



Organizational Culture Foundations Creating a Handbook and Intranet

Creating an Organizational Handbook

An [organizational handbook](#) provides an easy-to-access guide outlining the organization's primary policies and procedures. This guide may be utilized in new employee onboarding and should be regularly updated to ensure accuracy. The handbook should not include individual protocols for programs or departments.

Handbook Creation Tips:

- Keep it simple. Avoid using jargon and ensure instructions are clear and concise.
- Keep it updated. When a major change occurs, update the handbook. If no major changes occur over a 12-month period, review the handbook for accuracy at least once per year.
- Accept feedback. Allow users to submit feedback that may help improve the handbook's usability.

What to Include:

- Organization mission, vision, values
- Brief history of the organization
- DEI, anti-harassment, and non-discrimination policy
- Code of conduct
- Dress code
- Attendance and breaks/meal policy
- Communications policy
 - Company phone or other device usage protocol
 - Communications with media
 - Social media posting
- Personnel organizational chart
 - Where applicable, organizational chart for sub-brands and/or organizational projects
- HR forms or procedures
 - Company programs and benefits
 - Holidays, events, or other dates that impact the organization
 - Procedures for formal complaints

- Employment at-will policy
- Work authorization
- Overtime and leaves of absence policies
- Direct deposit information
- Other legal requirements such as FMLA or worker's compensation
- Performance standards and review information
- Performance Improvement Plan (PIP) procedures
- Offboarding procedures
- A statement noting the handbook does not create or act as an employee contract
- Acknowledgment of receipt

Creating an Intranet Network

Intranet is a private communications network created with the intention of sharing important internal information such as the employee handbook, pay or performance information, HR documents and forms, important dates, and more. Intranet portals can be created in a variety of ways and may vary based on your organization's existing setup and website hosting abilities.

- [How To Create An Intranet: A Step By Step Beginner's Guide](#) - My Hub Intranet
- [How to Make an Intranet: 8 Steps \(with Pictures\)](#) - WikiHow
- [How to Set Up a WordPress Intranet: A Comprehensive Guide](#) - Hostinger
- [Sharing and Publishing New Google Sites](#) - Steegle
- [How to Build a Company Intranet on Google Sites](#) - Better Cloud

Note: If your organization has a centralized online HR and communications platform such as Paycor or BambooHR that house internal documents, an official Intranet page may be redundant and unnecessary.

Onboarding and Training Tracking

Consider digitizing all staff and volunteer resources and basic onboarding protocols and converting them into a trackable onboarding course or outlined format. This will ensure all relevant personnel have completed onboarding, received the organization's handbook and basic resources, and have a larger process to track assignments or continued training.

Creating a tracking process for staff and volunteer training

- Before the creation of a new training tracking process, discuss options with leadership and Human Resources at your organization. If available, this may be an opportunity for collaboration within an existing employee management or project management software. Confirm whether volunteers may also be able to use this software if volunteer training is also required.

- If an existing software solution is not available, consider who may need access to the tracking information and how the organization currently tracks training progress such as spreadsheets, documents, forms, etc.
- Identify the person(s) responsible for the management and distribution of training. How do they currently track training efforts? Is this process working, or should it be updated?
 - Who needs access to monitor training progress files? How do they currently monitor progress? Is this process working, or should it be updated?
 - Should the training progress files be digital or physical documents?
 - Is there a budget to purchase a Learning Management System (LMS) for the organization to track training progress? *Note: An LMS can both distribute training materials and track progress.*
- Consider if there are different processes in place for employee versus volunteer training efforts. Is there an opportunity to combine the processes? If not, ensure both are updated when changes are made.
- If creating a new tracking system, consider including the following items:
 - First and last name (Trainee)
 - Email (Trainee)
 - Title/Role (Trainee)
 - Direct supervisor
 - Type of training assigned
 - Training required? Y/N
 - Date assigned
 - Assigned by or required by (Ex: Supervisor assignment, HR requirement, Grant fulfillment requirement)
 - Due date
 - Scheduled check-in date
 - Responsible for check-in (Person)
 - Date of completion
 - Notes
- If there is an interest in tracking not only the status and progress of training, but also time spent, consider adding a metric for the length of time the training will take. You may later use this in reports to calculate time spent as an organization, or individuals, to complete assigned training assignments.
- Consider adding training to the onboarding process for all new personnel
- Consider integrating collection of training process feedback for continuous improvement.

Sample Solutions (Spreadsheet Based)

- [Simplified Tracking Sheet for Training Assignments](#) - Suitable for any size group or training assignments, but does not elaborate on details or follow-up procedure.
- [Tracking Sheet for Training Assignments I](#) - Suitable for small personnel groups and limited training assignments.

- [Tracking Sheet for Training Assignments II](#) - Suitable for larger groups and training assignments if software is not available. As resources allow, it may be beneficial to consider non-spreadsheet tracking options for ease.

Learning Management Systems (LMS)

Learning management systems vary greatly when it comes to cost, capacity, simplicity of use, and best fit for organizational goals. We highly recommend your organization take the time to complete individual research on the solution that makes the most sense for your organizational needs. To get you started, here is a short list of existing LMS systems you may consider:

- Cypher Learning LMS
- TalentLMS
- Absorb
- iSpring
- Docebo
- D2L Brightspace LMS
- Blackboard Learn LMS
- Canvas LMS
- Moodle LMS
- Adobe Learning Manager