



Policies establish clear, consistent rules for how SRM is used across the Master Entity and its participating agencies. This guide explains why policies matter and what belongs in one. The accompanying Policy Templates show the full section-by-section structure in practice.

Why Policies Matter

Policies provide clarity and consistency—everyone operates under the same rules, which reduces confusion and ensures equitable treatment. They establish accountability by assigning responsibility and defining consequences for non-compliance, and they reduce risk by setting best practices and prohibited conduct in writing.

They also shorten the learning curve for new employees, who get a written reference instead of relying on tribal knowledge, and they preserve institutional knowledge so operations continue smoothly when personnel change.

What a Policy Should Contain

A complete policy covers its purpose and scope, roles and responsibilities, eligibility and access, required procedures, data use and confidentiality, prohibited conduct, training requirements, and how violations are handled. It should also state how and when it will be reviewed. Not every section applies to every policy, but this covers the common needs—the Policy Template applies each of these to SRM specifically.

Writing a Good Policy

Good policies use clear, plain language and define any necessary technical terms. They're developed with input from the people they affect, so requirements reflect how work actually happens rather than how it's assumed to happen.

Maintaining a Policy

A policy is only as good as its upkeep. Policies should be reviewed annually or as circumstances change, and paired with training—a policy no one was told about can't be followed. Leadership sign-off establishes authority, and a version number and date prevent confusion between revisions.

Policies aren't administrative overhead—they're the framework that keeps operations clear, accountable, and consistent through personnel and operational change.

Related Documents & Review

This guide complements the Policy Template, which applies each of these elements to a specific SRM policy. The Workgroup is responsible for recommending policy updates per its governance responsibilities; the Master Entity gives final approval. This guide should be reviewed annually or whenever policy needs change significantly.