

Presenters



Roseanna Galindo, CAVS, with 30+ years in volunteer leadership, established Periscope BPA to bolster data communication among business professionals. Formerly a Director of Volunteer Services, her influence in volunteer engagement is far reaching. Hailing from CSU, Chico, her work on the Volunteer Satisfaction Index, “VSI,” has garnered international recognition, illuminating the intricacies of the volunteer experience. An advocate for data literacy, Roseanna guides leaders in the essentials of data storytelling. Her blog, "Periscope Insider" on PeriscopeBPA, intersects communication and data, solidifying her role as a champion for data literacy, the human experience in healthcare, and volunteer leaders everywhere.



Todd McMullin graduated in non-profit management and has 25 years experience as a technology consultant for community organizations. He is the co-founder of a United Way chapter, a local Volunteer Center, Samaritan Technologies, The Disaster Help Network, The Congress of Volunteer Association Administrators and the Association of Leaders in Volunteer Engagement (AL!VE).



VSys Voices:

Standard Operating Procedures (SOPs)

Nuts & Bolts!



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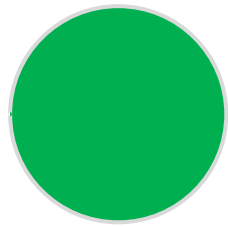
Our Journey Today



Target audience for today's webinar

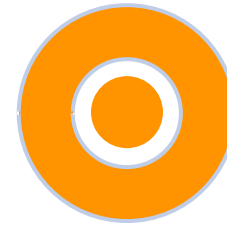


SKILL LEVEL



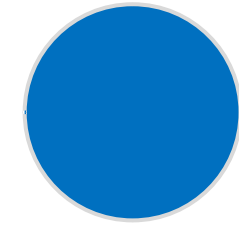
Minimal Knowledge

Looking for some basic information, key principles and “how-to’s” on the subject.



Working Knowledge

Integrated practices and moving beyond basic concepts. Looking for breadth and depth on a topic



Authoritative Knowledge

Looking for advanced knowledge, integration and concepts that are innovative and cutting edge.



Credit Where Credit...



<https://www.aspcapro.org/resource/creating-sops>



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Do's and Don'ts of SOPs

DO NOT

- Yawn!
- Panic
- Underestimate

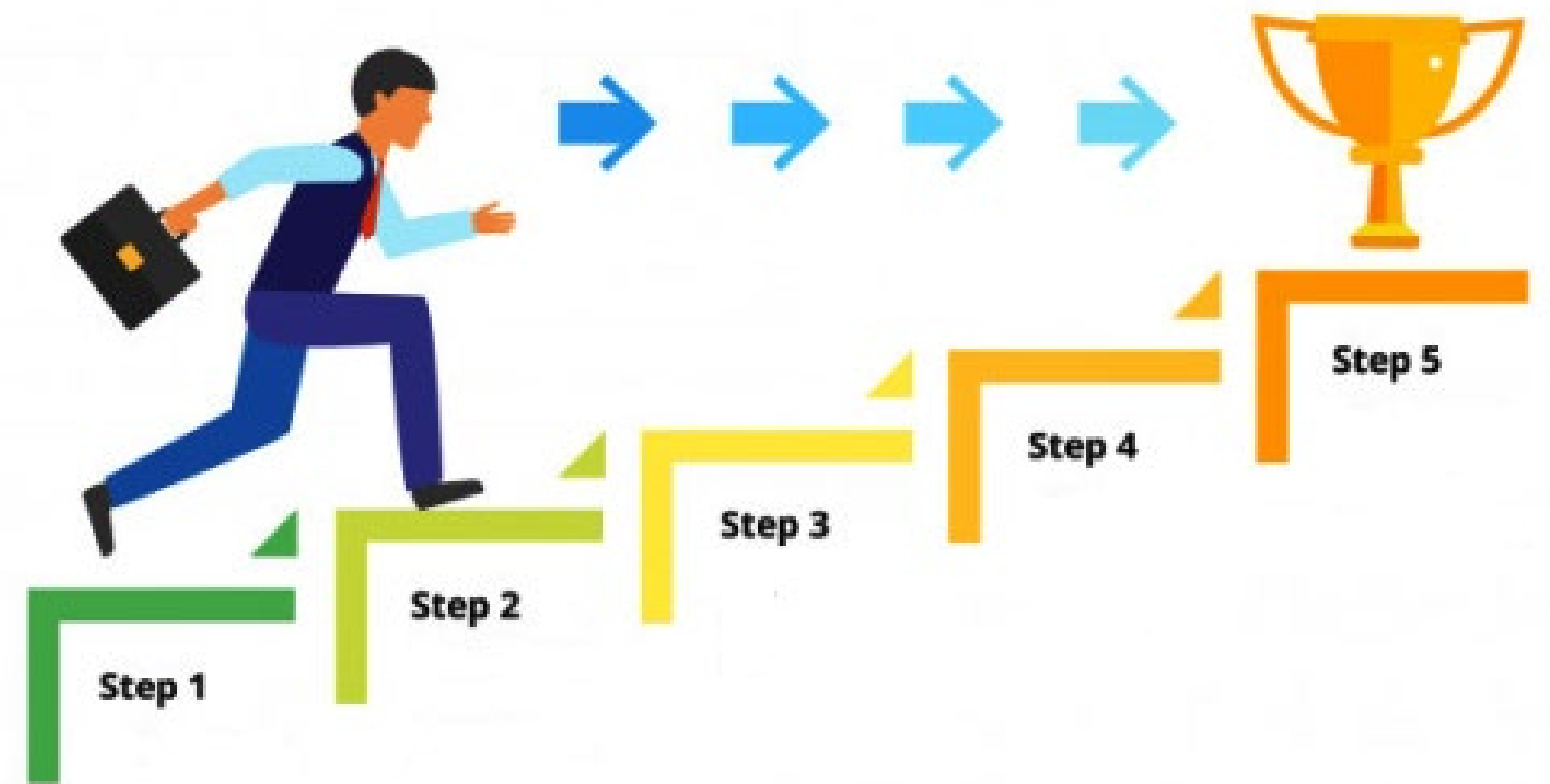


DO

- Plan Your Attack!
- Socialize It
- Execute

What is a SOP?

- A particular way of accomplishing something
- A series of steps followed in a definite regular order



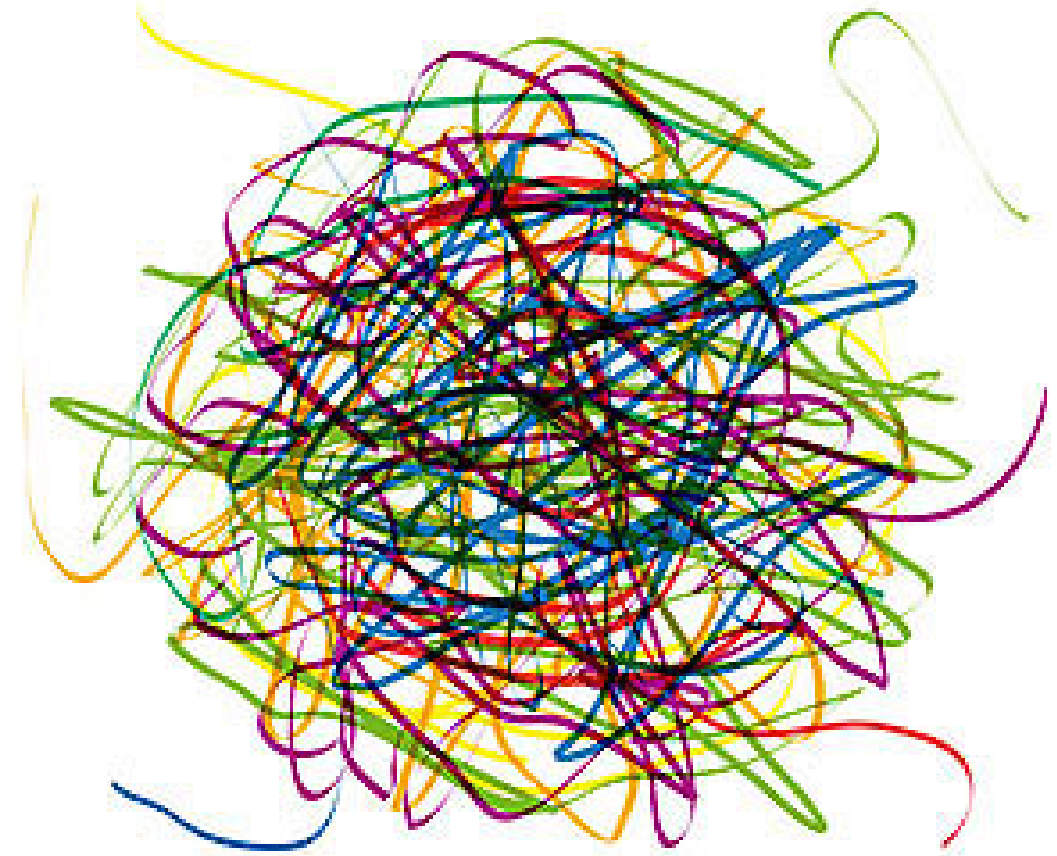
a PROCEDURE, not a POLICY.
It's "How," not "What."

Who Benefits?

- **Supervisors:** Quality control & accountability
- **Staff:** Understand expectations
- **Clients:** Predictability > better experiences
- **Volunteers:** Clarifies roles & task



Without SOPs...



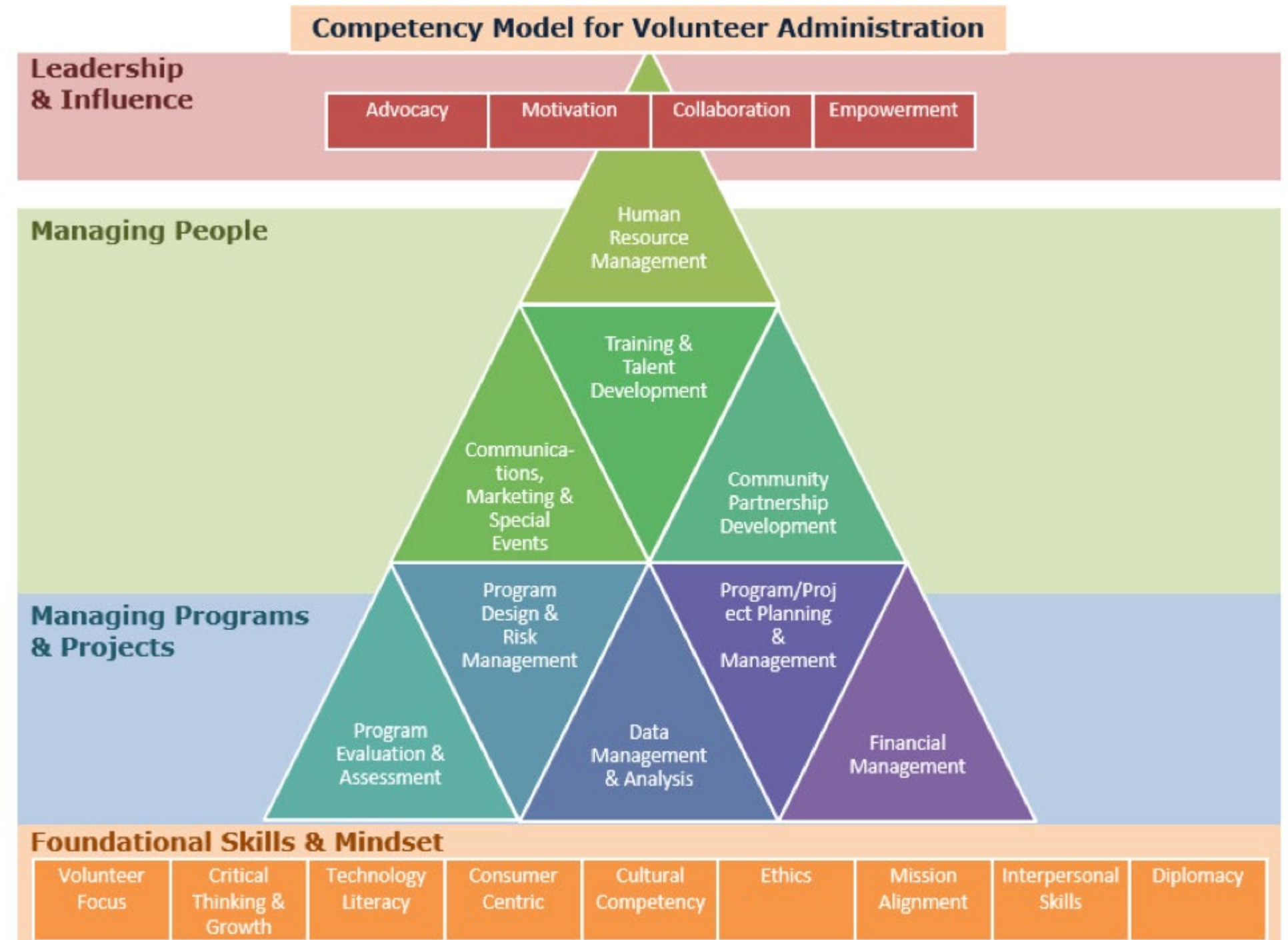
SOPs are NOT

- Personnel / HR *Policies*
- Risk Management *Policies*
- Financial *Policies*



However, they ARE for...

- Intake & Onboarding
- References
- Interviews
- Orientation
- Training
- Performance Evaluation
- Routine Operations



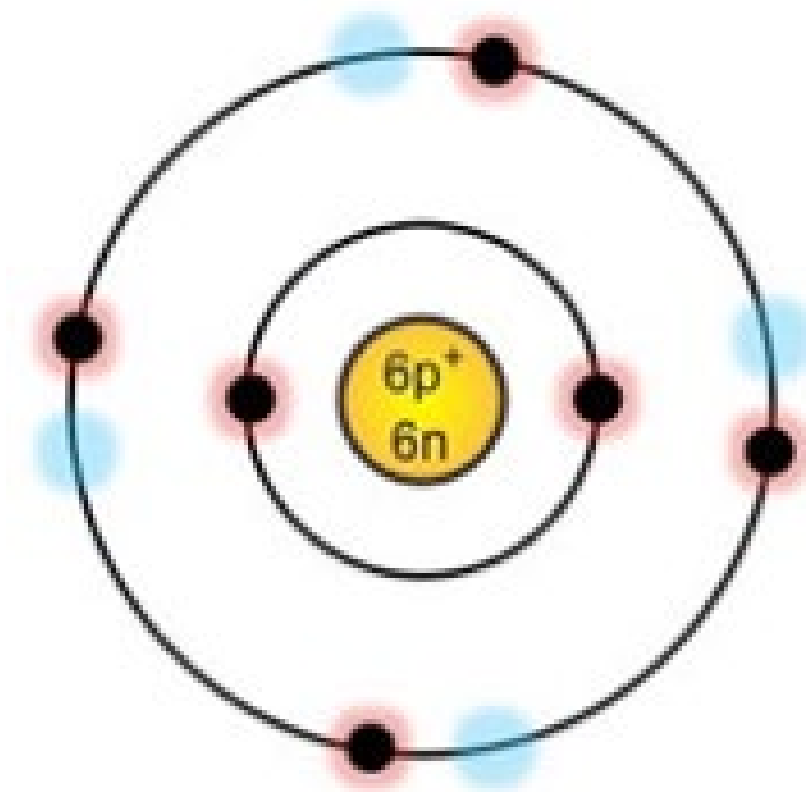
What do you do with a SOP?

- Ensure it **complies** with policies & standards
- **Write It Down!**
- **Socialize** (gain input & modify as needed)



Common Elements

1. **What** is to be done?
2. **Who** does the work?
3. **When** is work completed?
4. **Step-by-step** Instructions
5. **Remedies & Remediations**



When Developing SOPs...

ASK

1. Are tasks accurately described?
2. Is supervision clearly defined?
3. Are special situations handled?
(e.g. working with minors, or \$\$).
4. Are timeframes & expectations realistic?

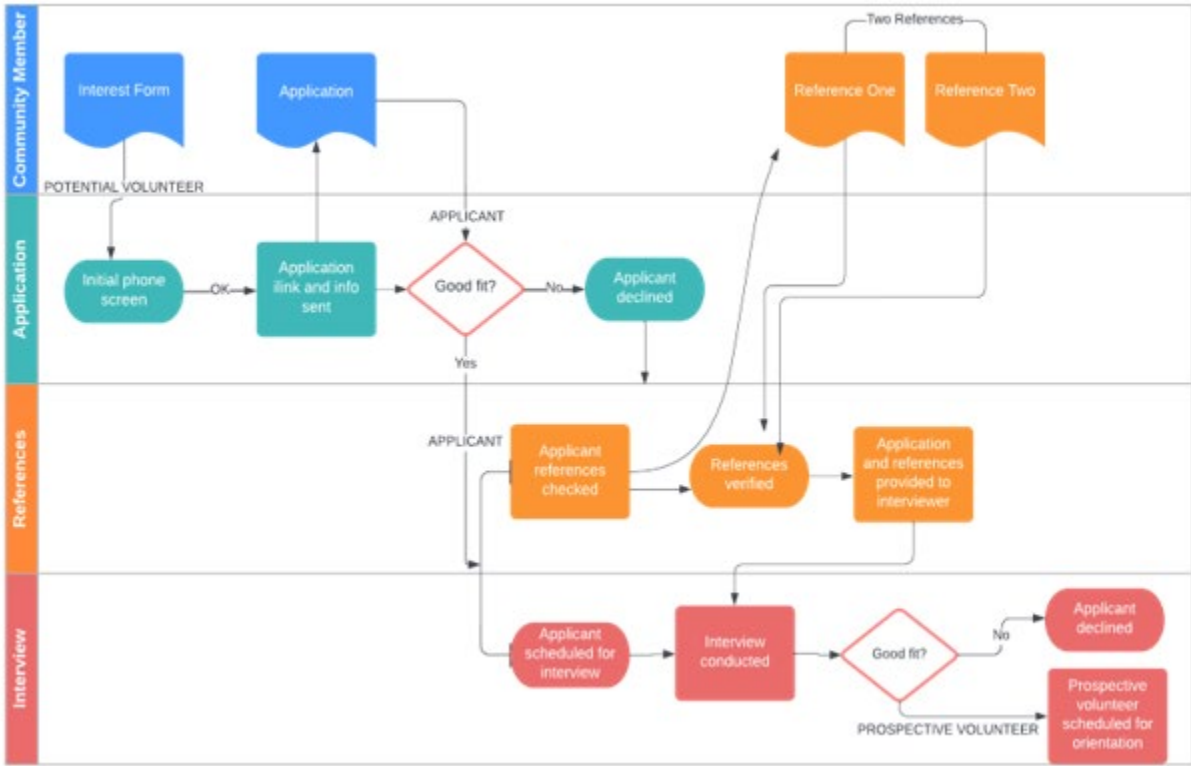


Let's Look: Core



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Free download available at www.PeriscopeBPA.com/Toolbox



Let's Look: Large Operations



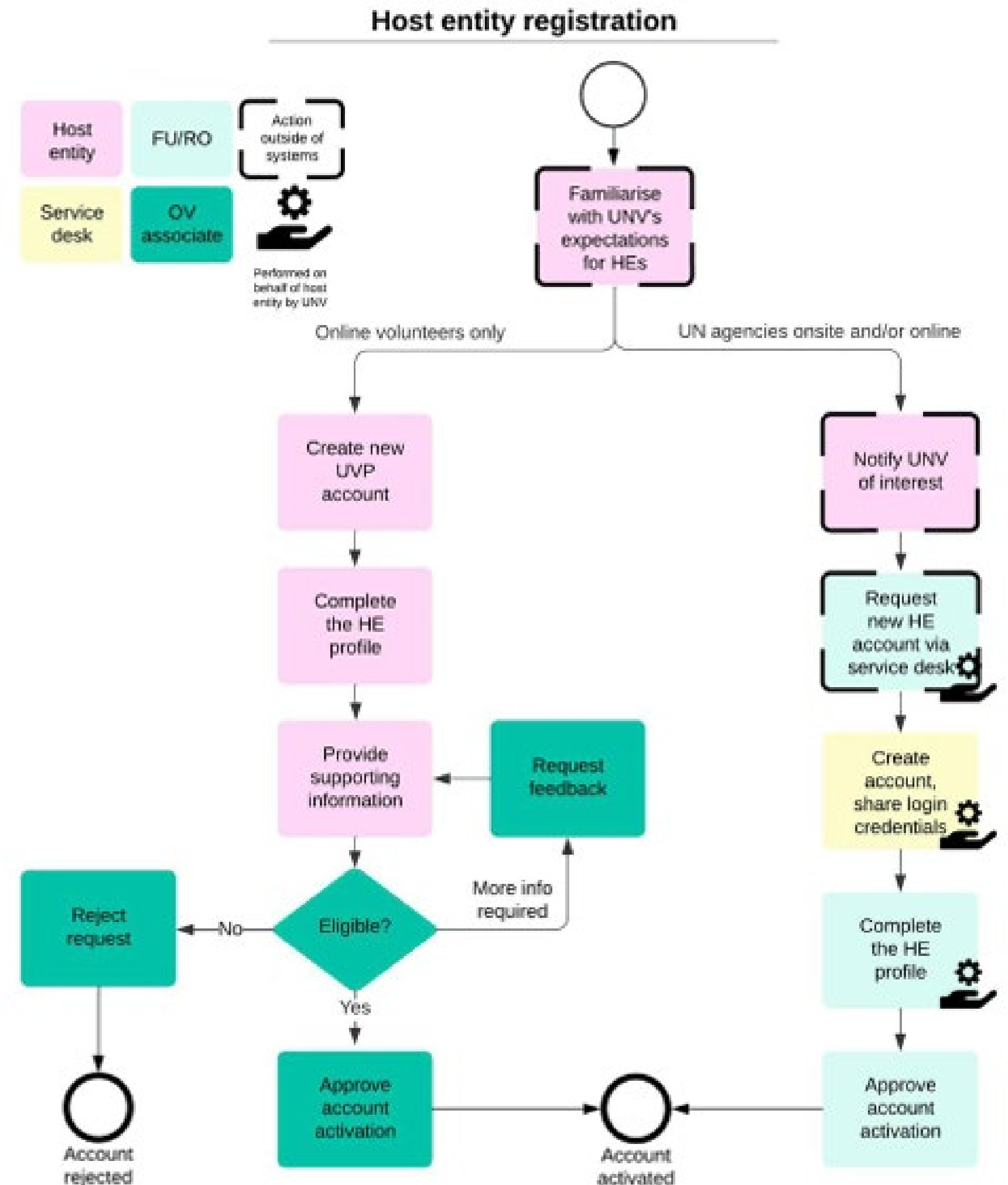
UN VOLUNTEER MANAGEMENT
STANDARD OPERATING PROCEDURES




Let's Look: Large Operations

Contents

Abbreviations used in this document	
Glossary of terms	
Colour coding used in this document	
Related and useful links	
Guide to using the SOP template	
Standard Operating Procedures	
Host Entity registration and approval	
Create a new host entity account	
Complete a host entity profile	
Invite a new user to a host entity account	
Reset host entity account password (online host entities only)	
Candidate registration and application	
Draft and Publish an Onsite Description of Assignment	
Candidate Identification and Selection	
Candidate Pre-assignment	
Candidate pre-assignment tasks	
Finalise pre-assignment	
Volunteer and dependant onboarding	



Let's Look: Large Operations

#	Responsible role	Process step	Description	Documents or guides	System	Comments
1	Here you can see the role responsible for taking the action(s)	This is the name of the step for reference	This describes the actions to be taken by the person responsible.	This contains links to related information such as system guides, policy documents or other helpful material	The system(s) where the actions are performed	Any other information relevant to this step.
Boxes like this show important notes. Sometimes it will link to a separate SOP that must be completed before proceeding with the next step.						
2		 Indicates a check or control point				

Deviation to the standard procedure Indented tables like this show that the steps are for certain situations only as described in this box						
a						
b						

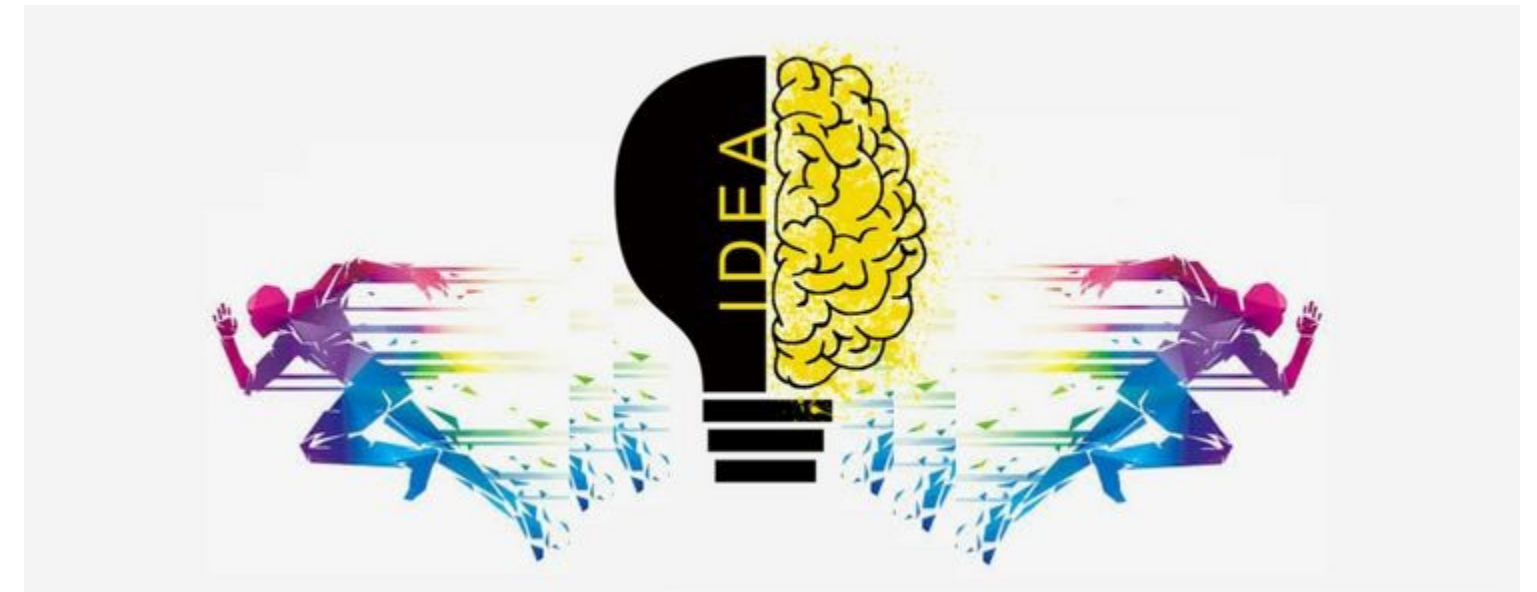
Deviation to the standard procedure						
a			Coloured rows or boxes indicate that it applies only to a certain host entity, volunteer category or other unique identifier. In this case, the orange colour indicates the step applies to fully funded assignments only.			See page 4 for the list of colours used.



Ideas to Action: Starting Out



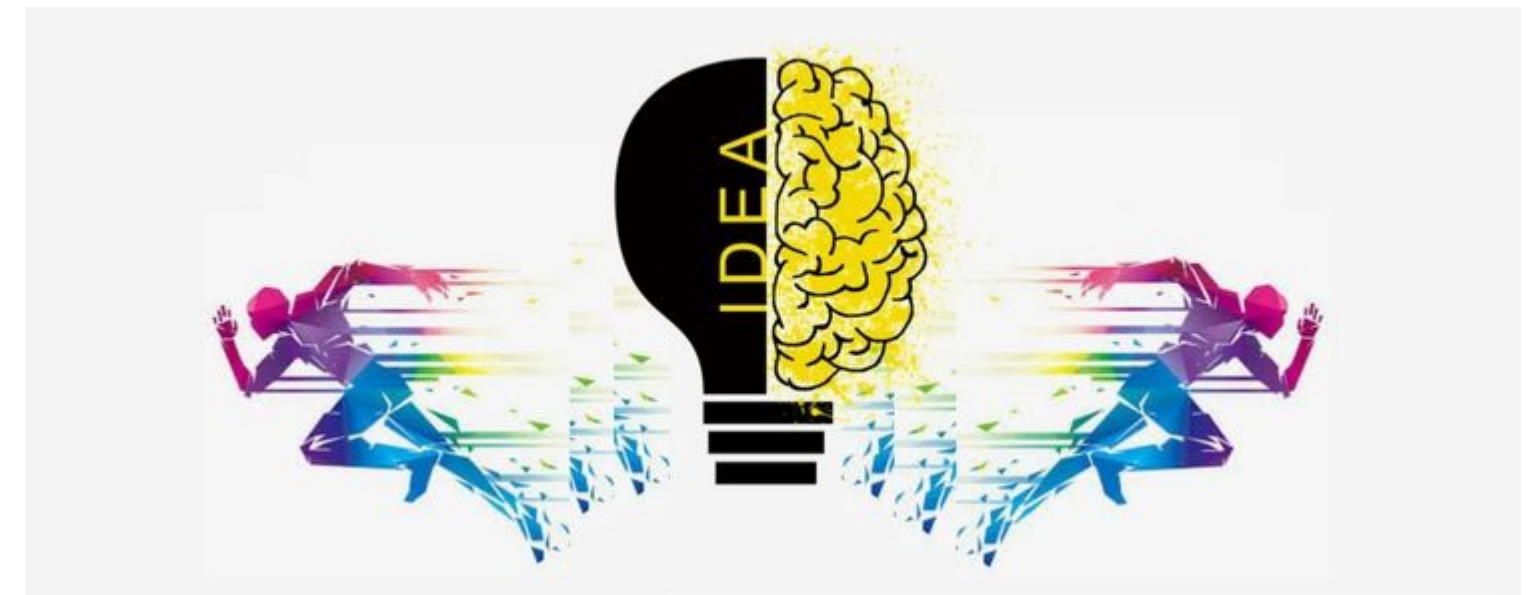
1. Engage internal team:
 - “What procedures would help?”
 - “Where are the gaps?”
2. Verify policy is being followed
3. Draft & distribute
4. Socialize w/ all Stakeholders & Revise



Ideas to Action: Revisiting

Revisiting:

1. Prioritize which procedures to review
2. Call a team meeting to discuss
3. Get stakeholders involved in review of each procedure.
4. Create schedule for future reviewing



Wrap Up...



And Also...

1. Examples
2. Templates
3. Next Steps
4. Fun Presentation!



More Resources

- **ASPCA:** <https://www.aspcapro.org/resource/creating-sops>
- **United Nations:** <https://explore.unv.org/sop>
- **Periscope Business Process Analysis:** [Volunteer Program Operations Manual Template \(.docx\)](#)



Open Discussion & Questions



Thank you for joining us!

