.

Policy development is an **iterative** process that involves frequent revisions and adaptability to achieve long-term success. There are **5 key steps** to creating an effective policy: agenda setting, policy formulation, decision making, implementation, and evaluation. These steps allow policy developers to analyze the policy process by breaking down the policy lifecycle into precise details to minimize risk, enhance equity distribution, and adjust to economic and political feasibility (Goudler and Parry, 2008).

POLICY CYCLE OVERVIEW



Guide

Policy Development

1 Agenda Setting

- a. Determine the problem that needs to be solved and what individuals would be the best fit to support the policy creation for this problem.
- b. Ensure the problem is well understood and the policy solution presented addresses the root causes to the best of your abilities. Subject matter experts in the field should be consulted throughout each stage in the policy cycle. Secondly, determine if there is a 'policy window', aka a social and/or political event that supports your policy goals and how to best align with the policy window.
- c. Brainstorm, research, and determine an appropriate policy goal that addresses the root problem.
 - i. **TIP:** when determining the root of the problem use a Systems Thinking Framework and mind map.
- d. Is there a potential policy window to further support your policy goals and implementation? Plan policy implementation and strategy with policy window if appropriate.

2 Policy Formulation

- a. Policy formulation involves determining the best policy option based on the policy goals and criteria used to assess policy success. The policy team should make revisions, as well as rewrite and hire industry experts to produce a policy that is ready for approval. Policy options may be a tool you use to achieve the policy goal. For example, financial controls act as a policy tool to reach your organization's financial goals and serve your fiduciaries.
- b. Identify what policy options work best to achieve your policy goal.
- c. Develop criteria to evaluate the success of the chosen policy goal and option.
- d. Write policy and send it to relevant stakeholders and experts for feedback and review.
- e. Revise policy to best meet policy goals.

3 Decision Making

- a. The policy team will present the policy goal, options, and implementation plan to decision-makers for approval.
- b. Using the criteria for policy success, determine the best policy option to meet your policy goals.
- c. Obtain approval and create an implementation plan

4 Policy Implementation

- a. The governing body sets the policy implementation strategy in place by informing the relevant stakeholders and providing training to relevant members.
- b. The policy is sent to relevant stakeholders and decision-makers.
- c. Policy training and implementation is executed.

5 Policy Evaluation & Maintenance

- a. A crucial part of the policy cycle is the continuous monitoring and evaluation of the policy. As social, political, and environmental dynamics change, the best policy option to reach the policy goal may also transform and require adaptation.
- b. Set and begin monitoring the policy's success based on the established policy success criteria.
- c. Evaluate the policy based on observed monitoring and make necessary adjustments.

