

Developing Procedures: Tips and Tools

Procedures outline the specific steps and clear instructions for how policy and programming is implemented. While this is also a grant requirement, it provides invaluable continuity and clarity for staff. Procedures ensure that policies are implemented as objectively and consistently as possible. They also provide direction for onboarding new staff, stability during times of transition, and consistency for activities that may not happen in day-to-day operations.

Procedures should be developed for grant compliance issues (how is eligibility determined and documented, how is the selection process conducted, how are outcomes measured, verified and recorded, etc.) as well as for daily operations (how is attendance tracked, what is the process of awarding stipend payments and/or bonuses, how is safety and program progression maintained and reviewed, etc.).

When developing a procedure, the goal is to outline each of the steps in the process.

Your procedures should spell out:

- Why is the procedure important and/or what is the intended outcome?
- How is the process done, step-by-step?
- Which staff members are involved in the process?
- What does each staff do?
- When does the staff do this?
- What is the participant expected to do?
- Where (if relevant) does the activity occur?

Tips for Writing a Strong Procedure

- ☒ Include detailed steps for the full process
- ☒ Be as concise and clear as possible – you need people to read, understand and remember it in its entirety
- ☒ Include links to supporting documents

Example Procedure

PROCEDURE FOR: Recruitment and Selection Process

ASSOCIATED POLICY: Applicants must meet the following eligibility requirements for the AnyTown YouthBuild program:

- Must be between the ages of 16-24 during their period of programming. Applicants must turn 16 prior to the first day of enrollment, and must be no more than 24 years of age on the day of enrollment.
- In general, members must have:
 - Dropped out of high school, and not have obtained a High School Diploma or GED; or dropped out of school and subsequently re-enrolled.
 - One experience, and be able to document, one of the following barriers: low-income household, history of involvement in the criminal justice system, history of being in foster care, history of or current parent incarceration, a disability, or a migrant youth
- In exception for applicants not meeting the general requirements, no more than 25% of members must meet one of the following:
 - Basic skills deficiency or referred by a local secondary school for the purpose to participate in the YouthBuild program to successfully attain a HSD
- Must attend and be selected for enrollment after completion of Mental Toughness

WHAT Steps		WHO Staff	WHEN Frequency	WHERE Location	HOW Document
1	Prospective applicant completes an application. Applications are printed and passed on to hiring team.	Front desk staff	Daily	Online, in front offices or at recruitment events	Link to application
2	Applicants will be called and pre-screened for eligibility by the initial hiring team. Initial pre-screen criteria include: ▪ Age of participant ▪ Educational status (has not earned a HSD and is not currently enrolled in a high school program) ▪ Drop-out status	Initial hiring team consists of: Program Assistant, Recruiter, Interns	Weekly, starting three months prior to scheduled Mental Toughness	Phone, social media and/or email contact attempts.	Link to tracking spreadsheet
3	Initial hiring team will contact applicants who meet the pre-screen criteria and invite them to attend an informational session.	Initial hiring team consists of: Program Assistant, Recruiter, Interns	Daily/Weekly	Phone, social media and/or email contact attempts.	Link to tracking sheet & pre-screen criteria

WHAT Steps	WHO Staff	WHEN Frequency	WHERE Location	HOW Document
4 Applicants will attend an informational session. The session will include program overview, program expectations, documentation requirements and the next steps required for program enrollment	Program Manager and Program Specialist will facilitate information session.	Bi-weekly for six weeks preceding Mental Toughness start date	Agency headquarters	Link to documentation requirements list
5 Applicants will sign up for an interview at the end of the informational session if interested.	Program Specialist manages interview sheet and informs interviewing staff	Bi-weekly, at conclusion of information session	Agency headquarters	Link to interview sign-up sheet. Link to tracking sheet
6 Senior hiring team conduct interview with applicants to assess readiness and commitment	Senior hiring team consist of Program Manager and Program Specialist	Over the course of one month prior to Mental Toughness Start Date	Agency headquarters	Link to interview questions and scoring rubric Link to tracking sheet
7 Applicants complete initial barrier assessment following interview and review documentation requirements. Ongoing contact maintained to encourage follow through and provide necessary supports to obtaining documentation.	Case Manager	Over the course of one month prior to Mental Toughness Start Date	Agency headquarters	Link to barrier assessment
8 Program Manager reviews applicant tracking list and makes final Mental Toughness invite list, and wait list (if applicable)	Program Manager	One week prior to Mental Toughness	Virtually or at Agency Headquarters	Link to tracking sheet
9 Selected participants are invited to Mental Toughness, with conditions to submit required paperwork.	Program Manager	One week prior to Mental Toughness	Phone (email or social media if phone contact not successful)	Link to tracking sheet
10 Participants attend Mental Toughness. Senior hiring team meets to review prospective applicants and create final selection list and wait list (if applicable)	All Staff/Senior Hiring team	Mental Toughness	Multiple locations during Mental Toughness (headquarters, service projects, tours)	Link to Mental Toughness Evaluation Tool

Procedure may also be presented in a narrative format, but should still ensure that all relevant questions are covered in the narrative (how, who, when, where, what):

EXAMPLE

The YouthBuild eligibility and selection process will be as follows:

- Potential applicants complete an application either online at on the YB Agency website, at the YB Agency building (or community hiring events).
- Front Desk staff will print and collect applications and submit to the initial hiring team.
- Applicants will be called and pre-screened for eligibility by the initial hiring team. Initial pre-screen criteria include:
 - Age of participant
 - Educational status (has not earned a HSD and is not currently enrolled in a high school program)
 - Drop-out status
- Initial hiring team will contact applicants who meet the pre-screen criteria and invite them to attend an informational session or attend school enrollment dates. Applicants will be contacted at all phone numbers provided. In the case that no phone number is in service, applicants will be emailed if an email address or through social media contact if known.

6.1 Interview

The interview is an extensive interview conducted by more senior staff members. Applicants will be scored based on this interview, as a key determining factor for final consideration of being invited to YB.

- Upon completion of the interview, interviewing staff will score the interview and mark “Yes”, “Maybe” or “No” to indicate their recommendations on the applicant, as well as strengths and weaknesses for follow up in the final selection meeting.
- Applicants marked as “Yes” or “Maybe” will be provided the information to complete the Background Authorization form and a drug screen at the approved YB Agency location.

6.2 Selection

- One week prior to the first day of Mental Toughness, the Program Manager will review the final applicant pool to determine final invites to YB and if applicable, those placed on a waitlist.
- Once the final list is identified, including those on the waitlist to be considered, the Program Manager will make final program invites. All efforts will be made to contact and invite those who were the Interviewers final selection list. In the case that an applicant is not able to be reached or declines the YB invitation, the Program Manager will contact those on the waitlist, based on their id identified priority in order to fill all open positions for YB.
- Applicants will attend and complete Mental Toughness.
- Senior staff will complete evaluation of all Mental Toughness attendees and make a final determination on program selection for enrollment based on the results of their evaluation scores.

Procedure Development Tool

PROCEDURE FOR:

ASSOCIATED POLICY:

WHAT Steps in Process	WHO Staff	WHEN Frequency	WHERE Location	HOW Documentation