

# Operating Procedures Manual - TOC

## Table of Contents - Sample

Sample table of contents for an organization's operating manual, also used as a staff-training manual.

### Table of Contents

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2. History and Overview.....	2
3. Mission Statement	
4. Vision Statement	
5. Value Statement – Core Purposes	
6. Board of Directors and Officers	
7. Committee Chairs and Members	
8. Committee Descriptions	
9. Past Presidents	
10. Industry Background and Useful Articles	
11. Organizational Charts, Information Flow and Hierarchy	
<b>Office Responsibilities</b>	
1. Daily Tasks - Morning (Group responsibilities – phone messages, fax machine, etc.)	
2. Daily Tasks - Afternoon (Group responsibilities – UPS Shipments, lights off, etc.)	
3. Daily Tasks – Specific to the individual	
<b>Getting Started</b>	
1. Office Contact Information – addressees, phone, fax, Website, all employee email addresses, etc.	
2. Tax ID #, where to find W9 forms	
3. Proper Phone Handling -Transferring calls; calls to avoid; types of calls – who to transfer to	
4. Publications Overview	
5. Frequently Asked Questions about Publications	
6. Membership Overview and Processes New Member Processing; Member Solicitation; Dues and Renewals	
7. Frequently Asked Questions about Membership	
8. Frequently Asked Questions about the Website ( <a href="http://www.####.com">www.####.com</a> )	
<b>Membership</b>	
1. Overview	
2. Regular Members – forms, informational brochures, applications, etc.	
3. Honorary Members - forms, informational brochures, applications, etc.	
4. Student Members - All forms, informational brochures, applications, etc.	

## **Certification**

1. Exam Overview
2. Qualifications to Sit for Exam
3. Schedules and Costs
4. Studying, Resources
5. Registration Process

## **Publications**

1. About each Publication
2. Pricing Structure
3. Other Publications – not internally published but often asked about
4. Order Forms and Processing

## **Annual Conference, Seminars, and Exhibiting**

1. Frequently Asked Questions about Conference
2. Recent Conference Brochure and Registration Information
3. Frequently Asked Questions about Seminars
4. Recent Seminar Brochures and Registration Information
5. Frequently Asked Questions about Exhibiting and Trade Show
6. Recent Exhibitor Kit

## **Shipping and Mailing Procedures**

1. UPS – how to/account information/ordering supplies/rules/restrictions
2. Federal Express - how to/account information/ordering supplies/rules/restrictions
3. US Postal Service Domestic Mail - how to/account information/ordering supplies/rules/restrictions
4. US Postal Service Foreign Mail - how to/account information/ordering supplies/rules/restrictions

## **Logo and Branding**

1. Policy – Logo Usage, Restrictions and Standards
2. Style Guide for Communications

## **Annual Calendar**

1. By month – lists all cyclical projects (Jan. 31 – run statements of account, etc.)
2. Contributing to the Calendar

## **Standard Responses** (formatted for instant email response – use as reference for phone calls – includes “How To” when appropriate)

1. “How do I become Certified?”
2. “How do I become a Member?”
3. “How do I become a Affiliate?”
4. “Where can I get more training?”
5. Requests for interpretation of a technical document
6. Requests for general information
7. How to send out a sales lead to Members

8. “Verifying a certified member”
9. How can I serve on a committee?
10. “I’ve signed up for XXX working committee – now what?”

**General “How To’s”** (As training moves forward, the individual is responsible for updating this part of the notebook)

1. How to burn a CD
2. How to burn a CD for use in a Macintosh
3. How to take a phone call order
4. How to pick up and verify an order over the website
5. Website passwords
6. Ordering publications when inventory is low
7. Ordering general office supplies
8. Customer requests for invoice copies
9. Customer requests for a different method of shipping
10. When we receive a bill
11. Rebooting the server
12. When it’s time to call the “IT guy”
13. Removing a jam from the printer
14. Removing a jam from the fax machine
15. Fax/Printer repair service
16. When it’s time to call the accounting department
17. New Member Packets – how to process and what to send
18. Renewing Member Packets - how to process and what to send
19. Inquiries - how to process and what to send
20. Publication Orders - how to process and what to send
21. Exam registrations
22. Conference registrations
23. Seminar registrations
24. Exhibitor registrations
25. Affiliate renewal notices
26. Renewal notices

### **Policies**

1. Read the policy manual thoroughly.
2. New policies are handed out at staff meetings – individuals are quizzed at next week’s staff meeting.

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Provided as a sample table of contents for developing an **Operations** and/or **Training Manual**. Best way to start on developing a manual is to bring staff together to create the table of contents, or to use an annual calendar and determine every procedure and responsibility that should be documented.

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