

The SOP Starter Guide

5 core standard operating procedures every nonprofit needs before they scale

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Most nonprofits scale their programs before they document how those programs work. The result: every site does things differently, training takes forever, and one staff departure breaks everything. These 5 SOPs are the foundation. Build them first.

THE 5 CORE SOPs

#	SOP	Covers	Must Include
1	Client Intake & Eligibility	Who qualifies, how they apply, what documentation is required, and who approves.	<ul style="list-style-type: none"> • Eligibility criteria written out • Intake form exists and is current • Approval process defined • Documentation retention policy in place
2	Program Delivery	Exactly how the program runs — step by step — at every location, every time.	<ul style="list-style-type: none"> • Written step-by-step delivery process • Staff roles defined per step • Quality standards documented • Exception/incident process included
3	Volunteer & Staff Onboarding	How new people learn what to do — before they start, not after.	<ul style="list-style-type: none"> • Orientation checklist exists • Role-specific training documented • Compliance training included • Sign-off process in place
4	Data Collection & Reporting	What gets recorded, who records it, where it lives, and when reports are due.	<ul style="list-style-type: none"> • Data fields defined per program • Entry timeline documented • Report templates exist • Funder reporting schedule noted
5	Emergency & Incident Response	What happens when something goes wrong — before something goes wrong.	<ul style="list-style-type: none"> • Incident categories defined • Escalation chain documented • Communication protocol written • After-action process included

SOP FORMAT & STATUS TRACKER

SOP	Format	Owner	Last Reviewed	Status
Client Intake & Eligibility	■ Written ■ Video ■ Checklist	_____	_____	■ Draft ■ Active ■ Needs Update
Program Delivery	■ Written ■ Video ■ Checklist	_____	_____	■ Draft ■ Active ■ Needs Update
Volunteer & Staff Onboarding	■ Written ■ Video ■ Checklist	_____	_____	■ Draft ■ Active ■ Needs Update
Data Collection & Reporting	■ Written ■ Video ■ Checklist	_____	_____	■ Draft ■ Active ■ Needs Update
Emergency & Incident Response	■ Written ■ Video ■ Checklist	_____	_____	■ Draft ■ Active ■ Needs Update

If you can't answer "who owns this SOP and when was it last updated" for all 5, your programs are running on tribal knowledge — not infrastructure. That's manageable at 1 site. It becomes a compliance and quality crisis at 3.

Ready to close the gaps?

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