

Processes & Procedures

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A stronger Illinois begins at home

The Manual

My Task

Importance

“A nonprofit policies and procedures manual is a document that outlines the policies and procedures that govern the operations and activities of a nonprofit organization.”

Develop Processes and Procedure Manuals:

- **Housing Counseling Training Programs**
- **Compliance (Requisitions)**
- **HUD Performance Reviews**

The manuals help to **maintain the quality of work** being done and **improve efficiency** in times of:

- **Sick leave**
- **Maternity/paternity leave**
- **Staff transitions**

Where to Begin

Discuss the program you are writing the manual about and the **staff member's main objectives and tasks.**

- General overview of program
- Daily & quarterly tasks
- Documents & systems regularly used

Shadow the staff member as they execute their duties.

During the shadowing:

- Put yourself in their role
- Ask any questions that arise
- Work through and assist as much as possible

5 Points of Importance

1. Accessible

This document should be **sharable** and **clear**.

- i. Open access Google Doc
 - Can limit who has edit access
 - Add links to websites and documents
- ii. Use clear, straight to the point language
 - Add screenshots to aid descriptions
 - Have someone review for clarity
 - Color code when appropriate

2. Organized

After you've taken notes, **create an outline.**

- i. This will help to create a narrative of the program in your mind.
 - Divide your notes into sections such as First Steps, Admin, Follow-Up, etc.
 - Then, expand upon your notes.
- ii. Include a Table of Contents in the beginning, as well as helpful checklists.
- iii. Add hyperlinks wherever useful.
 - Helps you quickly jump around the document to the section you're looking for.

3. Up-to-Date

The Processes & Procedures Manual should be a **LIVE document**.

- i. Update the document as any systems or procedures change.
 - On cover page, add "Last edited: xx/xx/xxxx".
- ii. Include any important dates or deadlines.
 - Ex. Reports are due on the 5th of every month.

4. Thorough

Write the manual as if you were **teaching someone completely new** to the agency and the industry.

- i. Include step-by-step explanations of key processes.
 - This includes tracking spreadsheets, websites or databases (CMS), creating materials, etc.

This will help the agency not only in times of staff transitions, but also if you are out of the office and someone needs to cover those tasks.

5. Reflect You!

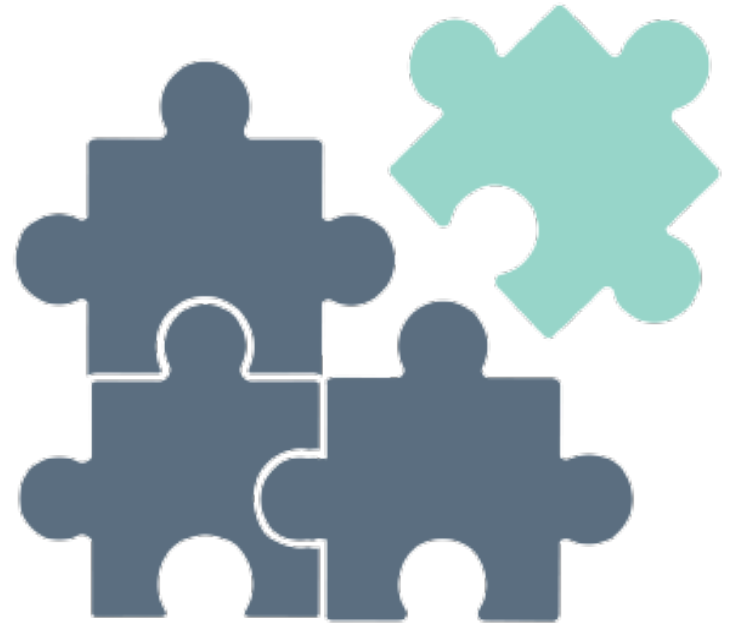
The Processes & Procedures Manual should **document** all of **the important work you do**.

- i. Share your knowledge!
 - Identify tips that you find useful.
 - Explain the importance of certain procedures.
- ii. The manual will allow your agency to maintain the quality of work you have provided.

“Spelling out exactly how things need to be done promotes efficiency and security for each aspect of your organization.”

Processes & Procedure manuals create comprehensive guides to the various roles in your organization.

It will create not only smoother staff transitions and trainings, but also identify the importance of the daily work that you do.



THANK YOU



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