

Franchisee Start Up Guide



H.I.G.H. F.I.V.E.S.

Start Up Guide Overview

Welcome to the OTA Family! We found that you would be a good fit for our Franchise System, and at the same time, you decided that the Overtime Athletics franchise opportunity was the best fit for you! You have joined a unique system in the franchising arena. As you go through this start up guide, you will see that the information is presented so that you can grasp the scope of the process. This Start Up Guide has been developed as a resource to provide Franchisees with a general understanding of the policies, procedures and rules that must be followed while working with Overtime Athletics. You should read through the entire manual from the beginning. Understand that no manual can answer every question. Our journey together will include our Franchise Support Team being with you every step of the way and your questions will begin to be addressed during your training visit to OTA Headquarters.

Let the games begin!

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INTRODUCTION

Letter from the Founders

Dear OTA Franchisee:

Welcome to Overtime Athletics, the leading provider of youth athletic activities. You have been selected to our team in order to participate in our mission *To Give H.I.G.H. F.I.V.E.S.* This is our never-ending pursuit of creating an organization and programming environment that embraces the themes of:

- **Health, Involvement, Growth, Happiness, Fun, Instruction, Value, Enrichment, Safety**

Just as in sports, our business model requires teamwork. Recognizing our customers fall into several different categories (students, parents, schools, PTA's, community partners), requires us to embrace flexibility and to focus on results. It is our desire that the Overtime Athletics experience is rewarding for all. You can help us achieve this by caring about our brand, your team, and program participants.

We also care a great deal about you. Our main goal is to help you develop your skills to achieve your maximum potential and to support you in your efforts to deliver on our mission *To Give H.I.G.H F.I.V.E.S.* to the members of your programs. This will allow us to build a strong network and achieve higher levels of effectiveness. A positive work ethic and a caring attitude towards OTA's customers and each other are essential to maximize our efforts in making Overtime Athletics an enjoyable and rewarding experience for everyone.

Youth athletic activities are a rapidly growing commercial enterprise. The competitive market will offer exciting challenges to all of us. The competitive bar is always rising, and we continually strive to implement new levels of quality experiences and innovations in the athletic programming sector.

Thank you for choosing to be a part of Overtime Athletics. We are always available to listen to your questions or concerns. We look forward to working with you.

With appreciation,

Chris Whelan and Chris Horich

Founders

ORGANIZATION OVERVIEW

Business Overview

Overtime Athletics is a company specializing in youth athletic programming for elementary school students. The company's inception revolves around the basic idea that athletics serve as a vehicle for fitness, self-esteem, team work, and a variety of other ideas and concepts that today's youth need to embrace before embarking on healthy teenage and adult years. After school programming, Summer Camps, Birthday Parties, Specialty programming (Conference Day Camps, School Break Camps, Field Days) are all divisions of our organization requiring top notch curriculum, instruction, safety, and customer service.

Mission Statement

To give H.I.G.H. F.I.V.E.S.!

Health:

To introduce to participants how to lead a healthy lifestyle, by focusing on mind, body, and spirit.

Involvement:

To engage participants in physical activity and provide social opportunities with peers through sports.

Growth:

To guide the development of our participants in the lessons sports has to offer its participants.

Happiness:

To provide a positive experience through games and interaction.

Fun:

To incorporate excitement, joy, and inclusiveness.

Instruction:

To expose participants to skill development and practice in order to learn the fundamentals of the games.

Value:

To provide quality instructors, quality equipment, quality curriculum, and quality customer service.

Enrichment:

To implement an environment of sports and games for kids to practice reasoning skills outside of a traditional classroom setting.

Safety:

To uphold the company standards as it relates to playing sports, participants interacting with each other, and instructors interacting with participants.

Management Principles

- **Applying Athletic Principles to Business**
 - On the field and in the gym we have learned “practice makes perfect”, “keep your eye on the ball”, “step up to the plate”, “don’t fumble”, “be a team player”, “take one for the team”, “knock it out of the park”, “anticipate the next play”, “see the whole field”, “talk is cheap”, and “stats don’t lie”. All of this has taught us that in our business we must constantly apply the themes of: *repetition, focus, leadership, accountability, work together, sacrifice, succeed, look ahead, be aware, results matter, and evidence supports production - to achieve our goals.*
- **Presentation is Everything**
 - We must be prepared and make sure our first impression is a positive, lasting, and duplicable one. It’s important that we look and act like what our customers are being promised in program descriptions so that our Brand can flourish.
- **Be a Firefighter**
 - Solve the problem. Make sure customers are being heard, and that we are sympathizing with their issues. Focus on solutions and seek outcomes we can be proud of. At the same time, make sure colleagues and staff are given a platform and a vehicle to communicate their thoughts and the respect to arrive at resolutions amongst our own team.
- **Touch All The Bases**
 - Shortcuts lead to carelessness, sloppiness, and poor service. Train your team thoroughly and be sure to record all information, data, and completed steps for our procedures.
- **Pitch In**
 - We believe in leading by example. Roll up your sleeves and join the struggle. Demonstrating to staff and customers that whatever it takes to get the job done is what we will do to achieve our desired results is contagious and will create a culture of support and shared goals.
- **Rapid Response**
 - Lingering issues, concerns, problems are cancerous to our business and will reflect upon the organization as a whole. We have a responsibility to each other to quickly address problems and rapidly respond with solutions.
- **Kill’m with Kindness**
 - Caring about people and treating others with kindness and respect is a proven formula for success. Whether in management or service, be polite, be friendly, and be kind.
- **Be Great**
 - It’s simple, if you’re going to do something, you might as well do it great.

CODE OF CONDUCT

Business Ethics

Our ethical principles are the values that set the ground rules for all that we do as members of the Overtime Athletics team. As we seek to achieve responsible commercial success, we will be challenged to balance these principles against each other, always mindful of our promise to the mission of Overtime Athletics.

The Ethical Principles Are:

- **HONESTY:** We will not say things that are false. We will never deliberately mislead. We will be as candid as possible, openly and freely sharing information, as appropriate to the relationship.
- **PROMISE-KEEPING:** We will go to great lengths to keep our commitments. We will not make promises that can't be kept and we will not make promises on behalf of the Company unless we have the authority to do so.
- **FAIRNESS:** We will create and follow a process and achieve outcomes that a reasonable person would call just, evenhanded, and the right thing to do.
- **RESPECT FOR OTHERS:** We will be open and direct in our communication, and receptive to those with questions and concerns. We will honor and value the abilities and contributions of others, embracing the responsibility and accountability for our actions in this regard.
- **COMPASSION:** We will maintain an awareness of the needs of others and act to meet those needs whenever possible. We will also minimize harm whenever possible. We will act in ways that are consistent with our commitment to social responsibility and being a community partner.
- **INTEGRITY:** We will live up to OTA's ethical principles, even when confronted by personal, professional and social risks, as well as economic pressures.

Athletic Ethics

All members of Overtime Athletics will treat players and participants as individuals, remembering the large range of emotional and physical development for the same age group. Overtime Athletics does our best to provide a safe playing environment and situation for participants. We strive to organize classes, programs, practices, clinics, and camps to be inclusive, fun, energetic and challenging. Always leading by example in demonstrating fair play and sportsmanship is our guiding principle and centerpiece for conducting youth activities. Being knowledgeable in the rules of the sports and games we oversee, teach, and coach is an important factor in the success of our programs. Understanding those coaching techniques appropriate for each of the skills we teach and the age groups we interact with provides the framework for reaching our goals of being the leading provider of youth athletic activities. We will always remember that as youth sports providers, that the game is for children and not adults. We will listen to any complaints parents or players may have and respond fairly with care and respect. Respecting the games and each other will define success for Overtime Athletics.

IT'S IMPORTANT TO

REMEMBER	
GOAL	Meaning/Why?
Deliver Consistency	Want to be a successful franchisee? It's simple. Deliver a consistent level of quality service, again and again. Sounds simple, but very few people or companies do it well.
Protect the Brand	The company is only as good as its brand. Protect it. If you see a fellow franchisee abusing it, let them know how you feel and notify us right away.
Be Honest and Up Front	Above all, be honest with people.
Communicate	Communicate clearly with everyone you come into contact with, whether it's our customers, employees, fellow franchisees, and of course, us!
Respect Others	Respect each other's opinions and viewpoints, especially your customers. Put yourself in other people's shoes.
Create Culture of Continuous Improvement	Always look to do things better. Set an example of what we are all about. You can learn so much by seeing, listening, and integrating specific feedback about individual and company performance.
Lifetime Learning 24/7	Learning didn't end in School. Successful people always look to improve their knowledge base. What good reading materials or books have you read lately?
Get The Word Out	Go out in the community and make yourself known. Be active in community service organizations. Not only is it the right thing to do, but it's an inexpensive way to build business in the long run.
Enjoy Your Work	It's important that you enjoy what you are doing. You only live once. We strive to bring fun and energy to our work. Make time for spiritual, creative and artistic endeavors. It will help you perform better at work.

YOUR TEAM

Any path to greatness and to success should probably include the following:

Step 1 – Admit you don't know everything

Step 2 – Ask for help

Step 3 – Listen

It's important that you work to develop a team of support. Overtime Athletics is a huge part of your team, but you need to build out the rest of your "starting lineup".

1. Legal Expertise
2. Insurance Expertise
3. Accounting and Tax Preparation Expertise
4. Banking Expertise
5. Payroll Expertise
6. Technology Expertise
7. Marketing and Graphic Design Expertise

Having access to the above areas of intellectual support can't be overstated. The entrepreneurial experience is filled with pitfalls and obstacles on the way to success. Being able to access resources that can guide, advise, mentor, or provide tangible support will make your journey easier. Intellectual resources can be costly. It is your responsibility to protect your business, yourself, and the Overtime Athletics Brand. You are going to want to take a look at your network and begin to put YOUR TEAM together to help accomplish this.

Overtime Athletics – 15+ Years and Running



Overtime Athletics (OTA) has established itself over the past decade (and more) as one of the premiere After School Enrichment providers in the country. As OTA continues to expand and provide other opportunities, our mission has never changed, “To give H.I.G.H. F.I.V.E.S (Health, Involvement, Growth, Happiness, Fun, Instruction, Value, Enrichment, Safety).” The idea has always been to provide consistent youth sports programming that focuses on getting kids to PARTICIPATE, MOVE and PLAY! Sportsmanship and Fair play have always remained the centerpieces of our systems of programming.

- In the fall of 2003 the program was started by three young men whose passion for sports and youth programming collided to form Overtime Athletics. In Darien, Connecticut OTA first introduced its brand of affordable, safe, and fun after school athletic programming for elementary school students.
- Geographical Expansion Timeline:
 - 2003 – CT
 - 2004 – NY
 - 2005 – VA (Northern)
 - 2006 – MD
 - 2007 – VA (Richmond)
 - 2008 – PA
 - 2009 – MA
 - 2010 – GA
 - 2011 – NJ
 - 2012 – NC
 - 2013 – CA
 - 2014 – CO
 - 2015 – WA
 - 2016 – ILL
 - 2017 – DC (Washington)
 - 2018 – FL

- Program Expansion (types of classes):
 - OTA started in 2003 with a catalogue of traditional sports: Soccer, Basketball, Flag Football
 - In 2004 we introduced our most popular program – Sports Spectacular, a variety class that fits the interests and needs of every type of kid
 - Over the years we have expanded to a programming catalogue of over 20 different athletic activities (both traditional sports and playground favorites)

- Service Expansion (divisions of the company):
 - After School Athletic Programs
 - Sport Specific Summer Camps
 - Traditional Summer Day Camps
 - Birthday Party's
 - Basketball Clinics
 - Flag Football Clinics
 - Elementary School Field Days
 - Flag Football Leagues
 - Coaches Clinics
 - AAU Basketball Teams

- Number of kids that have been through our programs in our 15+ years of business
 - **Over 100,000 kids have participated in Overtime Athletics Programs**

- Number of Programs we have offered in our 15+ years of business
 - **Overtime Athletics has run over 10,000 programs**

Why Overtime Athletics?

- Organization and a Formula for each class being high energy, fast paced, disciplined, and fun separate OTA from other youth sports providers. Our instructors utilize the signature Overtime Athletics Curriculum and are required to PREPARE their GAME PLANS for each day of programming.

- After 15+ years of continued growth and expansion, Overtime Athletics has stayed true to its philosophy and goal of trying to reach EVERY child possible through our After School Programs, Camps, Birthday Parties and Leagues.

- OTA Continues to motivate and encourage people to embrace a healthy and fit lifestyle at an early age while learning the rewards of teamwork and **FUN**damentals of all sports!!



Job Description:

Title: Overtime Athletics PROGRAM DIRECTOR (PD):

The Overtime Athletics Program Director is the Sales and Operational Manager for our after school programs. This person will be responsible for researching potential programming territories, launching new territories by developing relationships with community partners and signing up programs, as well as participating in the servicing of Overtime Athletics' youth athletics programs. Success in expanding our programs includes acquiring new schools to participate in our network of after school programs; advertising and marketing our programs; and providing customer service. This person will be responsible for maintaining, implementing, and servicing Overtime Athletics' youth athletics programs. Success in managing these programs includes recruiting, hiring, training, and managing a staff of Instructors; scheduling Instructors; and providing logistical support and customer service to enhance relationships with current partnerships.

Job Logistics:

- Full Time

Job Requirements:

- Experience working with children

Working Conditions:

- Establish a "Mobile Office"
- Transportation required to meet with staff and be on-site for program evaluations

Physical Demands:

- Applicant must be capable of participating in rigorous, high energy athletic coaching indoors and outdoors
- Must maintain a professional appearance in order to achieve our goals of providing the highest quality of customer service

Job Duties: Execute ALL Directives in OTA Systems Manual

- Investigate OTA Territories for New School Partnerships
- Develop New Summer Camp Partnerships
- Manage OTA Customer Service Program
- Create, collaborate, and execute OTA Marketing Strategy
- Quality Control Support (seeking out feedback from Coordinators, Instructors, Parents)
- Develop Relationships with PTA Coordinators/Principals/Community Organizations/Etc.

- Retention of Existing Partnerships
- Investigation and Pursuit of New Partnerships in Existing Programming Territories
- Manage On-Line Registration
- Online Registration/Program Flyers/Database Management
- Program Development – Additional Streams of Revenue
- Management Training and Evaluation
- Quality Control
- Community Outreach
- Manage Hiring and Training System / Instructor Clearances
- Schedule Instructors
- Manage Daily Program Board
- Staff Development (Continuous Training)
- Execute Staff Incentive Plan
- Maintain Payroll Spreadsheets
- Program and Staff Evaluation
- Equipment and Gear Logistics

Program Director/Coordinator Guidelines

Introduction

The Director position with Overtime Athletics is one that requires professionalism, detail, communication and enthusiasm. The following are some guidelines to review in order to further understand the expectations of our company and what it takes to lead our team in your respective role and territory. It is your mission to carry out the HIGH FIVES mission of the company with passion, precision and honor.

Meeting with Instructors and Coordinators

It is the Director's responsibility to establish a meeting site with staff and coordinators. This is not to take place in the Director's home. The meeting site should be consistent, conducive to professional exchanges and convenient for the staff/coordinators. Take into consideration table space and chairs, the number of instructors or applicants that might be meeting with you, and the surrounding environment (other people, types of activities that could be going on around you).

Training for Instructors

It is the Director's responsibility to establish a training site for staff. This is not to take place in or at the Directors home. This space does not need to be consistent. You should have options for indoor and outdoor training sites. Remember that training sessions will be conveying athletic concepts and on occasion requiring some interaction of the staff in an athletics manner. The space should reflect those needs.

Staff Interaction

It is important to remember that the Director's sets the tone for the professionalism and respect that the staff will have for you, Overtime Athletics, and our Clients. Here are a few reminders to make sure that boundaries are clear and respected:

- No Dating the staff
- Staff may not come to Director's home
- No alcohol provided to the staff
- No drinking with the staff

Appearance

The Director must maintain a neat and clean appearance regardless of situation. Whenever meeting with staff or client, you must dress professionally for the situation (khaki's and a collared shirt). If you are in an athletics setting, you should dress accordingly, while still maintaining a neat and organized look. Please do not wear anything in an athletic setting that would create a safety problem (i.e. - jewelry that might get in the way). It is important to promote our organization through your appearance and in doing so wearing Overtime Athletics clothing/gear is important to do when interacting with staff or clients.

In Class Involvement

Directors must participate in Overtime Athletics programming regularly whether it be running a class, teaching instructors, or observing.

Community Outreach

Directors will be encouraged to outline a volunteer/outreach plan for Overtime Athletics (and to some extent their staff) in the territory they are managing.

Coaching

The Director may pursue opportunities to coach youth athletics outside of the Overtime Athletics arena.

Job Description:

Title: Instructor

An OTA Instructor Must:

- Have experience working with kids
- Be comfortable working in an athletic setting
- Have some knowledge of sports
- Be available to work afternoons, generally between 2-5pm
- Have your own transportation
- Be punctual
- Be professional
- Be patient
- Implement high-energy and fun classes

Work Environment:

- This is a part-time position. Most instructors work 2-3 days per week.
- Each class is 1 hour long. You are required to arrive 15 min early and stay 15 minutes after class (or until every child has been dismissed).
- It is 1.5 hours of work per day you are scheduled.
- You will use your own transportation to drive to the schools; OTA does not reimburse for gas or mileage.
- There are mandatory trainings and staff meetings.

Job Logistics:

- There will be a lead instructor and support instructor at each class
- Each instructor is responsible for their issued equipment bags
- Classes are split into grades K-2 or grades 3-5
- Classes are usually between 10-20 kids
- Pay is \$20 hour

Initial Training

Franchisee and Hired Staff attend Overtime Athletics training at our Headquarters in Reston, VA.

Overtime Athletics Headquarters

11741 Bowman Green Dr

Reston, VA 20190

Phone: 703.437.1200

To Schedule Training:

1. Confirm availability with OTA
2. Make travel and lodging arrangements based on the below information
3. Submit travel details to OTA

Travelling to Headquarters:

If travelling by plane, you should plan on flying into Washington-Dulles International Airport (IAD) or Ronald Reagan Washington National Airport (DCA) or Baltimore/Washington International Thurgood Marshall Airport (BWI).

OTA HQ is located approximately:

- 6.5 miles from IAD
- 23 miles from DCA
- 50 miles from BWI

Pick a flight that is convenient for travel. Use the address above for directions from airport to training site.

Timing:

Plan on arriving at least 1 day prior to the start of the training. This will give you a chance to settle in, rest up, and prepare for the training experience. Make sure to clear departure time with OTA if planning on leaving the last day of training.

Hotel:

There are several hotels in the area. You should stay in a hotel that is within a 15-minute drive of Overtime Athletics Headquarters. We recommend that you call the hotels in the area for further information and pricing.

Climate – Appropriate Clothing:

We are a professional organization and operate in a number of different settings (office vs. athletic). Please plan on being in business casual for the purposes of our office training sessions. We ask that you also bring athletic attire in order to participate in training in our athletic settings.

Look ahead to the weather scenarios during your training visit. The mid-Atlantic can be unpredictable depending on the time of year we are in with regards to temperature and weather. You should bring appropriate clothes depending on the time of the year.

Reston, VA

Reston, VA is in Fairfax County, VA which is about 22 miles from downtown Washington, DC. The Reston Town Center (located across the street from OTA HQ) features hotels, restaurants, shops and other entertainment: www.restontowncenter.com

Northern Virginia, commonly referred to as “NOVA”, is OTA’s largest programming territory. The areas notable features of the region include the Pentagon and the Central Intelligence Agency, and the many companies which serve them and the federal government. The area's attractions include various monuments and Colonial and Civil War-era sites such as Mount Vernon and Arlington National Cemetery.

Culture

Due to the proximity to the capital, many Northern Virginians go to Washington, D.C. for cultural outings and nightlife. The Kennedy Center in Washington is a popular place for performances, as is Wolf Trap National Park for the Performing Arts near Vienna. Jiffy Lube Live (near Manassas), the Patriot Center at George Mason University in Fairfax, and the Verizon Center in Washington serve as popular concert venues, and the Verizon Center also serves as the home of sporting events. Smithsonian museums also serve as local cultural institutions with easy proximity to Northern Virginia, and the new Udvar-Hazy center of the National Air and Space Museum in Chantilly is popular as well.

Tysons Corner Center ("Tysons I") is one of the largest malls in the country and is a hub for shopping in area. Tysons Galleria ("Tysons II"), its counterpart across Route 123, carries more high-end stores. Tysons Corner itself is the 12th largest business district in the United States. Other malls include Springfield Mall, Fair Oaks Mall, Manassas Mall, and The Fashion Centre at Pentagon City. Dulles Town Center is the region's newest mall, serving the eastern Loudoun County area. Reston Town Center is a high-density mixed-use retail, commercial, and residential development located just off the 267 Toll Road in Reston. Potomac Mills, located in Prince William County, is the largest outlet mall in the region. Northern Virginia is home to many activities for families and individuals, including biking/walking trails, sports leagues, recreation facilities, museums, historic homes, and parks.

Attractions

The region's large shopping malls, such as Potomac Mills and Tysons Corner Center, attract many visitors, as do the region's Civil War battlefields, which include the sites of both the First and Second Battle of Bull Run in Manassas. Old Town Alexandria is known for its historic churches, townhouses, restaurants, gift shops, artist studios, and cruise boats. The waterfront and outdoor recreational amenities such as biking and running trails (the Washington and Old Dominion Rail Trail leads all the way from tidewater Alexandria to the foothills of the Blue Ridge; the Mount Vernon Trail and trails along various stream beds are also popular), whitewater and sea kayaking, and rock climbing areas are focused along the Potomac River, but are also found at other locations in the Baltimore-Washington metropolitan area. Scenic Great Falls Park and historic Mount Vernon (which opened a new visitor center in 2006) are especially noteworthy.

Washington DC has several professional sports franchises including The Washington Nationals Baseball Team, The Washington Redskins Football Team, The Washington Wizards Basketball Team, The Washington Capitals Hockey Team, The DC United Soccer Team, and the Washington Mystics Women's Basketball Team.

Franchisee – Preview

Industry Overview

The After-School Program Providers industry organizes youth programs that take place outside of the traditional school day. After-school programs can occur at various times of the day and in a variety of places, including the school building, community centers, libraries or parks. Activities include everything from sports and study groups to performing and creative arts. The majority of industry programs are nonprofit operations that depend on government funding, donations and tuition fees to fund their programs. The cuts in funding over the last several years have led to a rise in privately operated vendors partnering with schools to offer their services. Youth Programming is a fast growing and competitive sector. Both the percentage and the total number of children in the United States participating in after-school programs and summer camps have been on the rise. There are low barriers to entry for after-school program providers but the challenge often lies in hiring enough qualified people to care for and supervise children who can provide excellent programming with properly prepared curriculum and access to quality equipment or supplies.

According to data from the Afterschool Alliance, in 2014, about 10.2 million children (18.0%) participated in an afterschool program, up from about 8.4 million (15.0%) in 2009. Moreover, there is still an enormous amount of unmet demand for industry services; according to the Afterschool Alliance, there are nearly 20.0 million children that would attend an after-school program if there were one available. In 2015, as demand for industry services remains strong and as disposable income grows, unemployment levels fall and government funding increases, industry revenue is expected to grow 3.0% to reach \$21.9 billion.

What to Expect

Starting a business can be very overwhelming. The personality that succeeds includes one that can focus on the big picture. Is able to organize and prioritize. Understands the concept of grinding it out (work ethic) and implements a time management approach that satisfies all the responsibilities of being in charge.

These themes are incorporated into your initial training. We will be focusing on the big picture and the formula required for consistency that has been the foundation for our brand. Your training days will be segmented to focus on different areas of the business. There will be opportunities to address questions, observe and then practice our processes, and to learn our best practices. Training is not easy. Days are long and require stamina and focus. What you put in, is what you will get out. Training areas will include: Sales, Program Management, Staff Management, Customer Service, Business Topics, Technology Platforms, and Marketing.

Success with Us

It's simple. Follow the system. No matter what region of the country, our program works because parents and children want the same things no matter where they are – fun, organized, professional, safe

experiences. Our model provides just that. The enemy to success is shortcuts. Franchisees that believe altering the system will produce better results because the shortcut seems easier, are not only violating the agreement, but are jeopardizing the brand and ultimately will produce weaker financial results.

Understanding the importance of clear communication and evidence for your actions (paper trail) is extremely important in order to be on the path to success. Business, management, and liability are all tied to communication.

Relentless – every area of our business should apply this theme. Sales, operations, and employee management all require an attitude or “whatever it takes.” Getting the job done properly and meeting the service needs of our customers is the only measuring stick that matters. Achieving this is what leads to financial success.

Defining Key Terms and Processes – Overtime Athletics

- **“ASP”** – Abbreviation for After School Program
- **“Program Director”** – Term used for Partners/Customers to refer to Franchise Owner or Operational Manager (abbreviation – PD)
- **“Program”** – A series of after school classes during a session
- **“Class”** – 1 afternoon of activity during the Program
- **“Session”** – OTA offers three sessions each school year (Fall, Winter, Spring)
 - OTA offers a “Summer Session” outside of the school year during the camp season
- **“Partner”** – School or Organization we provide programming for
- **“Instructor”** – Athletic coach (employee) of Overtime Athletics
- **“ASP Catalogue”** – List of Programs and Descriptions describing the sporting activities Overtime Athletics provides
- **“Programming Day Card”** – The format and lesson plan used by instructors to plan and run after school programs (abbreviation – PDC)
- **“IHT System”** – Overtime Athletics system for Interviewing, Hiring, Training Instructors
- **“Instructor Folder”** – Issued to each employee and is a collection of important policies, procedures, rules, and logistics for instructors to follow
- **“Instructor Info Sheet”** – Spreadsheet (roster) containing contact information, hiring, and training details for Instructors who work programs

- **“Staff Head’s Up”** – email containing announcements for staff (instructors) to be sent out on a weekly bases (mostly on Mondays before noon)
- **“Kill’m with Kindness”** – Instructor incentive and reward program to include “player of the game” (POG)
- **“The Board”** – Program Schedule organized by each day of the week for the session listing all programs/classes
- **“COI”** – Certificate of Insurance
- **“Incident Report”** – Document submitted by instructor(s) to Program Director should injury or behavioral issue occur during a class that needs to be recorded
- **“Handouts”** – Participant “take-homes” for participating in a program, often T-Shirt, Hat, Water bottle, etc.
- **“Sports Spectacular”** – The most common/popular After School Program offered in the OTA Catalogue. Best described as a “variety class”. The instructor alternates from week to week what sport is played

Overtime Athletics Social Media Policy

POLICY

This policy provides guidance for Franchisees use of social media, which should be broadly understood for purposes of this policy to include blogs, wikis, microblogs, message boards, chat rooms, electronic newsletters, online forums, social networking sites, and other sites and services that permit users to share information with others in a contemporaneous manner.

PROCEDURES

The following principles apply to professional use of social media on behalf of Overtime Athletics and Overtime Franchise as well as personal use of social media when referencing Overtime Athletics and Overtime Franchise.

- Franchisees need to know and adhere to the Company's Code of Conduct, Manuals and Handbooks, and other company policies when using social media in reference to OTA/OTF.
- Franchisees should be aware of the effect their actions may have on their images, as well as OTA's/OTF's image. The information that employees post or publish may be public information for a long time.
- Franchisees should be aware that OTA/OTF may observe content and information made available by members and employees through social media. Franchisees should use their best judgment in posting material that is neither inappropriate nor harmful to OTA/OTF, its employees, partners, or customers.
- Although not an exclusive list, some specific examples of prohibited social media conduct include posting commentary, content, or images that are defamatory, pornographic, proprietary, harassing, libelous, or that can create a hostile work environment.
- Franchisees are not to publish, post or release any information that is considered confidential or not public. If there are questions about what is considered confidential, Franchisees should check with Headquarters.
- Social media networks, blogs and other types of online content sometimes generate press and media attention or legal questions. Franchisees should refer these inquiries to OTA/OTF Corporate.
- If Franchisees encounter a situation while using social media that threatens to become antagonistic, Franchisees should disengage from the dialogue in a polite manner and seek the advice of OTA/OTF Headquarters.
- Franchisees should get appropriate permission before you refer to or post images of current or former employees, members, vendors or suppliers. Additionally, Franchisees should get

- appropriate permission to use a third party's copyrights, copyrighted material, trademarks, service marks or other intellectual property.
- Social media use shouldn't interfere with a Franchisees responsibility. Business computer systems are to be used for business purposes only. When using Business computer systems, use of social media for business purposes is allowed (ex: Facebook, Twitter, Company blogs and LinkedIn), but personal use of social media networks or personal blogging of online content is discouraged.
- Subject to applicable law, after-hours online activity that violates the Company's Code of Conduct or any other company policy may subject a Franchisee to disciplinary action or jeopardize the Franchise Agreement.
- If Franchisees publish content after-hours that involves work or subjects associated with OTA/OTF, a disclaimer should be used, such as this: "The postings on this site are my own and may not represent OTA/OTF's positions, strategies or opinions."
- It is highly recommended that Franchisees keep Company related social media accounts separate from personal accounts, if practical.

Social Media – Factors

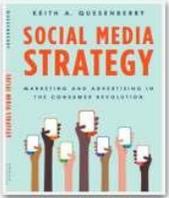
Etiquette and Ethics:

With 73% of the world’s Internet users active in social media, 83% of Fortune 500 companies with social media accounts and 92% of “customers” using social media to interact with companies in order to gain knowledge about products and services it is too important not to carefully consider your actions. Social media brings together our personal, professional and working lives in a way no other medium has before. How do we navigate this social landscape where our worlds collide and brands communicate like people in one-on-one conversations with consumers?

Etiquette is the proper way to behave and Ethics studies ideas about good and bad behavior. Both combine into Professionalism, which is the skill, good judgment, and polite behavior expected from a person trained to do a job that incorporates a social media aspect. Because social media blurs the lines between our personal and professional lives it is useful to look at actions in social media from three perspectives: Personal (as an individual), Professional (as a business owner) and Brand (as an organization). To simplify the discussion there are questions for each category in the Social Media Etiquette and Ethics Guide below:

SOCIAL MEDIA ETIQUETTE & ETHICS

Etiquette is the proper way to behave while **Ethics** studies ideas about good and bad behavior. Both combine into **Professionalism**, which is the skill, good judgment, and polite behavior expected from a person trained to do a job such as social media marketing. Because social media blurs the lines between our personal and professional lives it is useful to look at actions in social media from three perspectives: **Personal** (individual), **Professional** (current/perspective employee) and **Brand** (organization). How do we navigate a social landscape where our worlds collide and brands communicate like people in one-on-one conversations with consumers? **Before taking any social media action consider these questions (final applies to all):**



	Personal Social Action (As An Individual)	Professional Social Action (As A Current/Perspective Employee)	Brand Social Action (As An Organization)
1.	Is it all about me? <small>(Spend time complimenting not just boasting)</small>	Does it meet the Social Media Policy? <small>(Know/follow employer/client requirements)</small>	Does it speak to my target market? <small>(Meets their wants and needs not yours)</small>
2.	Am I stalking someone? <small>(Don't be too aggressive in outreach)</small>	Does it hurt my company's reputation? <small>(Personal accounts represent your employer)</small>	Does it add value? <small>(Make it educational, insightful, entertaining)</small>
3.	Am I spamming them? <small>(Don't make everything self-serving)</small>	Does it help my company's marketing? <small>(Be an advocate for your brand in social)</small>	Does it fit the social channel? <small>(Fit environment, mission, policies/standards)</small>
4.	Am I venting/ranting? <small>(Do not post negative comments or gossip)</small>	Would my boss be happy seeing it? <small>(Even private accounts are never fully private)</small>	It is authentic and transparent? <small>(Don't hide or exclude anything relevant)</small>
5.	Did I ask before I tagged? <small>(Check before you tag people in photos)</small>	Am I being open about who I work for? <small>(Be transparent about financial connections)</small>	Is it real and unique? <small>(Don't use auto responses, or spam)</small>
6.	Did I read before commenting/sharing? <small>(Don't jump to conclusions)</small>	Am I being fair and accurate? <small>Criticism is constructive backed by evidence)</small>	Is it positive and respectful? <small>(Don't badmouth the competition/customers)</small>
7.	Am I grateful and respectful? <small>(Respond and thank those who engage)</small>	Am I being respectful not malicious? <small>(Don't post what you wouldn't say in person)</small>	Does it meet codes of conduct? <small>(See WOMMA Code of Ethics, etc)</small>
8.	Is it the right place for the message? <small>(Some messages should be given in person)</small>	Does it respect intellectual property? <small>(Get permission to post brand/client content)</small>	Does it meet all laws and regulations? <small>(See FTC Social Guidelines, etc)</small>
9.	Am I in the right account? <small>(Don't post personal info. on brand accounts)</small>	Is this confidential information? <small>(Do not disclose non-public brand/client info.)</small>	Does it meet the Social Media Policy? <small>(Follow your own organization's standards)</small>
10.	Have I listened twice as much as I am talking? <small>(We have two ears and one mouth for a reason)</small>		bit.ly/QuesenberryFreeSample

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Personal Social Media Use:

The top types of content that turns social media observers off should not surprise you: Inappropriate photographs, videos, drinking/using drugs, discriminatory comments, bad-mouthing a previous company or fellow colleague/employee, and poor communication skills. What about ranting? Rants blow off steam and make you feel better right? Research has found people's moods decline after reading rants, and after writing rants they became angrier, not less.

Before you post or comment in a personal capacity consider:

1. **Is it all about me?** No one likes someone who only talks about themselves. The same applies in social media. Balance boasting with complimenting.
2. **Am I stalking someone?** It is good to be driven and persistent but be careful not to cross the line into creepy. Don't be too aggressive in outreach.
3. **Am I spamming them?** Not everything or even the majority of what you post should ask for something. Don't make everything self-serving.
4. **Am I venting or ranting?** Venting and ranting may feel good, but research says it doesn't help and no matter how justified you feel, it never presents you in a positive light. Do not post negative comments or gossip.
5. **Did I ask before I tagged?** You had a great time and want to share those memories, but your friends, family or organization may have different standards. Check before you tag people in posts.
6. **Did I read before commenting or sharing?** Don't make yourself look foolish by not fully reviewing something you are commenting on or sharing with others. Don't jump to conclusions.
7. **Am I grateful and respectful?** Don't take people for granted. Respond and thank those who engage with you.
8. **Is this the right medium for the message?** Not everything should be said in social media. Consider the feelings of the other person. Some messages should be given in person, by phone or email.
9. **Am I logged into the right account?** There are too many corporate examples of embarrassing posts meant for personal jokes that went out on official brand accounts. Always double check which account you are on. Don't post personal information on brand accounts.

Professional Social Media Use

As seen above, social media has blurred our personal and professional lives. As a business owner you should consider how your social media use impacts your company and brand. Not only should your social media not hurt the company, but many companies today see your active personal social media use as a medium of advocacy for the brand. Also, anything you post now may impact your professional image as a potential partner of another company or organization.

Before you post or comment as a professional consider:

1. **Does it meet the Social Media Policy?** Make sure you know and follow brand or partner requirements.
2. **Does it hurt my company's reputation?** No matter how many disclaimers you put on your accounts such as "views are my own" certain content and behavior will negatively impact your brand. If your bio states where you work, your personal account represents your brand.
3. **Does it help my company's marketing?** Advocacy is an important strategy. Have a positive impact on your company's image and when you can advocate for your brand in social media.
4. **Would my partners/customers be happy to see it?** You may not have "friended" your partners or customers but someone else may have and your post is only a share or screen grab away. Even private accounts are never fully private.
5. **Am I being open about who I work for?** It is good to post positive content about your brand and it is nice to receive gifts, but if you are trying to pass it off as unbiased opinion that is wrong. Be transparent about your financial connections.
6. **Am I being fair and accurate?** Everyone is entitled to their opinion, but if your opinion tends to always be unfounded and seems to have an agenda it will reflect negatively upon you. Criticism is welcome when it is constructive, and opinion is backed by evidence.
7. **Am I being respectful and not malicious?** People can get very insensitive, judgmental and angry in social media posts. That does not convey a professional image. Don't post what you wouldn't say in person. Even an outburst in person fades in memory, but a malicious post is there forever.
8. **Does it respect intellectual property?** Not everything on the Internet is free. Check for or get permission to post company or partner brand assets and content.
9. **Is this confidential information?** You are granted access to privileged and confidential information. Don't assume it is fine to share. Do not disclose non-public company or client/customer/partner information.

Brand Social Media Use

For those who are responsible for creating and sharing brand social media content there are additional considerations to ensure you are helping to meet business goals and following laws and regulations. With 92% of S&P 500, 100% of Dow Jones companies active on social media and 91% of retail brands using two or more social channels chances are your company is participating in social media through brand accounts.

Before posting or commenting as a brand on a social media account consider:

1. **Does it speak to my target market?** Social media is unique from traditional marketing and requires a different perspective to be effective. Be sure to focus on your target's wants and needs not yours.
2. **Does it add value?** Social media only works if people view and share it. Make your content educational, insightful or entertaining to grab interest and draw engagement.

3. **Does it fit the social channel?** Don't post content ideal for Twitter on Instagram or Reddit. Each channel has its own culture and community. Make sure each post fits the channel's environment, mission and policies or standards.
4. **Is it authentic and transparent?** Trying to trick people into clicking a link or making a purchase will get you nowhere. Don't hide or exclude any relevant information.
5. **Is it real and unique?** Bots can automate tasks and be a great time saver, but use them for the right actions. Don't use auto responses and create anything that could be perceived as spam.
6. **Is it positive and respectful?** It may be fine to talk trash about competitors or complain about customers in the office, but not in social media. Don't badmouth the competition or customers.
7. **Does it meet codes of conduct?** As professionals we are part of trade associations that set standards of conduct. Be sure you are meeting these ethical standards such as the Word of Mouth Marketing Association's Code of Ethics.
8. **Does it meet all laws and regulations?** Government has been catching up with social media and have issued regulations and laws you must follow. See guides on requirements like the FTC social media endorsement guidelines.
9. **Does it meet the Social Media Policy?** Most likely your brand or a partner's brand has a social media policy. Ensure you follow your own company standards.

Social Media – DO's and DON'TS

Social media has changed the way that we communicate and in turn the way we conduct business.

The amount of traffic and information that social media sites produce is astounding. For example, look at the following statistics related to social interactions of the average Facebook user:

- Facebook has more than 1 Billion active users.
- The average Facebook user has 130 friends.
- The average Facebook user is connected to 80 community pages, groups, and events.
- Facebook has more than 900 million objects that people interact with (pages, groups, events, and community pages).
- On average, more than 250 million photos are uploaded to Facebook per day.

Do pick a professional screen name.

- How professional is it to have work colleagues or clients respond to posts from "HippieChick7" or "FratGuy75"?

Do create a professional profile.

- Think of your profile as your online business card. Sometimes, this is the way that people are first introduced to you online. What impression are you hoping to create? Put your real name and your actual photo on your profile. You may be really psyched about your Scooby Doo

collection, but do not use it in your profile picture (unless your business is selling Scooby Doo memorabilia).

Do keep personal and professional posts separate.

- Use Facebook's "list" feature to filter who sees what—you can set up lists "personal" and "professional" and designate what friends can view in each of those categories. Also, consider using Facebook's secret group feature—this might be an ideal way to separate personal from professional by creating a group called "personal" (or whatever name you choose) to keep friends and professional life separated. Too many people try to mix their business and personal lives; it rarely works successfully. Do you really want your business contacts to know that you call your best friend Tommy "Dorkface" on a regular basis?

Do be nice.

- Acknowledge people when they ask a question, apologize if you offend someone, and never ever spam, flame, or trash someone else online. Social media in the business environment is never appropriate for working out your childhood issues, settling a score, or arguing endlessly about your personal/social/political beliefs.

Do practice HALT.

- Never post anything if you are too Hungry, Angry, Lonely, or Tired. Take some time to rest, reflect, and recuperate, then, post it later.

Do use spell check.

- This may seem strange, but you should think about writing your responses in Word or some other word processing program and then posting the edited version. It can save you some embarrassment later on if you don't have to apologize for or explain away simple grammatical or spelling errors.

Do know your customers.

- Your social media pages should be tailored to your consumer base, not based on your own personal interests. To be frank, your consumers don't care about YOU. They care about what you can do for THEM. Post stories that they can relate to. If you work at a bakery, post recipes and tips and tricks of the trade. Follow the 80/20 rule. That is, 80 percent of your content (or more) should be relevant to THEM, while 20 percent or less can be specifically about your business, products or services.

Do keep track of time.

- Time *does* matter. Experiment by posting at different times and pay attention to the analytics. Find out when your followers are most active on social media and post during those time frames.

Do maintain one voice.

- Social media is great for sharing, but make sure your message is clear and consistent across all channels: website, public, social media, etc.

Do follow a checklist.

- Checklists are great for many facets of life, including social media. Sure, it sounds simple: Just log onto Twitter or Facebook, type a post and hit share, right? Unfortunately, it's not quite that simple. Make a checklist to ensure that your message will be understood, check for any grammar issues, make sure the information you're sharing can be shared and check the time you send it to ensure your readers will see it. Make sure all of your links are valid. These are just a few examples of things to pay attention to when crafting your tweets and posts. Attention to this detail could save you time and trouble later.

Do be original.

- Take a chance and be creative with your posts. Show your personality. Help people see what makes you different from the competition. When your main goal is to bring in customers, you have to stand out and make people remember you!

Do provide great customer service.

- Great customer service can make or break a company. Happy customers are more likely to come back and establish a loyalty to your brand. Not only will these customers be loyal to you, but they will also be your best brand ambassadors by word-of-mouth advertising. That's the best advocacy you can ask for!

Do have a personality.

- Dull, boring posts lead to dull, boring results. You have to be excited about your company, your product and the services you can provide your customers. If you aren't excited and don't love what you stand for, neither will your clients.

Do understand which social media platform(s) are best for your business.

- Just because everyone else seems to be on Facebook doesn't mean you need to be. Social media isn't one-size-fits-all. If you want to improve your SEO, then Google+ or YouTube might be your best choice. If you want to drive traffic to your site or improve your customer engagement, then Facebook, Twitter and Pinterest might be a better fit, according to Social Media Today.

Don't like your own posts.

- Of course you like your post. You posted it! But don't "like" or "favorite" your own material. Encourage your employees, however, to share and like the material that is posted. Your employees can be your brand's greatest ambassadors.

Don't neglect your profile(s).

- Use your social media! Having a Facebook page or Twitter account isn't enough. You have to maintain your accounts to make them work for you.

Don't share too much.

- Be careful of the things you share and don't share too much information. This one goes back to having a checklist. For example, if you are debuting a product and post hints or pictures too early, it could destroy the whole product launch that others worked so hard to build.

Don't post anything that you wouldn't want your mother, clergy person, clients, partners, or colleagues to see.

- Unless you are prepared to join the witness protection program, make sure your "internal editor" is always turned on. Too many people have had something they post on a whim come back to bite them later. This is especially true of the photos you post on Facebook, or use for your Twitter profile. Also, be mindful of privacy settings on Facebook—limiting who can see you in photos, who can tag you in photos, and who can check you out via Facebook Places.

Don't connect with *everyone*.

- Just because someone follows you, doesn't mean you have to follow them back. Think of it as choosing who you surround yourself with in real life. Before you follow back, think of how it will reflect on you. Is this someone who would represent you and your business in a good way if consumers saw that you were associated with them?

Don't forget to network.

- Just as you would in real-life, always work to make connections and grow your brand by networking and building quality relationships on social media. If your impression is good enough you might be able to work in a few word-of-mouth shoutouts.

Don't send winks, pokes, virtual martinis, or invitations for your business contacts to play online games.

- This is your professional life, not Tuesday night with the gang at the sports bar.

Don't be a stalker.

- If someone declines your friend invitation, move on. Do not keep trying to friend these people— at best, you will appear desperate and at the worst you will appear psychotic. Can you say "virtual restraining order"?

Don't forget about privacy settings.

- You use them on your personal profiles, so do the same with your business. Remember: Once you share something on the internet, it doesn't go away. Sure, you can delete the post, but screenshots live forever. Taking care of privacy settings also includes protecting your passwords. Choose a password that is extremely secure and only give passwords to a select few. You don't want your social accounts to fall into the wrong hands!

Don't be spammy.

- Just don't do it. Nobody likes spam, whether it be via email or social media. If you are constantly posting the same information over and over or inundating your followers, you risk becoming a nuisance and could lose some of the followers you've worked so hard to attract.

Don't ignore comments.

- It is vital to engage with your customers. With no engagement, they may feel as if you don't care about their question, comment or concern. It all comes back to customer service. Don't ignore relevant comments. Use them as an opportunity to interact with your followers and show them how you address positive and negative situations.

Don't delete negative comments.

- Acknowledging the problem can not only make an upset customer happy, but it can also prevent the company from a PR issue later. Addressing negative comments shows that your company is proactive in resolving issues and that you aim to serve your customers.

Don't rely on automation.

- You lose the personal touch with customers if it sounds like a computer is speaking to them. Humanize your brand to make the engagement experience for the customer more personable.

MORE RULES:

When connecting with “me” on Social Media

DON'T:

Be inappropriate

- Don't post inappropriate photos and/or comments on my Facebook wall or Twitter feeds or blatantly promote your products and services on my wall.

Sell straight off

- Don't send me an email about your upcoming workshop/event after having only just connected with me. We haven't had the opportunity to get to know one another yet.

Promote yourself

- Only posting or writing information about YOU and YOUR products and services, just because I am connected to you, doesn't mean I have given you an open invitation to broadcast your promotions.

Use me

- Never tag me in a video/photograph/other post that has no relevance to me because you're only trying to get my attention. Guess what? You did, but for the wrong reason. I've just unfriended and/or blocked you.
- That includes using my Twitter handle in a post to get my attention about your product or affiliate link. I won't be following you OR clicking through to the link. And certainly don't TYPE YOUR MESSAGES USING ONLY CAPITALS, otherwise I'll think you're SCREAMING AT ME.

Be impersonal or rude

- Go ahead and send me an invitation to connect using the standard request provided by the technology platform. I won't accept it. This indicates that you have not taken the time to read my profile or make a personal connection.

- Definitely don't use disrespectful language; bullying tactics; or name calling when commenting on my wall. If you disagree with something that either I or one of my followers has said, that's fine – I respect your opinion. Please respect my opinion and that of my followers.

When connecting with “me” on Social Media

DO:

Be a relationship builder and show me that you care.

- Show a genuine interest in what people are doing and saying and take the time to build relationships just as you would with any face-to-face interaction. People are more likely to recommend you, share your information with their network, or do business with you if they know, like and trust you.

Be respectful of others' opinions even if you don't agree with them.

- Social media allows you to connect with thousands of people you would never have had the opportunity to meet if you were just relying on face-to-face networking. And, many of them will probably have different values and opinions than you.
- Don't force your thoughts or beliefs onto others in a disrespectful manner – after all, your opinion is just that – yours. Instead be willing to be respectful of them despite the differences.

Be on-brand and mindful of the online footprint you're creating.

- Everything you do and say reflects on you and your brand. Be sure that your posts, comments and interactions are of a professional manner and that you aren't creating digital dirt that could cause a prospect to 'not' hire you.
- If you think something could be misconstrued or if you wouldn't want a prospective client to read it – don't post it! They'll surely find it, which may be the reason they hire your competitor rather than you.

Be a 'giver' and not only a 'taker'

- Social networking is not all about taking and receiving but rather it's about sharing resources and passing on information that you know would be of interest people.
- The more helpful and supportive you are in your interactions the more likely others will be willing to extend the hand of friendship and support when you need it.

Be honest in all your business dealings.

- The technologies we have at our fingertips allow us to do business with people on the other side of the world without ever having to meet them.
- Unfortunately, some people misuse these technologies by misrepresenting themselves and misleading people into parting with their hard-earned dollar.
- Ensure that you manage all your business dealings with the highest of integrity, service and honor, and that your customers are happy to recommend you to their extended network.

The Final Word

Remember, when using social media, the information you share and your interactions should not be 'all about you'. Avoid blatant broadcasting and promotion of your products and services to your followers. Rather it's about 'networking', sharing valued-added resources, showing an interest in others, providing support and assistance, and about establishing and nurturing a strong network of likeminded people.

Do be active but Don't over-do it.

- Be active on your social media, but don't post so often that you overwhelm or annoy people. This could lead to two problems: 1) Too much information can cause your followers to stop following your posts, and 2) Your posts can get lost within their newsfeeds and they won't see the content that could be really valuable to them.

Franchise Road Map

- Territory Definition and Investigation
- Franchisee Approval Process

Franchisee discussions with current Franchise Owners

Franchisee to meet the owners (In HQ or at their location)

Clearance Report (background check)

Step 1: Prospective Franchisee Receives: **OTFranchise Initial Steps Email**

- Application
- FDD
- FDD Receipt

Step 2: Prospective Franchisee submits application and FDD receipt to CW:

Whelan@otathletics.com

Step 3: Prospective Franchise reviews Road Map with CW

Step 4: Prospective Franchise sets up business & banking:

1. Legal

- It's time to open for Business. You need to incorporate and register the company.
 - Most franchisees have used LegalZoom.com
 - But there are many options you have for this to include consulting an attorney.
- Your charter, certificate of formation, or partnership agreement will at all times provide that your activities are confined exclusively to operating the Franchised Business, you will promptly furnish to us copies of your Articles of Incorporation, Articles of Organization, bylaws, partnership agreement, and any other governing documents.
- This process will allow you to obtain a Tax ID, which is required to do business.

2. Banking

- Begin to establish a relationship with a bank.
- You will want to open a checking account (and obtain checks).
- Access to funds and capital will be necessary to cover start up costs. Establishing a line of credit is recommended or accessing sufficient funds in other ways should be explored to meet the financial realities of starting a new business.
- You should also acquire a Corporate Credit Card at this time.

Step 5: Prospective Franchisee receives email: **OTFranchise LET'S GO!!**

- Submit Payment
- Preparation for signing

Step 6: Signing/Training Session 1

- Technology Distribution
- Distribution of Training Manuals

Step 7: Pre-Training Start Up/Set Up/ Overtime U (30 Days)

- Accounting/Bookkeeping
- Payroll
- Insurance
- Technology

Step 8: HQ Training & Welcome Kit

Step 9: In territory training

Learning from the Past: "Reflection Notes"

- *It really seems to make a difference with parents and coordinators when you are positive and friendly. This is something that I really stress with instructors during IHT. It's important to get personal and let them know how their child is doing. Communicate with every parent, and greet them with a smile on your face when they come to pick their child up.*
- *It is important to ask the parents how things are going any time I visit a program. I learn a lot about what is good and bad.*
- *One focus for me operationally is making sure that classes are run the way they are described to the parents. We send out info outlining specific class structure but it is not always followed by the instructors. Classes get combined, sports and games get left out, kids are not split up by age, and the parent can be dissatisfied as a result. I make sure to send out specific details to each instructor prior to the start of the class so they are aware of expectations.*
- *Partner retention is all about making sure my face is at programs and problems are addressed as soon as they come up. I made sure to be at every single program at least once during the session, and I think that really makes a difference in the school's and coordinator's eyes. It shows them that I am keeping up with how class is going, which allows me to correct any issue that I might observe while I am there. Responding in a timely manner is an absolute must. A little issue can become a big one if it is not handled right away.*
- *One thing I've learned about working with kids is that preparation is nearly the entire battle. When you, or the instructors, have a great plan going into a program/camp/clinic or league, the day will go a lot smoother. The kids are there to have a good time and play the games, but they need structure. As I always say in training, "Down time is prime-time for crime-time". Organization is just as important. The programs that I have observed that follow the warm-up, skill, drill, and game have gone so much better than when instructors try to "Free-Style" their programs. Often that leads to down-time and the kids get handsy with each other and the equipment. The programs we run are only hard I think when instructors make them hard on themselves. Have a plan, show up on time, and be energetic are simple ways to ensure success.*

- *What I have learned about program operations is that there is no room for shortcuts. After more than a decade of operation, a lot of the things we do are “paint-by-number” at this point. The trial and error portion of the company is over and the operations we have in place are for a reason. It does go back to preparation and making sure you are on top of your to-do list and banging tasks out in an intelligent order. I think an above average Program Director can make his/her day very manageable if they follow the process that is in place. Some of my instructors struggle early on in programs because they do not have their PDC on them in person. I always tell them that the PDC submittal is not to get me off their back; it’s to make sure they feel comfortable with their plan when they are on site. Every program/class I have ever coached I have always had my plan written out in my back pocket. It is a practice that I want all of my instructors to mirror. And the one’s that do have experienced success early on.*
- *IHT can be very time consuming. It is often not the most popular part of my day or any PD’s I would imagine. However, the process works when it is followed to the T. Last year I tried combining H-T sometimes and it lead to not so great results. This year, I made sure I followed the process all the way through and have reaped the benefits. You really get a sense that way of who is committed to the job and wants to be part of my team.*
- *Probably the most important thing I learned this year is to always over staff at the beginning of each session. Having a bench really is a life-saver. I was burned too many times Hiring and Training staff only for them to drop out at the last second. I have learned from my mistakes and always try to have a bench of substitutes. It has made a world of difference.*
- *One thing I’ve learned about staff management is to make sure I don’t give my veterans too much rope or leeway. I experimented with a couple of my veteran staff this spring texting me their call in’s in the morning. I would say the results are mixed. They all texted me in time (Save a couple of course)...but often I found myself having to call them later on to check in and see how programs were going or how new instructors were performing if I didn’t have a chance to observe them yet. I am not sure if I will continue this practice next school year, it will depend on who will be coming back and how they handled the process this spring.*
- *Another thing I learned this year about staff management is to make sure they know and follow through with the procedure for being late. Traffic happens, and they need to plan for it, but sometimes it comes out of nowhere and is unavoidable. Twice this year I had schools call me saying the instructor was not there yet only to find out they were running*

less than 5 minutes behind but didn't let anyone know. It will definitely be one of my focal points in IHT next school year.

- *We have a very easy way to run a program and the tools are great but one thing that blows me away is that some instructors forget some easy steps at times. For example the PDC and not always using the format or going away from the skill and drill and ending up scrimmaging too much. This all goes into training and coaching up the team of instructors.*
- *I have learned that you can't always judge a book by its cover. One guy this spring had a lot of experience in ymca coaching and I thought he would be a fantastic instructor. Instead he didn't do very well with how we run things and the "OTA WAY". I had to let him go this season but have learned that proper training requires an effort from the new hire to do the readings, to get familiar with the online training and videos, and to participate in the IHT exercises so that they can perform in their jobs.*
- *One thing I learned about working with kids is that you have to have a rock solid game plan. As I observed programs each and every day, the instructors who went into class with an awesome PDC were incredibly successful. The coaches who did not have an outstanding PDC often had a lot of standing around, and un-smooth transitions into the next game. Anytime there is a transition that is anything but seamless, kids begin to run around, touching each other and create chaos.*
- *Program Operations is all about organization. As I developed ways to become more organized, I felt my job getting easier. At the beginning of the year, I wasn't sure where to locate certain training materials, and I missed some steps when doing IHT. As the year progressed, my IHT got a lot easier because I knew where to find things. It makes a huge difference when the file sharing platform is organized and used properly.*
- *Instructor Training is so easy for me now thanks to IHT. I love our IHT program and how it is mapped out. It really is a great way to determine if someone is going to work out or not. A person could sound absolutely amazing during an interview, but when I sit down with them to do IHT, that's when I get a real picture of how they are going to fare, and whether they are going to "flake" or not.*
- *One thing I learned about staff management is to constantly keep in touch with instructors. I may not be able to make it to every school every day, but by shooting them a simple text message, I can check on how things are going, offer advice in areas where*

they may be struggling, and get a general sense of how the class is going until I am able to get there to see for myself. In September, I was not doing this, and I got blind-sided a few times and I remember saying in my head, “wow, I wish I would have known about this last week.” Now, I use the 11 am check-in and the after-class text messages as a way to gauge how things are going, learn about problematic areas, and address things that are not going to plan. Another thing I learned is that I need to call out my instructors more often. Once I started getting on their cases for not reading my Monday Morning Heads Up, a lot more of them began to read it and get the information that I was putting in it.

- *When working with kids it is important to be able to change gears quickly as their attention wanes, this is especially true for K-2. Instructors should be prepared with a variety of games for use during a single class. Don't be afraid to deviate from your game plan and jump to another game/sport. Don't let things get stale. When kids are active and having fun, parents and coordinators are happy.*
- *Most of my instructors are veterans and have been specifically trained on running OTA classes. As with anything else learned, instructors can get comfortable and make mistakes by forgetting specifics of their training. I find that repetition of these key points and reminders throughout the session are directly related to the success of the program.*
- *For me staff management is a lot like family management. Knowing when to instruct and advise on work related topics, or lend a compassionate ear to someone in need. Our staffs are varied in their composition. Every instructor has unique needs on the clock and off. We as management can create a positive and encouraging environment for them to thrive.*
- *Quality customer service starts with action. Understanding the needs of the partner and acting to resolve issues or address those needs contributes to the quality service for our partners. Communication is an effective way of staying in tune with each partner and can help us gauge the effectiveness of our service.*
- *Providing a quality product and service is the key to customer retention. We want our partners to feel an individual attention to their needs and requests. Each partner should feel like they are receiving our full attention when a response to a problem or request is required.*

- *There can be stressful times, as I was warned that there would be when I came on board. I didn't quite believe it back then, but I always kept that warning in the back of my mind. This was actually a great thing to know, because in the back of my mind, thanks to the warning, I knew there would be days where I would want to pull my hair out. When these days actually happened, I didn't panic and doubt myself as a Program Director. I think it may have happened three times from September to June, but each time, I was able to address the issues with ease and confidence because I knew it was going to happen at some point.*
- *There are certain parents that we simply cannot please, no matter what we do.*

OTA Landmines – Watch Out!

What follows are very real examples of CONCERNS, ISSUES and COMPLAINTS from PTAs/Parents/School Partnerships. The success of our programs is vital to avoiding these mistakes and sidestepping the situations that cause them.

**Below are specific complaints from PTA Coordinators or forwarded Parent Emails that demonstrate the impact these problems can have on our business.*

1. Instructors Being Late:

“Apparently, one of the instructors called our office last week saying he would be a bit late. 2 weeks in a row of being "a bit late" isn't great. We absolutely need these instructors ON TIME to our school. We often have a parent that makes sure the kids get to the gym, but she is NOT required to do that, so we EXPECT that your instructors will be there to greet the children. The children start entering the gym at 3:25 or 3:30, and class is supposed to start at 3:35. As I have said before, your instructors need to be in the gym and ready to go by 3:20!! We cannot have children going to the gym and waiting around for the instructors without adult supervision.”

2. Instructors Bringing the Wrong Equipment to Class:

“We signed up for a double-play class of basketball and floor hockey. The instructors have not yet done anything with floor hockey. The instructors said every time they go to check out the equipment, the floor hockey supplies are gone...how can that be?? Our kids are begging to start floor hockey, and the instructors keep telling them "next time", yet it never happens.”

3. No Variety in Sports Spectacular Program:

“My son, Ryan, is taking the Sports Spectacular camp for 2nd graders at Wakefield Forest. He is having a great time. He wanted to know if they were going to play basketball and/or go outside again and play kick ball. The last couple of weeks they have ONLY played dodgeball and he was just trying to figure out if that was the sport they were going to continue to play or if they were going to switch sports every week.”

4. Instructors Not Having Control of the Class:

“My son Brian will not be attending this class anymore. I stopped letting him go after watching the class. The instructor had no control of the older kids. They were cutting in front of them in line, pushing them and Brian did not even get a chance to touch the football once during the entire class. The other smaller kids were getting the same treatment. This is unacceptable.”

5. Instructors Not Teaching in Class (No Skill Development):

“I'm not sure if this instructor has any experience "teaching" the class. He has them practice skills, but never teaches or corrects any of the players, and then they are basically on their own to play. That's it.”

6. Instructors Lack of Involvement/Supervision/Professionalism:

"I thought I would also pass on to you that my son said things got really wild and out of control when the coach/instructor left the room to go to the bathroom. All of the kids went wild at that point and stayed wild. He said that the coach told them what the rules were in the beginning of class and then they were just left to play basketball on their own. He also said at one point the coach was laying on the floor texting on his phone, so maybe that could be why he did not see Brandon get hit by the other student. This lack of supervision and discipline is DANGEROUS!"

7. Behavioral Issues During Class with Teasing and Bullying:

Scenario 1: *"I just heard from the Assistant Principal at Kings Glen, that there was a bullying incident the other Thursday during the after-school OTA program that involved a 4th and 6th grader with name calling pushing etc. Parents were notified, but I was asked to contact you, so that your coach, who works with Kings Glen students, can keep an eye on the participating students in order to prevent this from happening again"*

Scenario 2: *"I am Scott's dad and I wanted to let you know that apparently last week Scott skipped lacrosse without telling anybody. We have determined that the reason behind this absence is because Scott feels like he is being intimidated by one of the other lacrosse participants, Eddie. I'm not sure if Scott is overreacting or if his concerns are real, so I don't want to make a huge deal out of this yet. However, Scott said that Eddie is telling him that he's not good at lacrosse and making fun of him. That's not "intimidation" but it certainly makes Scott feel bad enough that he skipped class for the sole purpose of avoiding Eddie. Scott also said that Eddie waits until you are not looking before he says things to him. I do not want this to escalate so I'm hoping we can take some corrective action sooner than later."*

8. Dismissal Procedure Complaints:

"I have had a couple of mothers call to express concern about the method of pick up from the cheerleading and soccer programs. It has been reported that no one is checking the students "out" to parents from either program, sending the students along with no supervision if the students say "oh, there's my mom", etc. I also want to make sure that your instructors are wearing their tee shirts as you said they would for identification purposes. I know that you had mentioned that they would be visible in their tee shirts (orange?) so there would be no doubt which program they belong to."

9. Not a FUN Class (Instructors Mean, Yelling all the Time):

"We need a change in instructor for the Program. Yesterday, I was walking through the halls checking on the classes. I observed your instructor speaking to the class in an unacceptable manner. She was upset with them for not listening and paying attention. I don't think the way she spoke to them was productive or respectful. Once they started back up, she clearly showed her disappointment when the group didn't move in unison. That's when I walked away and called you. I think her approach is demotivating and will impact the self-esteem of her participants."

OTA (SUMMER) Landmines – Watch Out!

What follows are very real examples of CONCERNS, ISSUES and COMPLAINTS from Parents and Summer Camp Partners. The success of our summer programs is vital to avoiding these mistakes and sidestepping the situations that cause them.

**Below are specific complaints from Summer Partners or forwarded Parent Emails that demonstrate the impact these problems can have on our business.*

1. Instructors Not Welcoming Parents and Campers at Drop Off:

"I think the staff was different this year, and NOT in a good way. I could see the difference alone at drop off. Last summer the staff would greet the kids and myself by name when I dropped them off every morning. They would have organized areas to play already set up and interact with the kids more. This summer I think I got maybe one hello and same with the kids! Overall the staff seemed to be annoyed to be there. No one even seemed to care when I dropped my daughter off."

2. Instructors Using Their Cell Phones During Camp Hours:

"All I hear from my children and their friends when I pick them up is that the Counselors are always on their phones. Texting, making calls, taking pictures, and surfing the internet does not promote a good environment for supervision. Hearing that this is also going on while children are at the pool is especially concerning."

3. Lack of Fair Play and Sportsmanship:

"My son attended this week's flag football camp. This is his third summer taking part in the camp and he looks forward to it every year. Today though, it ended badly and I thought you should know. It was the championship game and it sounds like things got out of hand. Boys wanted to win, coaches wanted to win. There was some punching, shoving, and kicking. Several boys got hurt and coaches just brushed it off. I am thoroughly disappointed in how things were handled and I hope that the coaches will be more mindful in future sessions. "

4. Lack of Supervision During Camp Segments and Activities:

"I expressed my concerns about the program and I'm not sending my children back because I believe it is unsupervised and unsafe. There is a real problem of older kids bullying the younger kids. These age groups should never be combined for athletic activities and it is happening all of the time. The Counselors in charge are clueless and lack the control of the group that is needed. Some were rude to the little ones and spent more time chatting with their co-workers than attending to the campers in their care."

5. Child (Camper) Safety:

"My 7 year old daughter tripped and hurt her ankle. We did not receive a call or notification that she had been injured. I had to take her to the urgent care the next day."

"Colin had a great time and enjoyed his day, so that is not an issue. However he apparently forgot to drink enough water, not sure if the staff gives them regular water breaks or if it is up to the children to decide when to go and get a drink. When I picked Colin up he was complaining of a bad headache and did not seem like himself. I noticed his water bottle was practically full and encouraged him to drink some water. After drinking some water, a few minutes later he began vomiting. His color was not good and I was concerned with the symptoms that he might have been dehydrated. I took him to the doctor and they tested his urine and said that it was "as concentrated as it can get." The conclusion was that he was in fact dehydrated. I wanted to make you aware of what happened today in hopes that it won't happen again."

6. Instructors Lack of Involvement and Enthusiasm:

"I'm really disappointed and I feel like I wasted my money. It is really just a day care, and the Counselors working are oblivious to what is going on. No enthusiasm, no involvement, no creativity, no effort."

7. Instructors Poor Professionalism:

"The Staff running the camp needs to grow up. Paying for our children to attend a camp where they are exposed to the type of behavior we are seeing from your Counselors is unacceptable. Counselors are flirting with one another, showing pictures on their phones to kids at camp, fights breaking out and no one doing anything about it, and kid's roughhousing and getting hurt at the pool while the Counselors lounge about and showing no concern. All of this and inappropriate language and conversation in ear shot of children has left me very upset with your program."

8. Dismissal Procedure Complaints:

"The sign IN and OUT policies are not thorough. The instructors aren't attentive to the kid's needs and what they are doing at the end of the day. I've seen children just walk out of the area to leave without any adult picking them up. You really must monitor the exits much better than what is happening now."

9. Agenda Complaints:

"We were told there would be arts and crafts projects. We were told there would be contests. We were told there would be special activities. All it seems to really be is dodgeball and way too many movies!"

10. Not a FUN Camp (Instructors Mean, Yelling all the Time):

"Today at camp I witnessed one of your coaches having issues with two kids & blew a whistle in their face & grabbed them by the arms to put them against the wall, while still yelling at them. Not a scenario that should ever happen at camp! Later when I picked up my child, he said that the coaches yelled most of the time & it just wasn't fun. The yelling really bothered him so much that he didn't want to go back the next day."