RRHO Video Transcript

STANDARD OPERATING PROCEDURES

Imagine that you work for an organization that licenses nurses and midwives. A new colleague asks you how nursing licenses get renewed each year. You could take the time to explain this process to her in detail. But if written guidance is already in place, time and resources could be saved. Documents covering this type of information are known as standard operating procedures, or SOPs.

SOPs, often kept in a reference document called an SOP manual, are written, step-by-step instructions that describe in detail how to perform an activity. They outline the tasks to be performed, how they are best completed, and by whom. Having SOPs available at your workplace means that employees don't need to rely on their memories or guess as to how to perform a task. All departments of your organization should have SOPs in place, including operations, programs, finance and administration, and human resources.

One of the most important benefits of using SOPs in your workplace is that they help ensure consistency in the way a staff member carries out a task. With comprehensive and clearly-written SOPs, no matter who is working on a task—whether experienced or newly hired—tasks are performed correctly. And the more consistent a process is from person to person, the lower the chance that problems will arise or errors will occur. This is important because all organizations experience turnover when employees resign or retire, causing unwritten information and skills to disappear from the team. Further, organizations can be reorganized or restructured, or new regulations may require them to revise their processes. By having your processes documented in an SOP manual, it is easier for your organization to operate as usual despite changes.

The use of SOPs enhance accountability among staff since they know what is expected of them. They can consult the SOP manual when they don't remember what they learned when they were first hired or trained.

SOPs save time and money. Having SOPs in place streamlines processes so employees can accomplish more in less time, with less confusion and fewer mistakes.

For example, an organization that validates foreign licensure for nurses and midwives can benefit from SOPs that help the staff progress through the validation process in a standardized way. These procedures could include a listing of the legal prerequisites for validation, how to complete the required forms, and whose signatures are needed.

Similarly, a college or training institution can benefit from SOPs that detail procedures for:

- the procurement of classroom materials and computers
- the hiring and onboarding of new trainers or teachers
- the creation and responsibilities of the governing board
- disciplinary actions and dismissal, and
- guidelines on curriculum development and training standards.

So how do you start creating an SOP manual? Planning and preparation are required first. Before you begin, remember that:

- SOPs should be simply worded, detailed, and logically laid out. They should be concise and easy to understand, with easy-to-follow action steps.
- The manual needs to be well organized with the same template used consistently for each procedure.

When creating your own standard operating procedure manual:

- First, plan the manual development process
- Decide on a format and template. Which elements are essential? Will it include checklists, flow charts, or other tools, or simply consist of text?
- Next, develop a list of your organization's commonly used processes and procedures that could benefit from being written down.
- Include your employees in developing this list. They probably know best which tasks should be included and during which steps errors commonly occur.

Next, develop the content. Write or gather the content and insert it into the selected template. Again, the workers who actually perform the tasks regularly are the ones who know in detail what steps are required. Include them in the development process or, at the least, have them review and comment on the drafts. And finally, use the document and revise it regularly. In order for the manual to remain useful, you must keep it up-to-date. Determine who will be responsible for this task and how often it will be done. Also decide how the manual will be made easily accessible to all employees who need it. Where will written copies be posted or stored? Will it also be available online?

Use the same template for every procedure in the manual to enhance consistency. The introductory information at the beginning of each procedure might include:

- The title and date the procedure was created, approved, and/or revised
- The purpose of the procedure
- The person responsible
- Definitions of key terms and acronyms, and
- Supplementary materials and documents needed.

The body of the SOP then consists of the step-by-step "how to" guidance, which may include job aids with detailed instructions for how to perform a task, as well as any required forms and how they are to be completed. When writing this guidance:

- Begin each step with an "action" verb such as "conduct," "write," or "review." Make sure each step is distinct and each decision point is clear.
- The "flow" of a procedure should move forward over time, with the initial steps first, followed chronologically by each subsequent step. Flow diagrams and other graphics might be useful, for instance, those that document data flow.

Remember, SOPs contribute to a well-performing workplace. They help ensure that you have a structured system, with operational processes in place and employees who know what they are supposed to be doing.

The use of clearly written and formatted SOPs can:

- improve workplace consistency, productivity, and quality
- save time and reduce errors
- reduce training needs
- enable the delegation of work duties, and
- empower employees.

The time taken to create SOPs is well spent when you consider the cost of not having them in place!