Preliminary Steps to Creating a Solid SOP

- 1. Identify a point person/people responsible for developing & making updates to the SOP
- 2. Start with your goal: What are you setting out to do?
 - Develop a draft RCORP Data Collection & Reporting SOP
- 3. Select a format/template: Build your own from scratch or grab one from the internet
- **4. Define your scope:** What is the purpose of your document?
 - To clearly outline all steps in the RCORP data collection and reporting process, including: PIMS measures relevant to each consortium member, frequency of reporting, responsible parties, standards for communication with consortium member around obtaining data, performing data checks, submission in EHBs



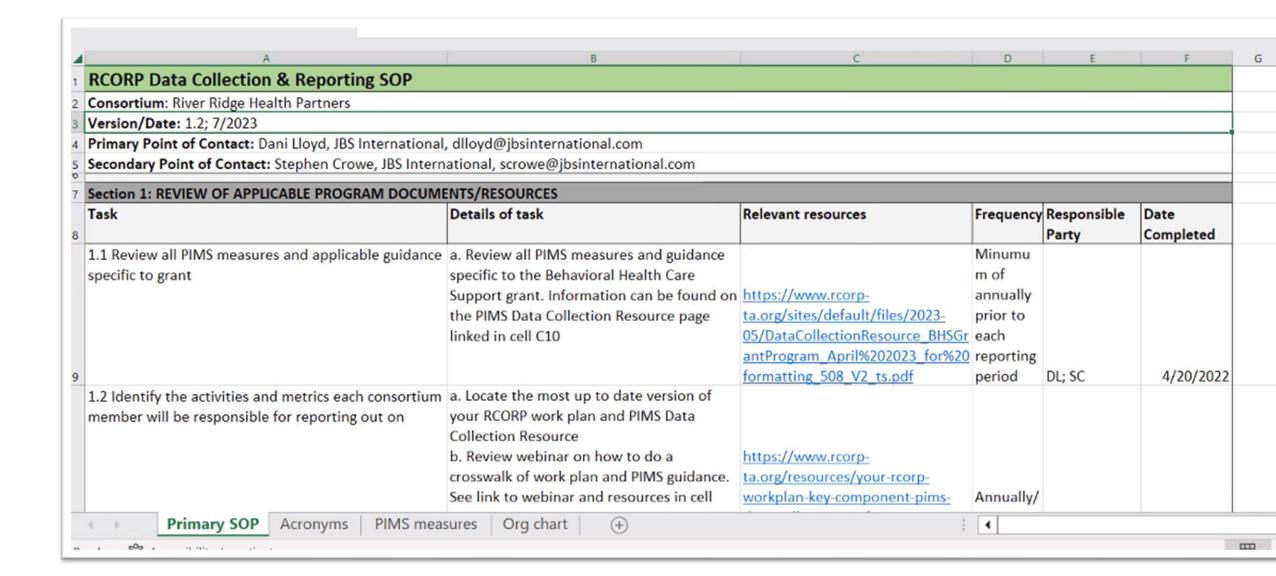




- **4. Identify your audience:** Who are you writing this SOP for?
 - Data Coordinator, Project Director, other evaluators/staff providing support
- **5. Gather information:** Meet with the people doing the work and document how they are doing it
 - For instance: schedule meetings with your data staff to learn about current processes in place for data collection and reporting
- 6. Create your outline + write your first draft
 - Reach out to the Eval team, TEL and PO if you'd like feedback
- 7. Review with your team + adjust based on staff feedback
- 8. Implement!



- ✓ **Title:** Name your document
- ✓ **Scope of SOP:** Use the purpose language you developed in preliminary steps
- ✓ **Glossary & Acronyms:** Especially helpful for new staff
- ✓ Processes/Checklists: The core component of your document
 - ✓ Multiple sections to reflect different processes/tasks
 - ✓ Identify responsible parties



0		webinar	process	necessary	DL	4/25/2022	
	1.3 Once all activites and associated metrics are	a. Develop a document for each consortium					
	identified, share with each consortium member so they	member clearly outlining the activities they					
	are aware of which metrics they must report out on	are conducting and the metrics they are					
		expected to report b. Email					
		documents to consortium members and					
		inform them a meeting will be scheduled to					
1		review the activites and metrics		Annually/a	DL	5/1/2022	
		a. Send out a Doodle poll to all consortium					
		members 1 month prior to anticipated					
		meeting date/time b. Choose date					
		that is best based on abailability c.					
		Prepare presentation 1 week in advance					

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13	Section 2: COLLECTION OF RCORP PIMS DATA FROM CON	SORTIUM MEMBERS		U		
	Task	Details of task	Relevant resources	Frequency	Responsible	Date
14					Party	Completed
	2.1 Develop data collection tool to be used for gathering					
15	data from consortium members					
	2.2 Hold a training for consortium members on utilizing					
16	the tool, to address troubleshooting, and elicit feedback					
	2.3 Update tool as needed after feedback from					
17	consortium members					
	2.4 Send 1st reminder email to consortium members in					
18	advance of PIMS due date					
	2.5 Review data as it it is received by consortium					
19	members					
	2.6 Respond to consortium members with					
20	questions/clarifications as needed					
21	2.5 Send 2nd reminder if needed					
22	2.6 Review any corrected data received					
23	2.7 Complete all data checks					
24	2.8 Submit data in EHB by due date					

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- Schedule regular reviews of the SOP to update as needed
- Incorporate the SOP into staff development/training
 - Be open to feedback from staff and make changes as needed
- Use visuals and <u>checklists</u> to make the document easier to follow and utilize



August 2023 PIMS Data Office Hours

- Tuesday, August 8th: 3-4pm ET
- Wednesday, August 23rd: 4-5pm ET

https://us02web.zoom.us/j/ 86536247502?pwd= VGJHeGFnMlhDK0o3eDFmQlp6UDhJ dz09