From Chaos to Clarity: Revamping Our District's HR SOP Index System

eHCLE Final Presentation

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Human Capital Leadership in Education (eHCLE)

PRESENTER

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TOLEDO PUBLIC SCHOOLS — DISTRICT BY THE NUMBERS

20,000
Students

4,000+
Employees

58
Schools

4
Early Childhood

35
Elementary

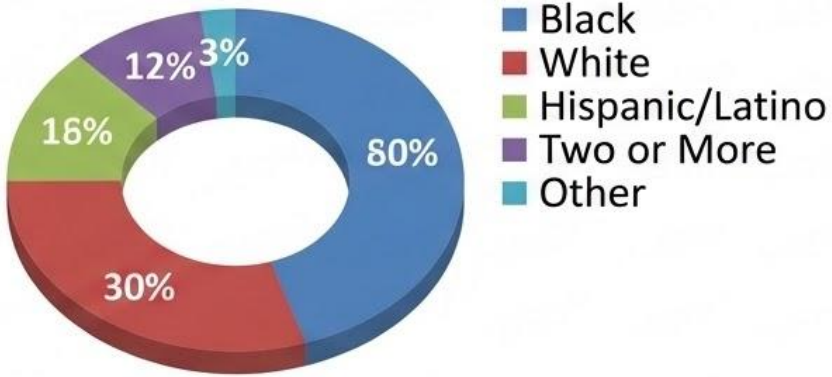
6
High Schools

12
Magnet Programs

1
Virtual Academy

80%
of district expenses are salaries & benefits

Student Demographics



Session Overview & Objectives

Why Strong Systems Matter

Why strong systems matter most during disruption and transition

Redesigning the SOP Index

How we redesigned the Standard Operating Procedure (SOP) Index to improve accessibility, clarity, and usability

SOP Audit & Indexing Strategies

Practical strategies to audit SOPs and build a logical indexing structure

Supporting Onboarding & Resilience

How this system supports onboarding, cross-training, and operational resilience

What is a Standard Operating Procedure or SOP?

What Is Standard Operating Procedure (SOP)? Writing Guide and Definition from TechTarget

Human Capital Executive Standards

What are the standards for Human Capital? Competencies that leaders in PK-12 and related organizations need to strategically direct human capital systems.

Reference: www.aaspa.org 2025 eHCLE_standards_FINAL.pdf

eHCLE Standards Alignment

ACTIVITY: Your Experience...

Question #1-When you need to find a process or procedure in your organization, how confident are you that you can find the correct SOP quickly?

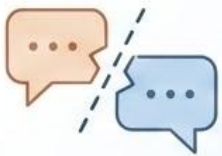
Question #2-Which statement best describes your organization's SOP system?

Question #3-How many SOPs does your organization currently maintain?

Question #4-What is the biggest challenge with SOPs in your organization?

Our Journey
From Chaos to Clarity

Context: The Problem We Faced



Communication Breakdowns

Lack of inter and cross departmental communication and agreement created process confusion

Inconsistent SOPs

SOPs existed, but were inconsistently named, outdated, or difficult to find

Knowledge Silos & Risk

Knowledge silos increased operational risk and slowed onboarding

Need for a Single Source of Truth

Leaders and staff needed a single, reliable source of truth

The Catalyst: Gaps Across Divisions

Observed process gaps emerging across Business Business Division and Auxiliary Services

Inconsistent Documentation & Risk

Inconsistent documentation led to workarounds and risk

Siloed Systems

Directors owned pieces of processes, but systems weren't aligned

This became the impetus to audit our SOP Index system

The Journey: From Chaos to Clarity

- **Beginning of the journey:** Transitioning into the HR Director role
  - Early observations of consternation and confusion between departments
  - Inconsistent processes and frequent questions about department roles
- **Realization: We needed a single source of truth for how work gets done**

Conversation #1: Payroll & HR Tech Conflict

Payroll Specialist:
Do you even have a process for this? This isn't getting done correctly!

HR Tech:
I have been following the process that was explained to me...

Payroll Specialist:
I can't believe that and if so, you all need to get it together, because it's wrong!

The conversation continues until the HR Tech breaks down crying and threatens to quit because she can't handle the "disrespect" that is presented whenever payroll calls and accuses the processes of being wrong.

Conversation #2: Leave Request Conflict

Employee email: I don't understand why my leave day after Spring Break was denied. My principal approved it!

HR Director → Principal: I received a leave approval for the day after Spring Break. Per the CBA that day must be unpaid.

Principal: I thought teachers could use a personal day!?

HR Director: Please use the shared leave calendar and the leave cheat sheet so we stay consistent with contract rules.

Principal: I guess I should do a better job at reading the Principal weekly updates?

Purpose & Goals of the Project

Create a clear, logical SOP Index system for districtwide use.

Improve compliance, consistency, and continuity during transitions.

Support onboarding and cross-training across departments.

Reduce operational risk during times of disruption.

Desired Results

Increased clarity on SOP ownership and accountability

Enhanced Access

Improved access to high-priority SOPs during transitions

Time Efficiency

Reduced time spent locating procedures and templates

Consistent Onboarding

Improved onboarding consistency for new and displaced staff

Method: What We Did

1. Full SOP Audit & Standardization

Conducted a comprehensive review using a standardized checklist.
Standardized naming conventions, owners, and alignment to HC domains.

2. Priority-Based Indexing

Created a priority-based SOP Index with color-coding for easy navigation and identification of critical processes.

3. Integration with Tools

Directly linked SOPs to relevant templates and supporting documents to streamline workflows.

Method: How We Did It

- Human Resources Administrative Team worked together to plan and execute

Resources

- HR team time, SOP templates, shared drive / index tool

Communications

- Leader briefings, written guidance, and coaching

Change Management

- Emphasized ease of use, compliance, and reduced rework

Process & Review

- Clear direction throughout the process, and
- Focused time to review revised SOPs

TPS PROUD
TOLEDO PUBLIC SCHOOLS

The Audit: Taking Inventory of Our SOPs

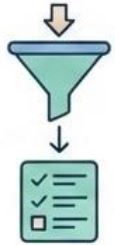
Starting Point & Issues

Starting point: 142 SOPs in the HR index

Issues identified: duplicates, outdated steps, unclear ownership, misalignment

Goal

- Pare down and create a more effective, usable system



Approach

Prioritize high-risk and high-impact processes first

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TOLEDO PUBLIC SCHOOLS

SOP Template & Index

Standard Operating Procedure Template

[Standard Operating Procedure]

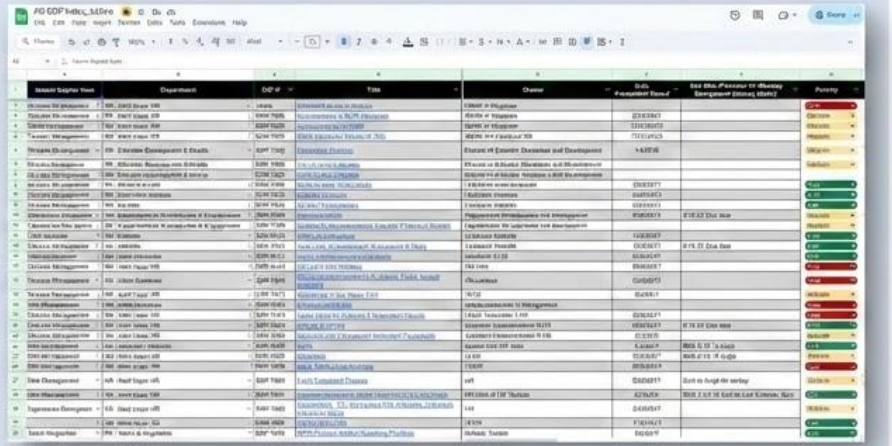
Implemented by		Procedure #	
Department		Owner	
Effective Date		Last Updated	

Purpose:

Responsible Parties:

Who	Document	Action Steps

HR SOP Index_Active



Improvement

BEFORE

- ✗ 142 SOPs; inconsistent names
- ✗ owned by individuals; no prioritization
- ✗ unclear owners; hard-to-find templates
- ✗ siloed processes

AFTER

- ✓ Fewer, high-impact SOPs; standard naming
- ✓ owned by positions (not a person) prioritized by risk
- ✓ linked templates within SOPs;
- ✓ aligned HC domains and cross-department visibility

ACTIVITY: Reflection

- **Prompt:** Think of ONE critical process in your organization that would break if a key person left tomorrow.

- In the chat answer the following:

? – What is that process?

– Is there an SOP? (Yes / No / Not sure)

SURVEY

Gathering Insights & Feedback

Listening First: Conducted an SOP Survey

As we began reviewing our Standard Operating Procedures (SOPs), we recognized the need to better understand how **employees experience** procedures in their daily work.

What we wanted to learn

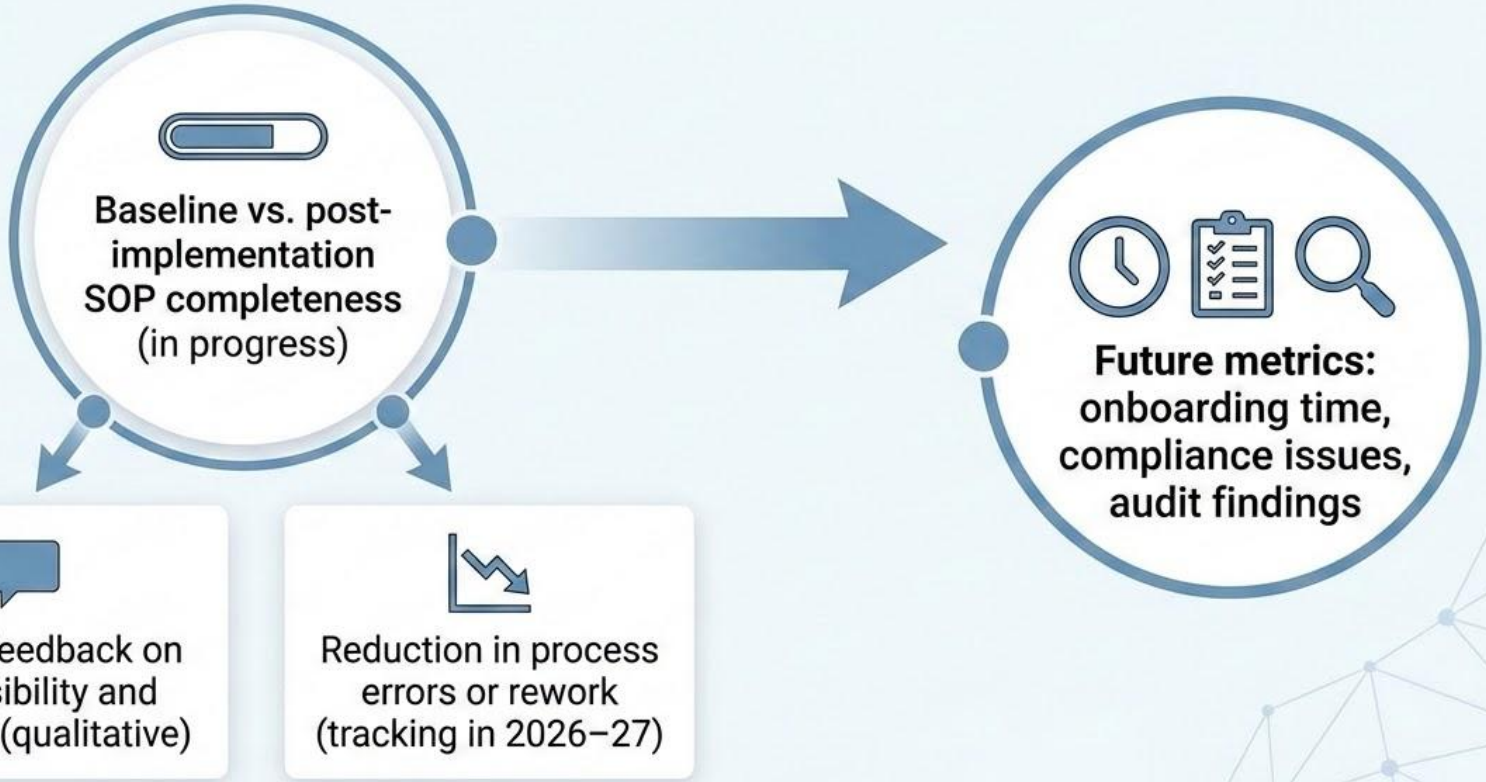
The HR team distributed a survey to gather feedback directly from employees about SOP usage and effectiveness.

- Who is currently using SOPs across the district
- Whether employees know where to find relevant procedures
- How confident staff feel using SOPs to complete tasks correctly
- What challenges employees face when using SOP documentation

How the Survey Informs the Work

- The feedback we received helps **guide the direction** of the SOP revamp.
- Identified gaps in accessibility and awareness of procedures
- Highlighted inconsistencies across departments
- Revealed the need for clearer documentation and centralized access
- Provided direction for modernizing the district’s SOP index system

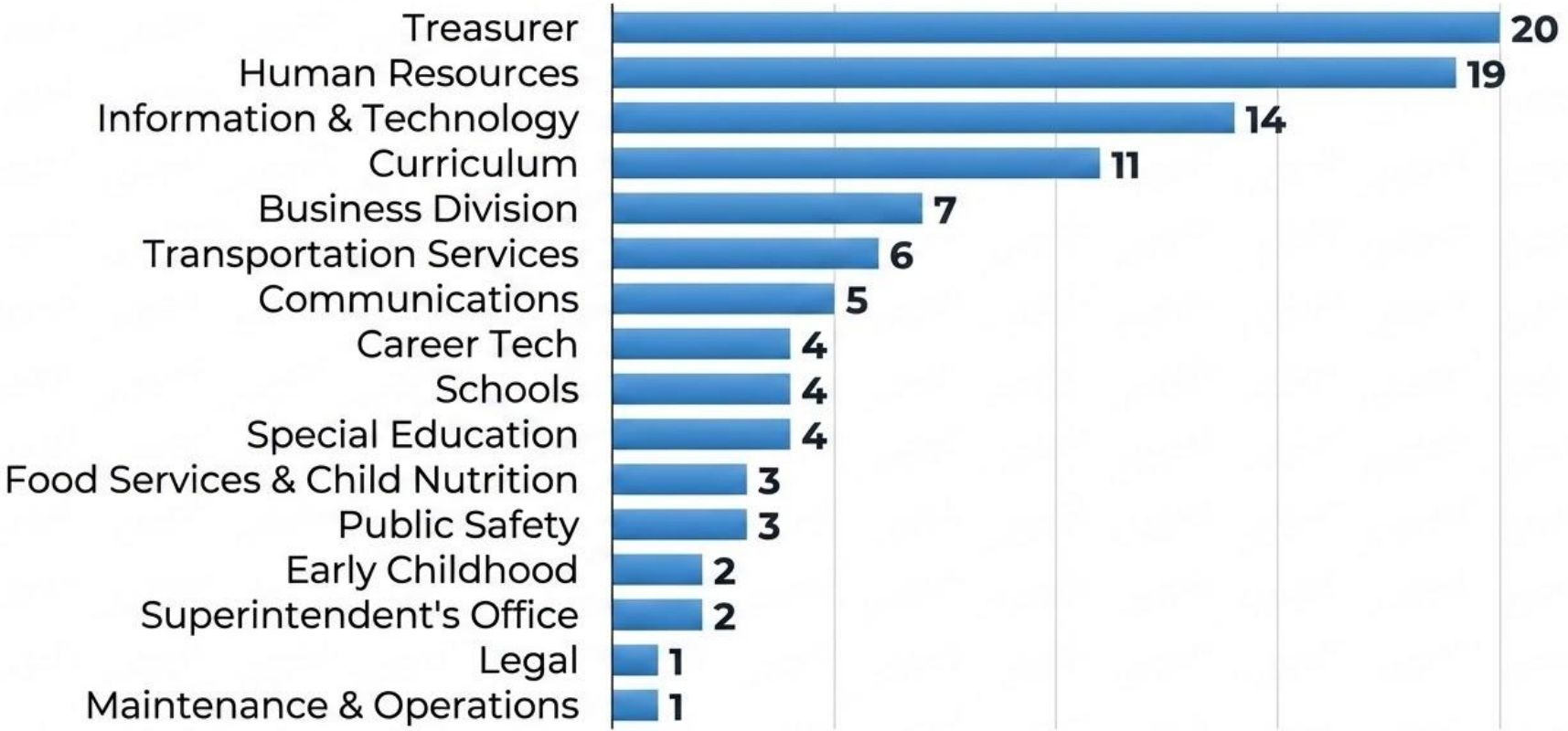
Data & Indicators-Timeline



DATA RESULTS

Results: Early Outcomes

Survey Participation by Division



Results: Early Outcomes

Q13 – How long have you been an employee at TPS?

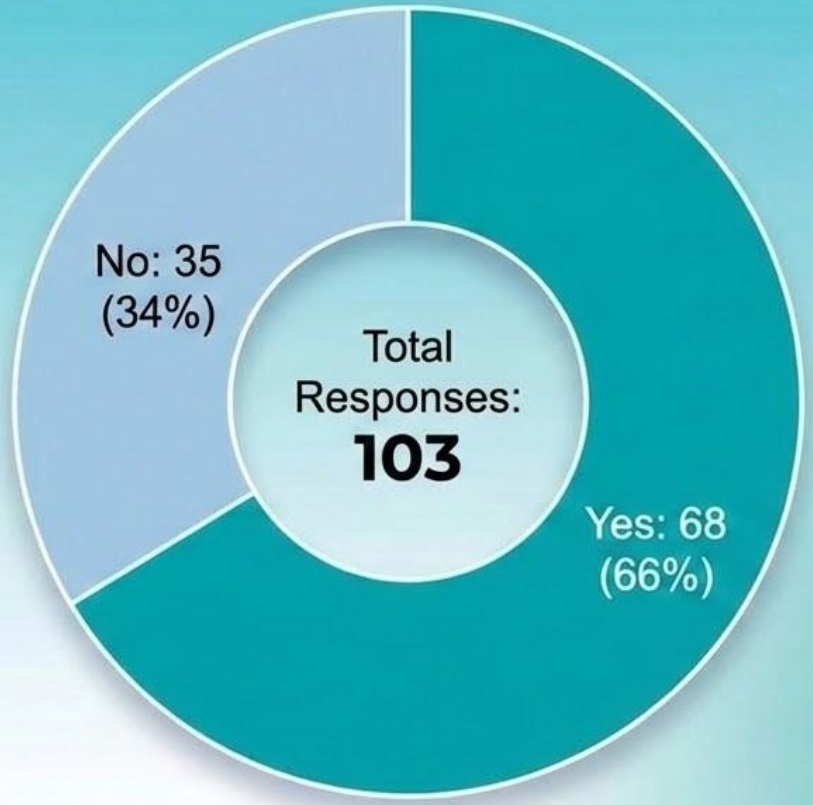
Q4 - Are you aware that Standard Operating Procedures (SOPs) exist for processes in your department?

Number of responses

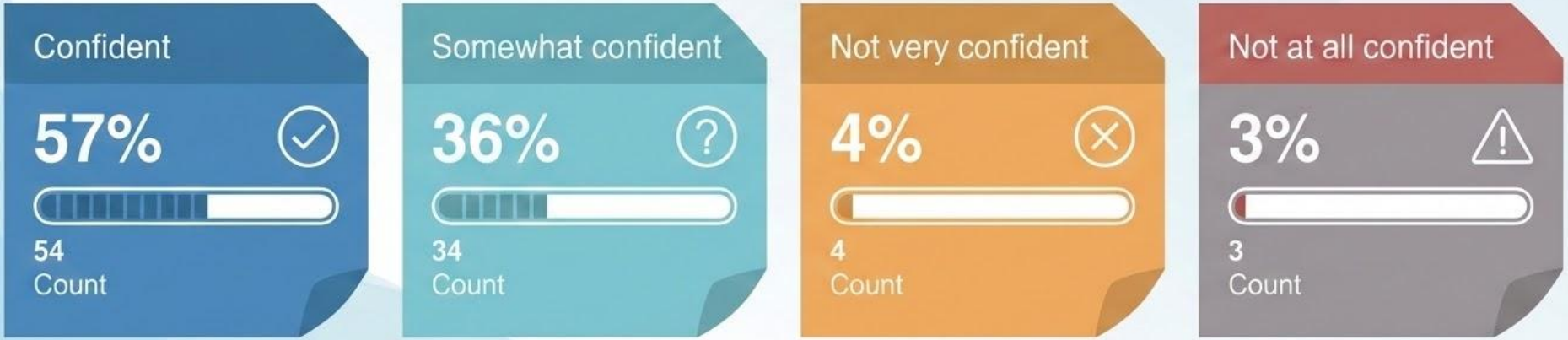
No: 18 responses (17%)

Yes: 89 responses (83%)

Q5 - Do you know where to find the SOPs relevant to your work?



Q6 - How confident are you in your ability to use the department SOPs to to correctly perform tasks?	Count	Number of responses
Confident	57%	54
Somewhat confident	36%	34
Not very confident	4%	4
Not at all confident	3%	8



Q7 - In your opinion, how helpful are the current SOPs in guiding you through your regular tasks?

Helpful	46%	42
Somewhat helpful	32%	32
Not very helpful	9%	9
Not at all helpful	3%	8

Number of responses: 91

Feedback on SOP Accessibility & Visibility

A primary area for improvement is ensuring SOPs are **centrally located** and **easily accessible** to all relevant personnel.

- Improved Findability & Search
- Centralized Access for All Staff
- Clear Location & Organization

What We Learned from the SOP Survey

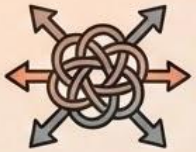
Most respondents were experienced staff members, with the majority having more than 10 years with the district.

Participants represented a wide range of divisions, indicating SOPs impact operations across the entire organization.

While most staff were aware that SOPs exist, awareness did not always translate into clarity about where to find them or which version to use.

Why This Matters for District Operations

The Cost of Unclear Processes



When processes are unclear, departments create their own workarounds, leading to inconsistency.

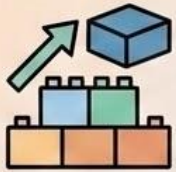
Confusion about procedures can cause frustration between departments and slow down decision-making.

The Value of a Clear SOP System

A clear, organized SOP system supports collaboration, accountability, and smoother operations across the district.

Implications for the Organization

Improves Operational Resilience During Restructuring and Turnover



Scalable Infrastructure

Creates scalable infrastructure for future change initiatives.

Compliance & Risk Management

Supports compliance and risk management.

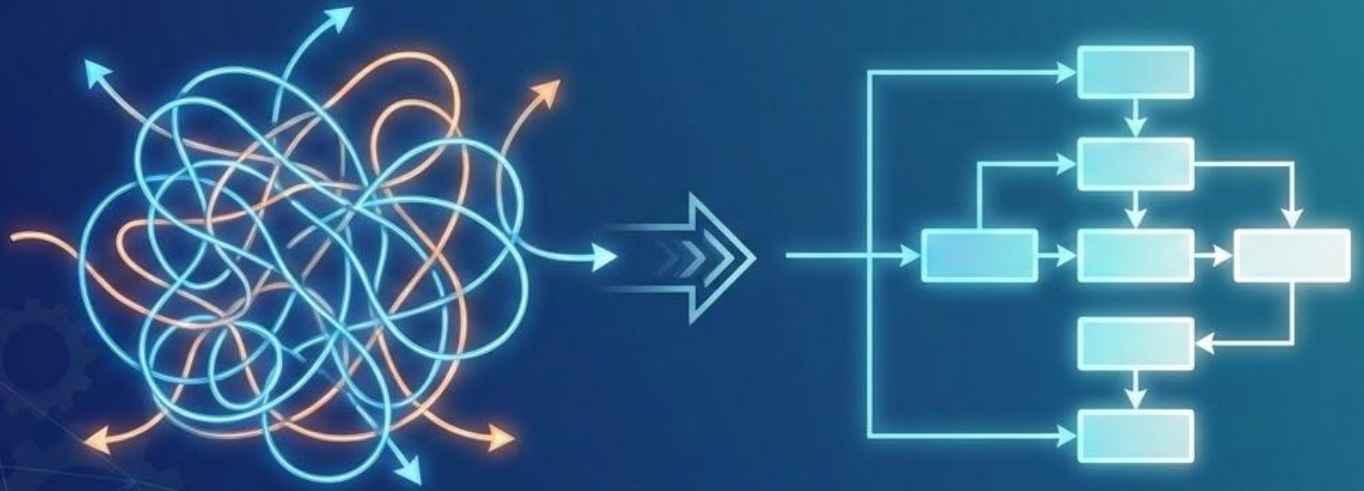
Replicable Model

Provides a replicable model for other districts.

Story Time:

Strong SOPs Drive Change Management

Rapid mid-year restructuring and staffing transitions created process confusion



The Reality Check: Mid-Year Cuts

Mid-year reductions and transitions increased operational risk

Turnover highlighted knowledge gaps and dependency on individuals

SOPs became mission-critical for continuity, onboarding, and cross-training

Lesson: Systems matter most during disruption

Recap

Journey Timeline (High-Level)

Phase 1 – Entry & Observation:
HR Director transition; identified confusion and gaps

Phase 2 – Catalyst:
Process gaps across divisions and auxiliary services

Phase 3 – Audit:
Reviewed 142 SOPs; prioritized high-risk processes

Survey

Phase 4 – Redesign:
Senior Directors collaborated to revise/retire SOPs

Phase 5 – Stress Test:
Mid-year cuts validated the system's importance

The Work: Team-Based Redesign

Collaborative Review

Collaborative review with Senior Directors

Decisions: revise, merge, or retire SOPs

Standardized naming, ownership by position, and HC domain alignment

Standardization & Alignment

Linked SOPs to templates and tools to improve usability

Outcome: Improved Usability

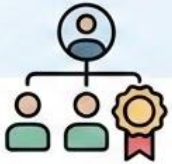
Streamlined processes and enhanced access to resources

Lessons Learned

Start with priority processes to build momentum

Standardization

Reduces confusion and risk



Ownership by Position

Critical for sustainability (not person)

Change Management

Matters as much as the technical system

Next Steps

- Post-Survey
- Updated training on cross-departmental SOPs
- Assistance with building individual department SOP Indexes

Final Activity: Your Next 30 Days

Chat me:

What is ONE action you'll take in the next 30 days to move your SOP system forward?

**Journeys don't start with perfection—they start with one intentional step.

Thank you for your participation!