

Policy & SOP Workflow

Finance & Operations Director

- On the 15th of the previous month, emails 1-3 Policies/SOPs & Forms to Directors for review
- Documents will be identified as new or existing; if existing, changes will be identified

Strategic Leadership Team

- Review provided policies, procedures and forms at the Strategic Leadership Team meeting on the 1st Monday of each month
- Provide any comments, corrections, or other feedback to the Finance & Operations Director by 5pm on the Friday immediately following this meeting

Finance & Operations Director

- On the Wednesday prior, to the 3rd Monday of each month policies, procedures and forms will be emailed to members of the Organizational Leadership Team
- Documents will be identified as new or existing; if existing, changes will be identified

Organizational Leadership Team

- Members will review documents with their teams
- Suggested edits for consideration by Strategic Leadership will be provided to the Finance & Operations Director by 5pm on Friday immediately following this meeting

Strategic Leadership Team

- On the 1st Monday of the following month, approve and adopt changes for policies and procedures reviewed the previous month

Finance & Operations Director

- By the Friday immediately following the 1st Monday meeting, distribute documents with final edits and any needed explanation to Organizational Leadership.
- After the Organizational Leadership Meeting on the 1st Monday, distribute to all staff.
- Email document to Communications and Outreach team for addition to intranet

Organizational Leadership Team

- Managers review updated policies/procedures/SOPs with staff and provide document acknowledgment in Paycom as part of supervision.

Community Engagement & Development Director

- Upload documents to the intranet