



Standard Operating Procedures (SOP) POLICY MANUAL REVISIONS-Administrative

Page #	1 of 4	Date Last Reviewed/Updated	7/25/18 (new)
Title of SOP Author	Donna Rutledge	Date of Executive Director Approval	7/30/18

SOP Title	Policy Manual Revisions (Revising, tracking changes, storing, distributing and communicating amended Fiscal Operating Policy & Procedure Manual and Human Resource Policy Manual).
Purpose	The purpose of this policy and procedure is to establish the lines of responsibility and a consistent method for tracking changes, storing, distributing and communicating revised policies, so that all information is conveyed clearly, concisely and accurately when policies are amended in order to maintain quality business standards of Yadkin Valley Economic Development District, Inc. (YVEDDI).
References	N/A
Scope	<p><u>Fiscal Operating Policy & Procedure Manual</u></p> <p>The Communication’s Specialist is responsible for assisting in the revision of the Fiscal Operating Policy & Procedure Manual; tracking changes, storing, distributing and communicating revised policies.</p> <p><u>Personnel Policy Manual</u></p> <p>The Executive Assistant is responsible for assisting in the revision of the Personnel Policy Manual; tracking changes, storing, distributing and communicating revised policies.</p>
Definitions	
Procedure	<p>Fiscal Operating Policy & Procedure Manual Revisions</p> <ul style="list-style-type: none"> ▪The Finance Director will provide the Communication’s Specialist written details for the desired policy amendment by: <ol style="list-style-type: none"> 1. using a printed copy of the “current’ policy; writing the revisions <u>under</u> the existing data. (revisions should be in red ink) or 2. the Finance Director may make amendments on the PDF file by using the tools options and then forwarding the PDF file to the Communication Specialist 3. or the Finance Director may request a “copied and pasted” version of a specific policy to update and return to the Communications Specialist. ▪Once the Communication’s Specialist receives the policy change; he/she will



Standard Operating Procedures (SOP) POLICY MANUAL REVISIONS-Administrative

Page #	2 of 4	Date Last Reviewed/Updated	7/25/18 (new)
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open the Fiscal Operating Policy & Procedure Manual “working” document from his/her computer file.

Once the document is opened, the following process will be completed:

(Dates are used for example only-the current revised date should be used)

The current document named Fiscal Operating Policy & Procedure Manual revised 10-15-2016” will be RENAMED ”Fiscal Operating Policy & Procedure Manual revised 7-26-18 (new date)”.

The new working document will now be “Fiscal Operating Policy & Procedure Manual revised 7-26-2018”.

The Communications Specialist will make the requested changes to the “Fiscal Operating Policy & Procedure Manual revised 7-26-2018” and noting the revised date at the beginning of the specified policy and on the front cover.

The revisions will be recorded in the back of the manual under “Amendments” that will include the following:

Policy Name (specify)

Date of Amendment

Current policy

New policy

Once revisions have been completed, the document will be saved in PDF format.

The Communications Specialist will share the document either by email or hard-copy accordingly:

- Finance Director
- Executive Director

The Communications Specialist will post the revised document on www.yveddi.com, under the “Management” tab.

The only “working” document of the Fiscal Operating Policy & Procedure Manual will be housed on the Communications Specialist computer.

Human Resource Policy Manual

▪The Human Resource Director will provide the Executive Assistant written details for the desired policy amendment by:

1. using a printed copy of the “current’ policy; writing the revisions under



Standard Operating Procedures (SOP) POLICY MANUAL REVISIONS-Administrative

Page #	3 of 4	Date Last Reviewed/Updated	7/25/18 (new)
Title of SOP Author	Donna Rutledge	Date of Executive Director Approval	7/30/18

	<p>the existing data. (revisions should be in red ink) or</p> <ol style="list-style-type: none"> 2. the Human Resource Director may make amendments on the PDF file by using the tools options and then forwarding the PDF file to the Executive Assistant 3. or the Human Resource Director may request a “copied and pasted” version of a specific policy to update and return to the Executive Assistant. <p>▪Once the Executive Assistant receives the policy change; he/she will open the Human Resource Policy Manual “working” document from his/her computer file.</p> <p>Once the document is opened, the following process will be completed: (Dates are used for example only-the current revised date should be used)</p> <p>The current document named Human Resource Policy Manual revised 10-15-2016” will be <u>RENAMED</u> ”Human Resource Policy Manual revised 7-26-18 (new date)”.</p> <p>The new working document will now be “Human Resource Policy Manual revised 7-26-2018”.</p> <p>The Executive Assistant will make the requested changes to the “Human Resource Policy Manual revised 7-26-2018” and noting the revised date at the beginning of the specified policy and on the front cover.</p> <p>The revisions will be recorded in the back of the manual under “Amendments” that will include the following:</p> <p>Policy Name (specify) Date of Change Current policy New policy</p> <p>Once revisions have been completed, the document will be saved in PDF format.</p> <p>The Executive Assistant will share the revised document by email accordingly:</p> <ul style="list-style-type: none"> ▪All Management staff ▪The document will be sent to the Communications Specialist with instructions to post on www.yveddi.com, under the “Staff” tab. ▪The document will be sent to the Accounting Specialist or the Human Resource Director to post on www.my-estub.com.
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Standard Operating Procedures (SOP) POLICY MANUAL REVISIONS-Administrative

Page #	4 of 4	Date Last Reviewed/Updated	7/25/18 (new)
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	<p>▪The Human Resource Director (or appointed staff) will email the Human Resource Policy Manual and the “Staff Sign Acknowledgement Statement” form to all Management staff.</p> <p>Note: Management staff is responsible for forwarding to their subordinate staff.</p> <p>The signed Staff Sign Acknowledgement Statement form should be returned to the Human Resource Director.</p> <p>The only “working” document of the Human Resource Policy Manual will be housed on the Executive Assistant’s computer.</p>
Note	<p><i>All changes require Board approval and noting approval should be made by dating the specific policy.</i> Example: Board Approved 7/20/2018</p> <p>In order to prevent multipliable out-of-date manuals from being used, only one (1) “working” WORD document for each manual is available.</p> <p>If for any reason the Communication’s Specialist or the Executive Assistant are no longer available and no successors/predecessors are in place, a ticket will have to be sent to IT Support in order to retrieve the documents from their computers.</p>