

## **Outline proposal: Project to streamline and update staff guidance documents and policies**

**Meeting date: MSMTM 17 February 2026**

**Report by: Lynn Balfour, Head of Business Support**

### **1. Purpose of report**

To outline a plan for simplifying and modernising how staff access staff related policies and related information, ensuring guidance is clear, up to date, and easy to find. The new approach also needs to be manageable for a small team responsible for creating, updating, and maintaining policies.

### **2. Recommendations for SMT**

- (i) Read report and have follow up discussion
- (ii) Agree on Workplan
- (iii) Consider whether this report should be published in full

### **3. Report**

#### **Background**

Over time, a number of our staff related policies have become out of date, contain duplication, or are written in a way that is overly complex and difficult for staff to follow.

A significant amount of policy and policy-related content is currently embedded within the Employee Handbook. At nearly 200 pages in length, this makes the document cumbersome to navigate and difficult to maintain. Given the volume of material it contains, sections frequently require updating, meaning there is rarely a single, fully up to date version available for staff to rely upon.

There is also a lack of clarity within some policies regarding roles and responsibilities, which can create ambiguity in interpretation and application. In addition, policies are stored in multiple locations, making them difficult for staff to access and use consistently. In some instances, it is not clearly defined what constitutes formal policy and what does not, leading to uncertainty and the potential for inconsistent application across the organisation.

This creates significant risks for the organisation. Staff may inadvertently fail to follow required procedures, which could result in non compliance with legislation or regulatory requirements, operational errors, inconsistent decision making, and reputational damage. The lack of clarity and accessibility also increases the likelihood of misunderstandings, disputes, or inconsistent treatment of staff.

The number, location and overall complexity of our policy documentation make it extremely challenging to maintain effective governance and ensure documents remain

current. For an organisation of our size, and without a dedicated policy team or role, this approach is neither proportionate nor sustainable.

The current system lacks coherence and control, and we need to overhaul how we manage policies to make the process manageable, clear, and workable particularly for the BST who already carry significant responsibilities across the wider corporate function.

## **Proposals**

### **1. Make the Staff Manual Obsolete**

The current staff manual is lengthy, difficult to keep up to date, and duplicates information held elsewhere. It is proposed that relevant information is extracted and this document is formally retired and no longer used as a source of guidance.

### **2. Create a Short Employee Handbook**

Replace the existing handbook with a concise document that:

- Provides a brief overview of the organisation, its values, and how we work
- Sets out key expectations and high level information for staff
- Signposts staff to where policies and detailed guidance can be found
- Can be used as a key resource for staff induction

### **3. Establish a Central Staff Policy Repository**

Create a single, clearly structured repository for all staff related policies that:

- Acts as the definitive source of current staff related policies
- Is accessible to all staff
- Allows for easier updating, version control, and consistency

### **4. Update Staff Related Policies**

Ensure all staff related policies are accurate, relevant, and reflect current practice, and that measures are in place for them to be regularly reviewed, updated, and maintained.

## **Suggested Workplan**

### **Stage1: Establish the Current Position**

- Undertake a comprehensive review to identify all existing staff-related policies and where they are currently located. This will include policies contained within the Staff Handbook, Staff Manual, and any other locations across the organisation.

- Identify any organisational or externally required policies that fall outside the scope of staff-related policies and separate these from the staff policy review. This will ensure clarity of scope and avoid duplication.

### **Stage 2: Clarify and Rationalise Documentation**

- Extract all policy related content from the Staff Handbook and Staff Manual. Whether whole policies or embedded sections, these will be developed into standalone policy
- Gather the most up to date versions of all staff related policies and establish a definitive, consolidated list. This register will form the foundation of a clear and controlled staff policy framework.

### **Stage 3: Address Gaps and Prioritise Policies**

- Using the consolidated register, identify any gaps where policies are missing but required to support compliance, good governance, and effective staff management.
- Develop a prioritised action plan, ranking policies according to those requiring urgent review and updating and then those requiring development where gaps have been identified

### **Stage 4: Establish Sustainable Governance**

Identify and establish a single, centralised repository for all staff-related policies. This should be easily accessible to all staff, clearly structured and user friendly. governed through version control and review dates

This programme of work should align with the future move to SharePoint (or other document management systems), ensuring that any interim solution allows for a smooth transition.