

Developing a Procedures Manual

Overview

One of the most expensive and time-consuming tasks faced by organizations today is training. After an employee's basic training is complete, however, they will still encounter situations not covered during their training. Providing the tools to assist employees with many of those decisions is essential to maintaining higher levels of efficiency and morale. Yes, morale is affected when employees don't have the information needed to do their jobs. Every organization needs to develop a manual to provide managers and their staff with a systematic and consistent approach to implementing procedures and work routines.

It is essential that you make some form of documentation available to your employees. You can write your own procedures manual, or you can get our help

Clients often ask for assistance with database clean-up because of bad coding and data entry methods used by their predecessors. This happens because when a data-entry person is unsure of your methods, they sometimes take creative license, either to save time or to avoid having to ask questions. This method can, and most often does, result in a less than efficient database.

A properly developed manual will:

Reduce Training Time

Once a new employee has attended training classes, your procedures manual will be a functional guide for establishing guidelines for data entry and management. It will help prevent difficulties in performing daily duties due to lack of understanding or inconsistent methods.

Increase Productivity

Procedures documentation provides something in writing to which employees may refer when someone is absent, or when you need to temporarily fill a position. Documented procedures aid employee decision-making with a handy, authoritative source for answering questions. Well-developed and documented manuals ensure compliance with regulatory agencies.

Ensure Consistent Data

When every task has clear standards, management can rely on consistent, accurate results when running reports. We all know that bad data entry leads to bad reports.

Map Out a Plan

All successful projects begin with a good plan. You may need to assemble a team for portions of this project. There should be a project leader, who will be responsible for coordinating the project. The project leader should be involved in all aspects of planning and producing the procedures manual. Developing a plan involves:

- 1) Setting a timeline for the project
- 2) Analyzing the coding use report
- 3) Scheduling one or more meetings to complete the questions document and discuss coding structure
- 4) Determining who should edit/produce the procedures manual

Executing the Plan

We've broken the task down into three steps. Before beginning, you need to take a good, hard look at the codes in your database. Some database cleanup issues may be uncovered during this process.

Coded fields are not the only items to be concerned with. You need to determine if inappropriate information is being stored in name, address and date fields. Many times multiple fields are used to store similar information. This leads to data inconsistencies. If you find widespread inconsistencies the methods for updating your data could encompass global replacements, SQL statements, manual data entry, or by contracting with your software provider.

Questions Document

You begin with answering some specific questions relating to the day-to-day operations of a typical non-profit organization. These questions may be of assistance during the evaluation of your database, but they will primarily serve as a guide in developing your procedures manual.

It may take a series of discussions involving multiple staff members to get all the answers compiled. Examples:

PLANNING: PROCEDURAL QUESTIONS

Donor/Prospect Accounts

1. Who has rights to add, edit and delete accounts?

2. Who has rights to add, edit and delete codes?

3. Where are your Codes documents?

4. Who is responsible for maintaining the codes documents? How often are the documents reviewed?

5. What are the standards for the default salutation?

6. What other "custom" salutations should be added for accounts?

7. What are the standards for the default addressee?

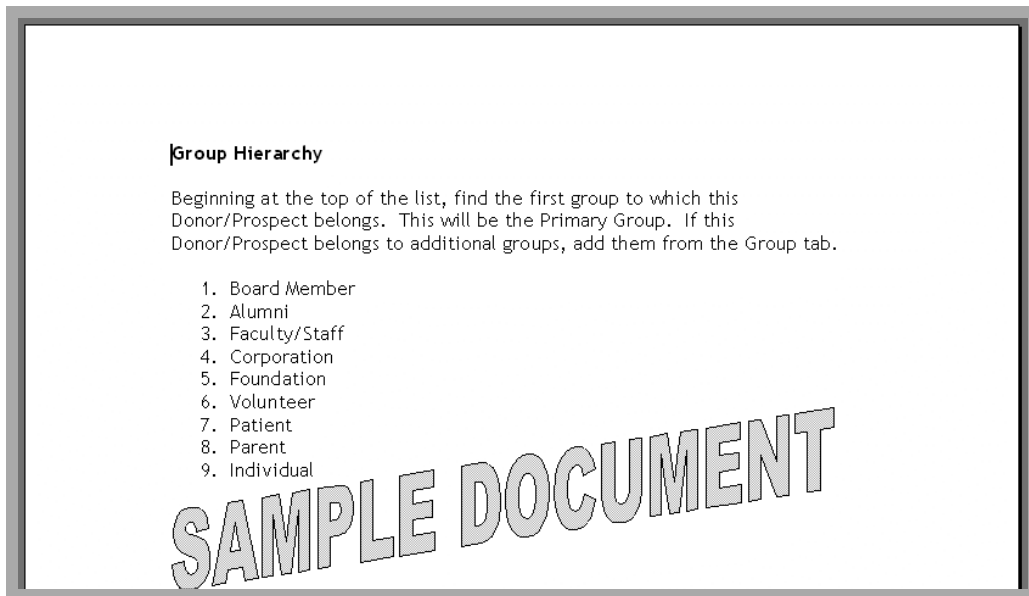
8. Are abbreviations for Street, Road, Avenue, etc., allowed?

9. When is a spouse record added to an existing account vs. adding a separate Donor/Prospect account for the spouse?

Sample Documents

The next step in preparing to customize your procedures manual is to compile reference documentation for your users. These documents must be customized to define the codes and/or terms used by your organization, which can then be linked back to your procedures manual. Some of these documents may already be on file at your office.

Within the procedures manual, there will be hyperlinks to documentation, such as the document below. One click on the hyperlink will take employees to the document containing the information they need.



Assigning the Task

Finally, once you've completed the questions, examined your use of codes, and put together any supporting documentation, you are ready to assign the task of customizing the manual. The "author" of your procedures manual doesn't have to be the next Hemingway, but it is imperative that the person who is assigned this task has solid grammar, spelling and typing skills.

Conclusion

The Procedures manual is not meant to take the place of training in use of the program. It should offer specific guidelines for data entry. In addition to Online Help, technical support is available for specific questions related to using the program.

Make the manual YOURS. Understand that this is a template to help you get started. Don't turn your procedures manual into a printed document that simply gathers dust on a shelf. Make it available to your users online for fast and easy access. Printing and distributing hard copies is strongly discouraged, since the real value of the documentation lies in up-to-date procedures, codes documents, etc. It is desirable to keep the file on a server that is accessible to all employees who work with the software.

We recommend not including screen shots in the procedures manual. As the program changes and grows, the screens sometimes change. New screens are sometimes added. Depending on the amount of time you will invest in future maintenance of this manual, you may decide that you want to include screen shots. Additional software would be required to do this.

Plan to review your procedures on an annual basis. When new procedures are added or existing procedures are changed, those changes must be documented. If the document is not kept up-to-date, employees will lose confidence in it.

One more tip: you may want to consider adding links to pertinent web sites or other documents within the Procedures manual. Anything that will aid your employees in the performance of their duties is certainly appropriate here. If you use accounting software, you may also want to include accounting procedures in the manual, if you don't already have an accounting procedures manual.