



## Define Rules and Expectations Process Summary

Process Owner: Tracy Mann

Issue Date: Nov 8, 2018

<p><b>PROCESS PURPOSE AND PRODUCTS</b></p> <p><i>Why is it important that this process exists?</i></p>	<ul style="list-style-type: none"> <li>Volunteers know what's expected of them with clear boundaries.</li> </ul>																		
<p><b>CUSTOMERS AND REQUIREMENTS</b></p> <p><i>The names of the people who receive the products/services of the process and their requirements.</i></p>	<ul style="list-style-type: none"> <li>Volunteers. Know my role and be able to do it well.</li> <li>Staff. Volunteers know their role. Consistency across roles and with people in a role</li> </ul>																		
<p><b>PROCESS STEPS</b></p> <p><i>Outline timing and involved people of key steps.</i></p>	<table border="1"> <thead> <tr> <th>Key Steps</th> <th>Frequency/Timing</th> <th>Who</th> </tr> </thead> <tbody> <tr> <td>• Review needs assessment and Vision (understand role needs)</td> <td></td> <td></td> </tr> <tr> <td>• Review role descriptions</td> <td>Annual</td> <td>Staff, e.g. Grant for Mentors</td> </tr> <tr> <td>• Update the Rules &amp; Expectations "page"</td> <td></td> <td></td> </tr> <tr> <td>• Volunteers "sign off" that they have read and agreed to all rules and expectations</td> <td>Annual</td> <td>Volunteers</td> </tr> <tr> <td>•</td> <td></td> <td></td> </tr> </tbody> </table>	Key Steps	Frequency/Timing	Who	• Review needs assessment and Vision (understand role needs)			• Review role descriptions	Annual	Staff, e.g. Grant for Mentors	• Update the Rules & Expectations "page"			• Volunteers "sign off" that they have read and agreed to all rules and expectations	Annual	Volunteers	•		
Key Steps	Frequency/Timing	Who																	
• Review needs assessment and Vision (understand role needs)																			
• Review role descriptions	Annual	Staff, e.g. Grant for Mentors																	
• Update the Rules & Expectations "page"																			
• Volunteers "sign off" that they have read and agreed to all rules and expectations	Annual	Volunteers																	
•																			
<p><b>TOOLS</b></p> <p><i>Tools used to execute the process.</i></p>	<table border="1"> <tr> <td>Web-based resources pages</td> <td>Tony to start</td> </tr> <tr> <td>Role descriptions</td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> </table>	Web-based resources pages	Tony to start	Role descriptions															
Web-based resources pages	Tony to start																		
Role descriptions																			
<p><b>MEASURES</b></p> <p><i>What measures are used to know if the process is performing and that customer requirements are being met?</i></p>	<ul style="list-style-type: none"> <li>Policies are documented and reviewed once per year (may be none).</li> <li>Role descriptions are documented and reviewed once per year (but this is part of the Create Clear Process).</li> <li>Volunteer handbook/web-based resource page is up-to-date.</li> </ul>																		
<p><b>ASSESSMENT OF SYSTEM PERFORMANCE</b></p> <p><i>How is the process performing?</i></p>	<ul style="list-style-type: none"> <li>Needs improvement.</li> </ul>																		
<p><b>IMPROVEMENT PLAN</b></p> <p><i>What is the plan to improve the effectiveness of the process?</i></p>	<ul style="list-style-type: none"> <li>Erich to meet with attorney to decide if this is a policy or process.</li> <li>Define the list of rules, standards and expectations.</li> </ul>																		