

OTA
Operations and Administration
Section 5:
Program Director (PD)

- How To – Big Picture
- The “PD Mentality”
- Goals
- Time Management
- PD Notes
- Emergency Procedure
- Organization and Accountability

How To – Big Picture:

***Executing Properly the Function of Operating a Franchise Territory**

The first thing to consider when tackling the role of a Franchise Owner/Program Director is to establish the habits and personality that leads to success. It is true that there isn't just one way to do things, but statistics and probabilities don't lie. For a "mature" franchise system like Overtime Athletics that has been able to provide services over a lengthy period of time and in a variety of locations, what has emerged are trends that lead to the success of a Territory.

Here are components of the type of mentality a Program Director needs to cultivate to lead an expansion of the OTA Franchise System in a new territory:

- 1. PHONE > EMAIL** (*faster, more precise, clearer, eliminates question of "tone"*)
- 2. WHAT'S NEXT?** (*must look ahead to tomorrow, to next week, to next session*)
- 3. WWCWD / WWCHD** (*what would the Chris' do? Implement what you've been taught*)
- 4. KILL 'M WITH KINDNESS** (*with part-time employees, softer approach is more effective*)
- 5. SEE THE WHOLE BOARD** (*anticipate problems, seek confirmations*)
- 6. LEAD BY GETTING YOUR HANDS DIRTY** (*pitch in to serve your team*)
- 7. MAKE SURE THOSE YOU LEAD CAN FOLLOW** (*provide support to your team*)
- 8. GRIND IT OUT** (*put in the work*)
- 9. NO SHORTCUTS** (*no shortcuts*)
- 10. PRESENTATION IS EVERYTHING** (*parents do judge a book by its cover*)
- 11. FAILING TO PREPARE IS PREPARING TO FAIL** (*build a solid business foundation*)
- 12. DON'T F-UP THE SIMPLE SHIT** (*dot the I's and cross the T's*)
- 13. BE THE FIREFIGHTER** (*problem solve, seek and communicate solutions*)
- 14. WORK SMART** (*don't deviate, execute the system that has been outlined*)
- 15. RAPID RESPONSE** (*don't let issues linger*)
- 16. BE GREAT** (*includes being creative, caring about employees and customers*)

PD Goals

Striving for achievement (or specifically profitability in business) is ultimately the goal of running the Franchise Business. Just as in sports, there are a number of ways to measure whether or not success is being attained. Identifying goals is a tried and true method for climbing to the top and capturing the desired achievement. Small steps lead to bigger steps, moderate pace leads to faster results. Here are specific goals to strive for in a franchisee's pursuit of profitability.

1. Customer Service Satisfaction

- Rapid Response to PTA Coordinators and Program Contacts
- Address Parent Concerns Quickly and Appropriately – **Pursue Satisfaction**

2. Operational Management Improvement

- Maintain Appropriate Levels on Staff Roster
- Strive for better Instructor Evaluation and Education – **Focus on FUN**

3. Programming Goals – Multiple Revenue Streams

- After School Programs
 - New Partnerships
 - Retention Success
 - Volume/Enrollment/Revenue Increases (Session by Session Comparison/Improvement)
- Summer Session Camp Development
 - Investigation of Opportunities
 - Variety of Programming Options
- “Alternative Programming” Options Offerings
 - SPARK Program
 - Leagues and Clinics
 - Birthday Parties
 - Weekend Programming
 - One-Day Camps (Conference Days, MLK, Presidents Day, etc.)

4. Brand Awareness – Community Partnerships

- Reach out to each organization in Programming Territory
- Develop Contact
- Pursue Programming Relationship
- Examples:
 - YMCA's, Parks and Rec, Private Sports Complex, Gyms
 - Country Clubs, Churches/JCC's, Community Rec Centers
 - Community Pool/Tennis Park

Time Management

In order to achieve the desired goals, implementing time management strategies is essential. Because franchisees wear a lot of different hats, it is necessary to have strategies to make sure nothing is being missed and topics have an opportunity to be focused on. Overtime Athletics promotes the concept of “segmenting the workday”. This idea addresses priority and big picture. Territory Management requires good habits. What is outline below is a GAME PLAN for how Franchisees/Program Directors should organize their days.

Director Time Management

*Daily Goal: Do not end the day without completing/finishing... (fill in the blank and hold yourself accountable)

For any given topic, task, or problem, always ask:

*What’s the first step?

*What’s the next step?

Game Plan: Daily Segments

1. House Keeping:

- Voicemail
- In-box
- Clear Desk/Establish To Do’s (Business and Programming)
- Open and Scan THE BOARD

2. Programming Review:

- Set THE BOARD
- Customer Service

3. Staff Management:

- IHT
- Operational Needs

4. Brand Support:

- Sales/Retention
- Marketing
- Next Session Prep
- Promoting Brand

5. Research and Projects:

- List of “Big Picture” Tasks

PD Notes

A preview of the different aspects that will come up during the course of a day, week, or session are outlined below. These are an example of some of the items that will be plugged into the categories above that represent the Daily Segments. These five Daily Segments cover all aspects of territory management.

Summary of Schedule, Appointments, and Tasks

- Sales Target Pursuit
- Customer Service Management

- Interview Appointments
- Background Checks
- Hiring Appointments
- Training Appointments

- The Hub – OTA Software Maintenance

- Instructor Information Sheet Updates
- Programming Board Updates

- STAFF Heads Up
- Staff Meetings
- Instructor Cont. Training

- Timesheets
- Payroll
- Billing

- Instructor In-Class Evaluations
- Staff Friday Emails – Check In's and Thank You's

- Weekly Operational Reviews
 - PD Agenda, Purchase Report
 - Customer Service Spreadsheet
(Top Gun Partners, Code Red Classes, Instructor Shit List)

- PD Projects
- Director Spreadsheets:

Program Stats, Staff Ranking, Alternative Division, Instructor Demographic, Customer Service Spreadsheet, Kill'm with Kindness Budget, After School Margins Report, Online Surveys, Program Status Report

Emergency Procedure

One of the cornerstones of the Overtime Athletics Franchise System is being prepared. Preparation in sales, preparation in operations, preparation in staff management, preparation in customer service are all focuses and goals of the system. Nowhere is this preparation more key than in emergency response. All businesses should have protocols for emergency response, but none more than services that deal in childcare and interacting with youth participants... especially in an athletic setting where of course injuries can take place due to participation in sports activities.

Emergency response should be considered on day one of business operations. Protocols should be relayed to any individual that might be involved in the process. It is also key to understand that no one needs to proceed as though they are on an island. Our franchise system includes support from HQ and your own developed network which should include insurance and legal resources will provide you with the proper steps to handle emergencies once the situation has been defined.

The Emergency Procedure outline here is not the same protocol one would use for “minor situations”. Situations involving everyday difficult behavior from kids, like teasing, disrespect, cheating, etc. do not require the detailed steps we have here. As youth professionals, you know the difference and what type of response is needed for different behavioral incidents or physical injuries. A bruised elbow, bloody lip, twisted ankle – though require an incident report – most likely don’t require the thorough emergency response steps that follow.

This emergency procedure should be implemented for the following scenarios:

1. Serious Physical Injury
 - Head/Neck, Broken Bones, Stitches, etc.
2. Inappropriate Contact between Instructor and Youth Participant
 - Verbal Abuse, Physical Abuse, Molestation
3. Excessive or Violent Behavior from Youth Participants
 - Excessive Bullying, Racism, Threats, Fights, Weapons, etc.
4. Inappropriate Interaction between Employees
 - Verbal Intimidation/Harassment, Physical Altercation, Online/Cyber Harassment, Sexual Harassment

What follows is the Emergency Procedure that should be implemented once you have been notified of the incident. It’s important to remember to respond quickly even if it’s just to acknowledge that you are aware of what has been reported.

OTA Emergency Procedure

***When the email exchange, call, or meeting takes place, follow these steps:**

Step 1 – **Listen**

- Record Details
- Avoid Being Defensive
- Demonstrate Concern
- Reassure our VALUES, POLICIES and PROCEDURES

Step 2 – **Communicate**

- Information Gathering Procedure (how you will find out details)
- Timeline for Follow Up (when you will report back)
- Method of Follow Up (how you will report back – call, email, etc.)

Step 2 ½ - **Investigate**

- Speak with necessary individuals as it relates to incident
 - Instructors, Participants, Contacts, Parents, etc.
 - Record Details / Complete/Collect Incident Reports

Step 3 – **Outcome**

- Develop Plan to Resolve Issue
- Decision on Legal/Insurance actions?

Step 4 – **Follow Up**

- Communicate to all parties Solution and Resolution
- Achieve Confirmation and Agreement/Understanding

Step 5 – **Closure**

- Partnership Re-evaluation (does OTA want to continue to partner – who is it up to?)
- Customer Service Needs? (does anything need to be done for parents or participants)

REMEMBER!

***Don't Guarantee *Don't Promise *Don't Lie *Keep Your Perspective *Don't Worry About It**

****It's OK to say, "I don't know."***

Organization and Accountability

In order to stay “on course”, Overtime Athletics has created mechanisms to track progress, stay organized, and be accountable to the franchisor, brand, and customers. These organizational tools should be utilized on a daily and weekly basis.

Closing out the programming week on Fridays is an opportunity to review priority topics and gage progress and “To Do’s”. OTA uses a To Do list format we call the **PD Rundown**:

PD Rundown:

- **I-H-T Report:**
 - **Applicant Screenings:**
 - **Interview:**
 - **Hire:**
 - **Train:**

- **Program Management**
 - **Staffing Assignments (Schedules):**
 - **Looking Ahead - Program Board Issues/Concerns:**
 - **Equipment and Gear:**
 - **Program/Instructor Evaluations:**

- **Staff Management**
 - **Monday Head’s UP:**
 - **Instructor Check ins:**
 - **Cont. Training:**
 - **Staff Meetings:**
 - **Player of the Game:**
 - **Kill’m With Kindness Report:**

- **Business Management**
 - **Timesheets/Payroll Confirmations:**
 - **Payroll Spreadsheet:**
 - **Office Needs:**

- **Customer Service Needs**
 - **Customer Service Spreadsheet:**
 - **Marketing Strategy:**
 - **Service Recovery Need and Strategy:**

- **Tasks/Projects Update:**

- **Other:**

**These topics are a template and can be adjusted or added to as needed*

Here is a SAMPLE of a completed PD Rundown.

Couple Things to Note:

- It's just a reference point, doesn't need to include significant detail on any topic. Those notes should be compiled in other places like your "work note pads" or Laptop Notes.
- You will notice that many of these headings correlate to how Franchisees should segment their workdays.

PD Rundown:

- **I-H-T Report: Instructor Roster Goal is 25, currently at 22**
 - Applicant Screenings: 6
 - Interview: 3 appointments
 - Hire: 2 appointments
 - Train: 1 appointment
- **Program Management**
 - Staffing Assignments (Schedules): will send out by Friday
 - Looking Ahead - Program Board Issues/Concerns: Ox Ridge Cheerleading
 - Equipment and Gear: placed order, also need name badges
 - Program/Instructor Evaluations: observed Kemp, Holmes, Beach Tree
- **Staff Management**
 - Monday Head's UP: emphasize Punctuality and Dismissal
 - Instructor Check ins: 100% this week
 - Cont. Training: instructors must submit 1 quiz this week
 - Staff Meetings: rookie instructor meeting on 9/25
 - Player of the Game: NA
 - Kill'm With Kindness Report: gas card to AB for travelling to Brookfield
- **Business Management**
 - Timesheets/Payroll Confirmations: completed
 - Payroll Spreadsheet: completed, issue with BC paycheck, will discuss in Call
 - Office Needs: printer ink, folders
- **Customer Service Needs**
 - Customer Service Spreadsheet: Updated
 - Marketing Strategy: 2 yard signs at each elementary school - DONE
 - Service Recovery Need and Strategy: request t-shirts at Kemp for OTA missing class
- **Tasks/Projects Update: updated territory statistics**
- **Other: Athletic Director and Franklin High School has inquired about a summer camp. Need to discuss.**

The Customer Service Spreadsheet is designed to make sure Franchisees/Program Directors have their finger on the pulse of a program session. This spreadsheet can be used during school year ASP sessions (Fall, Winter, Spring) as well as during the Summer Camp Season.

At the beginning of each session, this spreadsheet should be updated with the ACTIVE partners. This means that programming will or is currently underway at the partnership (school, facility, etc.). For example, if you work with an elementary school in the fall, but during the winter they are not offering any OTA programs, then the school should be listed on the fall Customer Service Spreadsheet as a Partner, but not during the winter one. It's also recommended that this spreadsheet "build out" from week to week. This refers to adding a NEW TAB in the spreadsheet document for each week of the session. You will copy and paste the spreadsheet each week into the new tab and clear any contents that are no longer relevant to the current week of programming. This allows Franchisees/Program Directors to track the evaluations, feedback, issues, and solutions throughout the session.

The Customer Service Spreadsheet has three categories:

1. Session Partners (explained above)
2. Instructor Shit List (problems, repercussions, solutions, follow ups)
3. Code Red Partners (problem, solution, follow ups)

Session Partners category is a way to keep track of Observations and Check ins. This can include both on-site evaluations and emails or phone call check ins with Program Contacts. It is so important to physically attend as many programs as you can to demonstrate to staff and customers that you are on top of the situation. It's important to have firsthand knowledge to determine the abilities of employees and to truly gauge the type of feedback being reported to you. It doesn't mean evaluations need to be from start to finish of each class, but "popping in" is just as important and effective to maintain oversight. As you build out the Customer Service Spreadsheet from week to week and notice attention has not been given to a certain partner with an observation or check in, it's an indication that it is time to do so.

The Instructor Shit List is a way to keep track of an employee that isn't performing to high enough standards of the Job Description. Issues to note here could include a complaint about the instructor from a parent or program contact – mean, low energy, unorganized. Notes could include professionalism issues like lateness, not being in uniform, un-pumped up equipment. Or it could be a note on payroll problems or submitting inaccurate timesheets. If an instructor consistently appears on the Shit List – it's time to make a change.

Code Red Partners more often than not will be related to an instructor being on the Shit List. It's not necessary to list a program here for some minor hiccup. This category is intended to note a program or partner that needs immediate attention, or a course correction designed to maintain the business and satisfy a customer concern. Retention is so important in youth programming and recovering from an issue that has come up can be the difference in a business thriving or fading away.

		CUSTOMER SERVICE SPREADSHEET	
Territory:			
Week of:			
		Session Partners	Observations and Check In's
	1		
	2		
	3		
	4		
	5		
	6		
	7		
	8		
	9		
	10		
		Instructor Shit List	Problem/Repercussion/Solution/Follow Up
	1		
	2		
	3		
	4		
	5		
	6		
	7		
	8		
	9		
	10		
		"Code Red" Partners	Problem/Solution/Follow Up
	1		
	2		
	3		
	4		
	5		

Here is a SAMPLE of a completed Customer Service Spreadsheet.

Couple Things to Note:

- It's just reference points – further detail will most likely be documented in Outlook through email threads.
- Businesses need to be accountable and this weekly record of the programs performance is vital for staying on track and meeting the expectations of partners and parents.

CUSTOMER SERVICE SPREADSHEET			
Territory:	Fairfield County		
Week of:	9/25		
	Session Partners	Observations and Check In's	
	1 Bellows	9/20 – Great First Day	
	2 Franklin	9/20 – Instructor Late	
	3 Colvin Run	9/21 – Instructor had wrong equipment	
	4 Meadow Springs	9/21 – Great Class	
	5 Ox Ridge	9/22 – Need extra instructor	
	6 Royle	**Difficult Coordinator	
	7 Arlington	Hasn't started yet, need enrollment number	
	8 Milton	9/23 – Good Class	
	9 Casper	9/24 – Average Class, needs improvement	
	10 Garden Park	**Very Supportive Coordinator	
	Instructor Shit List	Problem/Repercussion/Solution/Follow Up	
	1 AB	Late to class, given warning (text to confirm)	
	2 CD, ZZ	Combined class without permission	
	3 EF	Off Radar – need to replace	
	4 GH	Parent complaint – instructor mean	
	5		
	"Code Red" Partners	Problem/Solution/Follow Up	
	1 Franklin	Two Class with late instructor	
	2 Ox Ridge	Coordinator emailed saying class needs additional instructor	
	3 Colvin Run	Parent complaint that the Basketball class has turned into all dodgeball	
	4		
	5		