

## **OPERATING PROCEDURE IMPLEMENTATION**

### **1. Purpose**

The purpose of this procedure is to describe the process for formalizing procedures within DSRA necessary for the Organization to conduct its business on a day to day basis in a consistent and a professional manner. Documented procedures shall assure that all Members of DSRA follow the same steps in conducting the business of DSRA.

### **2. Scope**

The scope of this procedure covers all aspects of the procedure implementation process to include: the determination of a need; the actual writing of the procedure; the approval of the procedure; the placement of the procedure into the Document Control System; and the communication, and if necessary the training, of the procedure to those who have a need to use the procedure. This procedure may include the implementation of a new procedure or also the amendment of an existing procedure.

Some procedures may require the development of a standard form or forms to be used in conjunction with following the steps of the procedure. The development, approval, and implementation of these forms is included in the scope of this procedure.

### **3. Responsibilities**

Any DSRA member in good standing who has been either elected or nominated to a position within DSRA which requires that Member to conduct business on behalf of DSRA can accept the overall responsibility to implement a new procedure or amend an existing procedure. However, the approval of the procedure is responsibility of the Board of Directors and the placement of the procedure into the DSRA Document Control System is the responsibility of either the Secretary of DSRA or to someone delegated by the Secretary [i.e. a Document Control Coordinator (DCC)].

### **4. Process Steps**

- 4.1 If any Member of DSRA in good standing in the process of conducting the business of DSRA determines that either a new procedure is required to complete their task or that an existing procedure requires amendment, then that Member may either take it upon themselves to initiate that action or seek input from their peers to corroborate the need for action.
- 4.2 Once the need has been determined and verified, the originator of the idea or an individual designated by DSRA shall either write the new procedure or amend an existing procedure as required. The procedure shall be written in the format prescribed by Appendix I of this procedure and used in the writing of this procedure.
- 4.3 If any forms are required to be used in the completion of the steps of the procedure, then these forms shall be created along with the procedure itself.
- 4.4 Once the procedure has been written along with any necessary forms, the originator of these documents shall submit them to the DSRA Secretary or their designee for placement into a secure location of the DSRA web site set aside for the Board Members to review these documents. Board Members may either approve these documents electronically or during a Board Meeting

- 4.5 If the documents are approved, the DSRA Secretary, or designee, shall assign Document Control Numbers to the procedure and forms and place them into a location of the DSRA web site set aside for the placement of approved documents. For revised documents, the revision level of the document shall be updated.
- 4.6 If the documents are not approved, they shall be returned to the originator for revision and the process shall repeat itself until approval is achieved.
- 4.7 Upon approval, the originator of the documents shall, as necessary, communicate the new or amended procedure and related forms to other Members of DSRA who may have need to use these documents. If training is needed for the successful implementation of the new or amended procedure, the originator shall be responsible for providing such training.
- 4.8 Approval dates for each revision level of the procedure along with the reasons for each change shall be documented at the end of each procedure in a "Change History Log". This log shall also include similar information for associated forms.

## 5. Record Keeping Requirements

The DSRA Secretary or designee shall maintain a record of approved DSRA procedures and forms to the latest approved revision level for the purpose of the use of the DSRA membership in the conduct of it's business and shall be posted on the DSRA web site.

## 6. Forms

DSRA Operating Procedures shall use the form provided in Appendix I of this procedure and shall utilize the DSRA format for Document Control.

## 7. Glossary

DSRA: Delphi Salaried Retirees Association

Document Control System: A methodology of controlling approved documents to the latest revision level to assure that only the correct documents are being used.

## 8. References

Document Control System Procedure: DSRAPROC 101

## 9. Change History Log

REV	APPROVED	DESCRIPTION OF CHANGE
000	3/4/2010	Initial application of DSRAPROC 100
001	7/21/2011	Delphi Salaried Retirees Association name updated.

**APPENDIX I**  
**DSRA OPERATING PROCEDURE FORMAT**

**Header**

The Header [top right] shall contain the Document Control System Information; Doc Control #, revision level, approval date plus the title of the originator [not by name] or person primarily responsible for the implementation of the procedure.

**Procedure Title**

The Title of the Procedure shall be centered below the Header information.

Following are Paragraph Titles which shall be located to the left side of the document below the Procedure Title:

**1. Purpose**

This paragraph shall contain a brief statement as to why this procedure is needed and what it expects to accomplish.

**2. Scope**

This paragraph shall contain a description of what this particular procedure specifically includes, and if necessary, what it specifically excludes.

**3. Responsibilities**

This paragraph includes information as to which individual[s] or group [by title and not name] is responsible for originating, implementing and maintaining this procedure.

**4. Process Steps**

This section of the procedure shall consist of as many paragraphs or sub-sections as necessary to describe in detail each step required to complete the intended purpose of this particular procedure.

**5. Record Keeping Requirements**

This section defines what records may be required to be maintained to show compliance to the completion of this procedure to include any possible audit compliance requirements.

**6. Forms**

This section contains a list of forms which may be required to be used to complete the steps of this procedure.

**7. Glossary**

This section contains a list of terms which may require definition or further explanation.

**8. References**

This section contains a list of other DSRA documents which may need to be referenced for further explanation of: why this procedure is needed, who benefits from the procedure, how this procedure interacts with other documents, etc.

## **9. Change History Log**

This section contains a log of: revision levels, approval dates and a description of the changes made for the procedure.

### **Footer**

The left side shows the document control number.

The center section shows the page number and the total number of pages in the document.

The right side shows the current date that the procedure is being viewed or was printed.

The Footer shall contain a disclaimer indicating that printed copies of DSRA documents are not controlled documents.