

OTA

Operations and Administration

Section 15:

Staff Management

- Staff Management: Notes
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“Take care of the people that take care of you.”

This is a mantra we try and follow in our business. Staff Management at its core is how you treat people, and if you want them to do well, stick around, and step up for you (and the business) when needed, then look after your staff, because they in turn will look after you and your customers. Training your staff is also common sense because it can improve your business performance, bottom-line profit, and staff morale.

Staff Management

Who is the best teacher you ever had? Who is the best coach you ever had? Who is the best boss you ever had? Who is the best teammate, classmate, co-worker you ever had? Start there. What qualities can you identify from your own experiences that can guide you in your quest to be a top notch and respected business owner, manager, and employer.

Just as different players need to be coached and mentored differently, so is it true that not all employees should be treated exactly the same, but what follows in this section are themes and philosophies of management that should be used and tested while honing your own management style. Simply put, they work.

Program Director: Notes

- Recommendation: Personalization of Email Communication
 - When determining whether to send out “mass emails” versus “individual emails” consider the fact that response rate increases with the personal “individual email” formats. There is a tendency for recipients of “mass emails” to file them away as low priority.
 - It doesn’t mean that the exact same email isn’t going to each recipient, and copy and pasting into an individual email format each time may seem tedious, but the results will be better.
 - When doing these “copy and paste” emails, make sure you still address them individually and the font is uniform. These small details matter.
 - Of course, there are many times when a “Group Email” makes more sense than an Individual Email. For example – Staff Heads Ups and Payroll Announcements.
- Automated Email Response (Out of Office Response Policy)
 - A reality of being a Franchise Business Owner and Program Director is that it is extremely important to be accessible. However, on the occasion when you will not be able to respond to customer communication it may be necessary to use an Automated Email/Out of Office Response.
 - In these rare occasions, be sure to use standard (vague) reply and to note directions for immediate assistance.
- Face to Face Meetings – Presentation is Everything
 - Management should wear business casual pants (khaki) and OTA collared shirt to face to face meetings.
 - Always bring OTA materials to face to face meetings (Brochure, Sales Packet, OTA Marketing Documents, etc.). You never know who might be attending.
- “GO BAG”: Sports Attire
 - Management should be prepared to head to run a class at any time.
 - Management need to wear OTA Instructor Uniforms if they are running classes. (No Jeans EVER)

Management Tactics: Notes

All leaders need strategies. It is important to have options at the ready for handling and dealing with employee management. Understanding the tactics below will assist you in your pursuit of developing an “OTA Team”.

- Training Emphasis (Instructors)
 - Can Instructor describe program/class to you?
 - Can Instructor describe games and procedures to you (use whiteboard)?
 - Ask Instructors what their STRENGTHS and WEAKNESSES are.
 - Teach and Train specific to programs they are running.
 - Specifically discussing the steps for addressing a child’s behavior problems or an injury with parents, must be covered with all new and old instructors.

- Shadow Session
 - A “shadow session” is an opportunity for a new hire to visit a program without actively working it to observe veteran instructors run the class.
 - New Hires (where applicable) should be sent to Shadow a class prior to working a program.
 - They can add this to their timesheets (optional).

- PD Training Classes
 - PD’s should run (*themselves*) “TRAINING CLASSES” for every instructor to have an opportunity to observe and shadow (veteran and new hires).
 - The PD Training Classes are an opportunity to instill habits, process, and format into the OTA Team.
 - The number of training classes will be dictated by the attendance you can orchestrate amongst your staff.

- PDC Hand Ins
 - Having instructors submit PDC’s before they go run a program achieves a number of goals: Accountability, Quality Control, Preparedness, and Evaluation of Instructor Ability.
 - New Instructors should be required to hand in PDC’s for their first 5 classes
 - It is at your discretion what policy you would like to institute for your veterans regarding handing in PDC’s.

- PD Field Evaluations
 - Getting your face to programs is so important to demonstrate oversight, provide customer service, and monitor class satisfaction.
 - Regularly complete PD Field Evaluations throughout each Program Session.
 - Compile and Upload Field Evaluations for record keeping.

Supervisory Tactics: Notes

- The Instructor Check In
 - Company policy is that on any day an instructor is working, they check in by a certain time established in training (typically 11am) to report in that they are “good to go” to work their program assignment.
 - This is a crucial procedure for ensuring all classes are covered and that the BOARD is set for that programming day.
 - Remember, “The Check In” is also a time to GIVE and GET Information – don’t underutilize the opportunity.
 - At PD discretion for allowing the “Check In” to be via text or email.

- “Staff Insider”
 - Developing a “Mole” on your staff is extremely helpful for gathering information you otherwise would not be able to get.

- Employee and Program Course Corrections
 - Do not wait for issues to develop or get out of hand. You should feel confident in your management and leadership position to require an instructor to meet with you in person to discuss any program related issues or to receive “extra help” with regards to their training and learning our systems and curriculum.
 - Issues of lateness, unprofessionalism, behavior, failure to follow OTA policies or procedures should be addressed immediately over the phone or in person with the failing instructor. If you are unable to reach them, you must send an email addressing the situation and requiring them to get in touch with you.

- Phantom Scenarios
 - A phantom scenario is defined as something that could happen but technically hasn’t. It is used to illustrate a point or provide greater impact than a hypothetical situation. The employees are not aware this scenario didn’t actually happen.
 - Phantom Scenario’s should be utilized to frame a conversation around important points and to demonstrate credibility and experience when managing staff/programs and problems/solutions.
 - A Phantom Scenario can be framed as taking place in another OTA Territory.

- Submittals
 - Employee (Instructor) “Submittals” Tactic - Using payroll and the submittal of timesheets as a tactic for having employees turn things in increases the success and response rate of getting the employee to follow through. Example: require instructors to turn in Program Progress Reports with their timesheet submittal in order for their payroll to be processed.

OTA Background Checks

*During your investigation of the Territory you will be providing programming in, you should immediately find out any local, school, or district requirements for employee background checks or clearances. Different states, schools, and organizations (like YMCA's or Parks and Rec) may have their own policy and procedure on how to complete these reports. There could be specific paperwork, central offices, etc. that must be used in order for your staff to be cleared to work in a certain building or with a certain group of participants. Note – many states have different requirements for Summer Camp staff than what is required by the schools during the school year.

**Be sure to discuss the clearance requirements with each partner. Make sure you understand the process AND timeline to complete these clearances.

***Cost can be significant to have background checks processed based on certain requirements from any of the entities outlined above. Make sure you understand what these costs are and whether or not the company or the New Hire will be responsible for them.

Clearance Reports:

- To be clear, a background check must be completed on every instructor that is hired prior to sending them to a program
- Clearance Reports should be printed out and included as a hardcopy in the Instructor's Employment File
- You should be able to access them at any time on the Background Check Platform
- If a partnership does not have a specific requirement for processing background checks, all OTA staff should be registered and processed through the following platform.

Clearance Company: Protect Youth Sports (www.protectyouthsports.com)

1. Call 877.319.5587 to set up your account.
2. You will let them know the state you are in and they will connect you with the correct representative.
3. Typically, the cost of a background check using their service is between \$9-\$15 per employee.
4. You have the option to passing this expense on to your New Hire.
5. Once your account is set up, you will be able to instruct your New Hire's to log on themselves to register for their background check to be completed.
6. You will want to become familiar with using this platform to sort instructors, monitor status of clearance reports, print reports for filing and record keeping, etc.

Staff Rosters and Schedules

The OTA Franchise Log In Platform contains information and videos on how to create staff rosters and generate staff schedules. Please refer to these tools in order to become an expert at using and utilizing the OTA HUB.

How to Create Instructor Info Sheet

*Go to OTA Hub to enter New Hires (Instructors)

1. Make sure you have “Top Sheet” hiring document available so that you can enter in the required information:

Instructor Name

Initials

Days

City

Email

Phone

Payrate

State

Street

Zip

Marital Status

Gender

Notes

Social Security

of Exemptions

Account Number

Routing Number

Date of Birth

Hire Date

Direct Deposit

Equipment

Clearance

- Instructors are alphabetized by first name.
- Instructor's Initials shall be the first letter of their first and last name unless there is another staff member with the same initials. In such a case, use a third letter to represent second and third instructor
 - I.e. MF, MFI and MFZ
- The days instructors are available to work shall be noted in the DAYS column. Click on availability to note days instructors can work.
 - For Example: T, W, TH
- An instructor that is not given a Session Schedule but is deemed as a possible SUBSTITUTE, should be listed as "available" every day of the week.
- The RESERVE designation should be given to instructors that are not currently interested in working programs OR we are not interested in them working programs but may in the future. This would apply to instructors that only work summer programs or leave the area during a certain session - for example to study abroad.
- Instructors who are terminated, with no chance of returning to our staff should be eliminated from the staff roster and removed from The Hub.
- When entering a new instructor:
 - Verify the information
 - Verify that the link for their e-mail works
 - Verify and update their information on any payroll document

How to Create Instructor Schedules

1. An Instructor's schedule is sent to them once they have been scheduled on the master programming calendar.
2. Once the Instructor has been placed at the given programs/days on the master programming calendar, it is then time to transfer that information over into a personalized email for that Instructor. (See email template below for INSTRUCTOR SCHEDULE)

SCHEDULE EMAIL TEMPLATE:

Please review the following:

1. Below is the schedule you are being assigned. IT IS SUBJECT TO CHANGE.
2. Please make note of the SCHOOL – PROGRAM – TIMES – DATES.
3. **Please confirm that you have received this schedule.**
4. Make sure you have the necessary equipment to run your programs.
5. You may always call in on a day you have not been scheduled to see if we can place you somewhere.
6. Please visit the website (www.otathletics.com) and click on the Curriculum tab to review the program descriptions for the classes you are scheduled to work.
7. If you have not been scheduled for one of the days you are available to work, you will be a RESERVE. Should we need a substitute, we will be contacting you.

SCHEDULE: See Attached

*Please let me know if you have any questions.

Thanks,

3. Attached to the email should be an excel spreadsheet created from The Hub.
 - Open Hub
 - Click 'Instructors' Tab
 - Click 'Schedule Details'
 - Choose Current 'Year, Session,' and the Instructor that needs schedule
 - Click Orange 'Export Arrow.'
 - Save Excel File as First/Last Name '(Dan Smith)' in ShareFile Schedule Folder
 - Attach Excel Schedule File to Email containing OTA Schedule Email Template
 - Send to Instructor

4. The Attachment will look like the following format:

Instructor Schedule											
Instructor Name	Day	Start Date	School	Program	City	State	Street	Zip	Start Time	End Time	Session
Kimia Dokahee	T	1/23/2018	Lees Corner Elementary School	CL+JR K-6	Fairfax	Virginia	13500 Hollinger Ave	22033	3:30 PM	5:30 PM	Winter
Kimia Dokahee	W	1/24/2018	Little Run Elementary School	BB K-2	Fairfax	Virginia	4511 Olley Ln	22032	3:00 PM	4:30 PM	Winter
Kimia Dokahee	F	1/26/2018	Franklin Sherman Elementary School	SS 2-3	McLean	Virginia	6633 Brawner St	22101	3:45 PM	5:15 PM	Winter
Kimia Dokahee	M	1/29/2018	Haycock Elementary School	SS K-2	Falls Church	Virginia	6616 Haycock Rd	22043	2:30 PM	4:00 PM	Winter
Kimia Dokahee	T	1/30/2018	Lees Corner Elementary School	CL+JR K-6	Fairfax	Virginia	13500 Hollinger Ave	22033	3:30 PM	5:00 PM	Winter
Kimia Dokahee	W	1/31/2018	Little Run Elementary School	BB K-2	Fairfax	Virginia	4511 Olley Ln	22032	3:00 PM	4:30 PM	Winter
Kimia Dokahee	F	2/2/2018	Franklin Sherman Elementary School	SS 2-3	McLean	Virginia	6633 Brawner St	22101	3:45 PM	5:15 PM	Winter
Kimia Dokahee	M	2/5/2018	Haycock Elementary School	SS K-2	Falls Church	Virginia	6616 Haycock Rd	22043	3:55 PM	5:25 PM	Winter
Kimia Dokahee	T	2/6/2018	Lees Corner Elementary School	CL+JR K-6	Fairfax	Virginia	13500 Hollinger Ave	22033	3:30 PM	5:00 PM	Winter
Kimia Dokahee	W	2/7/2018	Little Run Elementary School	BB K-2	Fairfax	Virginia	4511 Olley Ln	22032	3:00 PM	4:30 PM	Winter
Kimia Dokahee	F	2/9/2018	Franklin Sherman Elementary School	SS 2-3	McLean	Virginia	6633 Brawner St	22101	3:45 PM	5:15 PM	Winter
Kimia Dokahee	M	2/12/2018	Haycock Elementary School	SS K-2	Falls Church	Virginia	6616 Haycock Rd	22043	3:55 PM	5:25 PM	Winter
Kimia Dokahee	T	2/13/2018	Lees Corner Elementary School	CL+JR K-6	Fairfax	Virginia	13500 Hollinger Ave	22033	3:30 PM	5:00 PM	Winter
Kimia Dokahee	W	2/14/2018	Little Run Elementary School	BB K-2	Fairfax	Virginia	4511 Olley Ln	22032	3:00 PM	4:30 PM	Winter
Kimia Dokahee	F	2/16/2018	Franklin Sherman Elementary School	SS 2-3	McLean	Virginia	6633 Brawner St	22101	3:45 PM	5:15 PM	Winter
Kimia Dokahee	M	2/19/2018	Haycock Elementary School	SS K-2	Falls Church	Virginia	6616 Haycock Rd	22043	2:30 PM	4:00 PM	Winter
Kimia Dokahee	T	2/20/2018	Lees Corner Elementary School	CL+JR K-6	Fairfax	Virginia	13500 Hollinger Ave	22033	3:30 PM	5:00 PM	Winter
Kimia Dokahee	W	2/21/2018	Little Run Elementary School	BB K-2	Fairfax	Virginia	4511 Olley Ln	22032	3:00 PM	4:30 PM	Winter
Kimia Dokahee	F	2/23/2018	Franklin Sherman Elementary School	SS 2-3	McLean	Virginia	6633 Brawner St	22101	3:45 PM	5:15 PM	Winter
Kimia Dokahee	M	2/26/2018	Haycock Elementary School	SS K-2	Falls Church	Virginia	6616 Haycock Rd	22043	3:55 PM	5:25 PM	Winter
Kimia Dokahee	T	2/27/2018	Lees Corner Elementary School	CL+JR K-6	Fairfax	Virginia	13500 Hollinger Ave	22033	3:30 PM	5:00 PM	Winter
Kimia Dokahee	F	3/2/2018	Franklin Sherman Elementary School	SS 2-3	McLean	Virginia	6633 Brawner St	22101	3:45 PM	5:15 PM	Winter
Kimia Dokahee	M	3/5/2018	Haycock Elementary School	SS K-2	Falls Church	Virginia	6616 Haycock Rd	22043	3:55 PM	5:25 PM	Winter
Kimia Dokahee	T	3/6/2018	Lees Corner Elementary School	CL+JR K-6	Fairfax	Virginia	13500 Hollinger Ave	22033	3:30 PM	5:00 PM	Winter
Kimia Dokahee	F	3/9/2018	Franklin Sherman Elementary School	SS 2-3	McLean	Virginia	6633 Brawner St	22101	3:45 PM	5:15 PM	Winter
Kimia Dokahee	M	3/12/2018	Haycock Elementary School	SS K-2	Falls Church	Virginia	6616 Haycock Rd	22043	3:55 PM	5:25 PM	Winter
Kimia Dokahee	F	3/16/2018	Franklin Sherman Elementary School	SS 2-3	McLean	Virginia	6633 Brawner St	22101	3:45 PM	5:15 PM	Winter
Kimia Dokahee	M	3/19/2018	Haycock Elementary School	SS K-2	Falls Church	Virginia	6616 Haycock Rd	22043	3:55 PM	5:25 PM	Winter

5. If any changes are made to an instructor's schedule, the PD must make these changes to the BOARD, and then re-send an entirely new Schedule email to the instructor.
6. Once Instructor Schedules are sent, be sure to keep a record of email in an outlook folder.

Communicating with Staff: Alternative Programming

- It is very important to make sure Instructors are fully informed regarding whatever their assignments are for the programming they have been scheduled to work.
- Most of that communication when it comes to After School Programs is formulaic and is addressed in the OTA Training and Management Program, however when it comes to “Alternative Programming” (i.e., Birthday Parties, Leagues, Clinics, Field Days, etc.) it is essential to touch base with your instructor team on the specifics about that assignment.
- One way to do this is with a staff meeting prior to the program, but regardless – an email preview and summary of the program/assignment should be sent out to any instructor working the “alternative program”.
- Note – some “alternative programming” might be a different payrate. These “communication emails” to staff are opportunities to clearly state the compensation for whatever program is being worked so there is no confusion or disagreement after the fact.

*What follows are a few samples

Alternative Programming Communication: Sample 1

OTA TEAM:

Thanks so much for helping out with this program. We have been a part of the Royle Elementary Back to School Picnic for a few years now, and they love OTA! Please make sure you are in OTA uniform and that you bring the energy! Lot's of parents, make sure to be polite at all times.

Working tomorrow afternoon will be: Steve, Ronnie, Victoria, Erik, Karsten, Evan

Couple Notes:

Location: Royle Elementary

133 Mansfield Ave, Darien CT, 06820

Times: **Please be at the school at 4pm (games will start around 4:30pm, wrap up around 6pm)**

Details:

- Kids ages 6-10
- OTA should set up between 4-5 stations depending on number of kids and age groups wanting to play
- The field in the front of the school will be our area for running games
- Some parents may want to jump in and help out with games, which is perfectly fine!
- Stations:
 - Flag Football (older kids)
 - Steal the Bacon (younger kids)
 - Bump and Bite, Tiger Tag, etc. (can be both age groups)
 - Kickball (can be both age groups)
 - Relay Races (can be both age groups)
 - *Feel free to improvise you use any other game that fits and the kids would be excited to play

With about 15 - 20 minutes to go at the end of the event, start a tug of war contest with a range of different groups

- kindergarten vs first grade
- boys vs. girls
- bus riders vs walker and pick ups
- moms vs dads
- kids vs adults

Equipment and Set Up: I will touch base with Ronnie and Steve about the equipment we need over there (to include some first aid supplies)

Thanks guys and have fun!

PS – should weather be an issue, we will let you guys know as soon as we hear anything

Alternative Programming Communication: Sample 2

OTA TEAM:

Thanks for attending our pre-season staff meeting, appreciate everyone's flexibility. Here is the schedule for this weekend. Please respond to the email saying that you are locked in for your time slot.

Also, new procedure Please text me (or call) when you are on your way to the clinics this weekend.

Hindley: (JF point person) (D.YMCA Site Coordinator John Miceli)

7:45-11am-JF and WJ

10:45-2pm-JF and MB

Holmes: (MN point person) (D.YMCA Site Coordinator Ali Walsh)

7:45-11am-MN and FF

10:45-2pm-MN and MC

Please REVIEW ADJUSTMETNS we have made to Clinic Agenda and be prepared to execute:

Week 1:

1. Introduction of Coaches and Rules
2. Stationary Dribbling – King (or Queen) of the Court – “Simon Says” dribbling
3. Separate the teams on each end line into stacks
4. Speed dribbling and controlled dribbling

Teaching points:

- We use our fingertips to dribble
 - We keep our heads up
 - We keep the ball in our pocket
 - This is not a race!
4. Passing Game (**Refer to OTA Curric for Rules and Tips**) – BRING A TON OF ENERGY FOR THIS GAME!
 - Needs to be ORGANIZED and QUICK
 - Don't spend longer than 8-10min
 - This means you have to rotate 5 players through turns very quickly
 5. Hot Shot (Three Rounds) – Short Jumpers from the Low Block
 - Practice Round
 - First Team to 5
 - Who can make the most in 1min

6. Scrimmage – Controlled Scrimmage (YOU MUST TEACH WHILE BEING THE REFEREE)

- Subs every 4/5 min
- Line up in Man to Man
- Remind players to hustle back on defense (no press)
- No stealing off the dribble
- High Fives Line at end of Game

7. Bring everyone in the middle: review and cool down speech

8. Dismissal

Thanks again! This is a very important program for OTA and the Darien Y is a longtime partner. Have fun!

Alternative Programming Communication: Sample 3

OTA TEAM:

I appreciate everyone coming in to discuss the Flag Football League. You guys had great questions and I appreciate your enthusiasm. Thanks for stepping up and working this program that kicks off tomorrow morning. We start the league in Darien with an easy day of "evaluations". Please be in OTA uniform.

Couple Notes:

Location: Darien High School (Turf Baseball Field)

80 High School Lane, Darien CT, 06820

Times: **Please be at the field by 8:15am**

Sunday, Sept. 9 – Evaluation day.

4th-5th grade – 9:00-10:00 @ DHS varsity turf baseball field (about 25 Kids)

6th-8th grade – 10:00-11:00 @ DHS varsity turf baseball field (about 25 Kids)

Agenda:

1. When you guys arrive, organize up and discuss the plan below
 2. Joe Marzano (YMCA Sports Director) will be dropping equipment off
 3. Set up Flag Football Field (make sure cones are straight for sidelines, make sure endzone look good)
- Huddle players up for intro announcements
 - Quick Warm Up
 - Split into groups for Pass Patterns
 - Split into teams for scrimmaging
 - Make sure you explain rules to kids
 - Make sure you substitute players
 - No need to keep score
 - Take notes on players so we can split them up into teams for the season (we need to try and make these teams as even as possible)

*For the scrimmage, coaches should play QB

If any parents have questions, take note and let them know the Y (or OTA) will follow back up.

Thanks guys and have fun!

The OTA Staff Heads Up

The OTA Team is an unconventional workforce. Most employees are part time and have other priorities in their life. Some may be students; some may have other jobs. It is very important to recognize this reality and to also respect this reality.

Keeping your team informed and creating an “OTA Culture” can both be achieved with a regular weekly staff heads up email. It’s not always practical or necessary to require your staff to meet in person to review important topics. Other methods can be used (Conf. Call and ZOOM online meetings). But the Heads Up email is also a solid strategy for addressing and communicating company information.

- Be careful about making a weekly email repetitive (from week to week)
- Be careful about being too wordy (be concise)
- Be sure to use “visual cues” to segment and section your Heads Up email to address different topics – see format below:

“OTA Heads Up” Email Format (note – not every Heads Up needs to include every section)

- Introduction
 - Start with an overview or pleasantries
- Reminders for the week (numbers)
 - Use this section for logistical info or OTA Policy reinforcement
- Quick TIPS (letters)
 - Use this section for instructor improvement strategies
- Special Thanks (dash)
 - Use this section to recognize when someone went above and beyond or excelled in their role
- Player of the Game (nothing)
 - Use this section to announce recipients of an OTA reward for instructors that have performed at a consistently high level
- Special Announcements (asterisk)
 - Use this section to make announcements about submittals, staff meetings, schedule requests, payroll reminders, staff raffles or contests, etc.
- Game of the Week, no description, but word of usability (arrow)
 - Use this section to highlight Curriculum Options
- Conclusion
 - Use this section to be positive

Team OTA:

Enjoy this weather; it looks like it's going to be a beautiful week! I hope everyone had a great weekend and was able to watch the big game. What an ending! We have several new instructors joining our team this week, so if you find yourself working with any new coaches, be sure to welcome them and help them learn the "OTA Way".

Reminders:

1. End the program with your best game!!! – The last thing you do is the first thing a parent sees. Ending a program with drills is not fun; end it with an awesome game like capture the flag. Ideally, we want the kids to be sweaty and have a huge smile when their parents pick them up.
2. Think ahead—The 15 minutes before the program, take a moment to look around and picture what you will be doing. Make sure all instructors are on the same page!
3. Attendance- Make sure you are bringing a hard copy with you to every program. You are responsible for keeping track of all the kids, even the ones who are absent. Ex: Parent comes to the school looking for their kid (kid was absent) you should know if the kid was absent.
4. Head Counts—always know how many kids are present, head counts should be done after every segment of your PDC. Communicate that with other instructors.
5. Water Breaks—As we are going outside more, it's important that we are keeping a close eye on the kids. Water and bathroom location should be addressed at the start of the program. Let them know where they are allowed to go. Instructor **MUST ALWAYS** be with kids when going to bathroom/water fountains. Tell them to count to 5 then next person in line for water. You should have a time limit on these breaks, communicate this with the kids.

Quick TIPS:

- a. GIVE HIGH FIVES!!! How many do you really give in a program?
- b. Be silly—Let loose and be silly with the kids. Talk in a silly voice; try out your British accent or something.
- c. Use countdowns—Use countdowns for everything - to get their stuff and line up, to pick team names, to clean up equipment. This can create some excitement and also keep participants focused.

Special Thanks:

- Austin Read - Thank you Austin for always being helpful and being a great resource for the instructors. I hope all the instructors when they see Austin thank him for going out of his way to get your guys equipment, wristbands and anything else you need. Thank you again Austin!

Special Announcement:

*You must complete 1 PowerPoint Training Exercise and email it to me by Friday

*If you have not submitted your direct deposit information, do it ASAP.

*Training Session – Thursday @ 7pm (don't be late)

Game of the Week:

➔ **Clean up your backyard, it's under ball games. This is a solid one!**

If you have any questions, please let me know. Have a great week,

OTA Staff Conference Call/Online Meeting Guidelines

With a non-traditional workforce, using alternatives to in-person meetings should always be considered (but not always used. In person meetings still should be utilized to foster a corporate culture and appropriately train for certain programming).

Conference Calls and Online Meeting Platforms are very important to stay connected with your team of instructors and to also address incidents or situations that may have arisen in programming.

Conference Calls and Online Meeting Platforms are also wonderful tools for certain aspects of training, small group meetings, etc.

Prior to hosting meetings of this kind, be sure that your staff understands the rules, expectations, and topics for what will be discussed. Making sure these meetings stay on task and don't go over the allotted time is very important and a responsibility of management as the host.

Basic Rules to Follow

1. Be ready! Have the conference call phone number and access code or link ready so you don't have to search for it at the last minute.
2. Roll Call: Clearly state "Present" or "Here" when your name is called.
3. Mute after the Roll Call: Use the "mute" button on your phone/computer to keep out background noises, breathing, coughing, sneezing, etc.
4. Don't use the "hold" button FOR ANY REASON. It might make a buzzing in the line that can be heard by other participants. If you have "music on hold" the music will be heard by the other participants and interrupt the meeting.

Meeting Courtesy

1. Call/Log In Timing: "Attend" just a couple of minutes before the beginning of the Meeting. Don't join late because our meetings promptly begin on time. There is usually only a brief period for introductions prior to beginning with the bulk of the meeting information.
2. Preparation: If a "Call Agenda" is provided beforehand, please review and write down any relevant questions you anticipate having based on the topics.
3. Attend from somewhere quiet - away from pets, children, your spouse or coworkers.
4. Focus on the Meeting: Be courteous to your PD and your fellow participants, by giving your full attention to the Meeting.
5. Focus on learning. TAKE NOTES!

6. In the unfortunate event that you arrive late to the meeting, do not interrupt. Remain silent and catch up as best you can. Do not ask the PD to repeat any material that you may have missed. Wait till the end of the meeting to see how best you should catch up on previously covered material.
7. When commenting on what another participant has said, please keep your comments constructive, positive, and short.
8. When a question is asked to the group, respond with yes or no, or whatever would be an appropriate response, when your name is called. To remain on mute and/or not responding is “ignoring” the person asking the question. It can be very disconcerting to not hear any response.
9. Don’t be shy. PD’s will give the meeting participants opportunities to ask questions. Please take advantage of the situation to get questions and concerns addressed.
10. Thanks for your participation in the OTA Staff Conference Calls/Online Meetings

Evaluating Staff

In order for the OTA business to thrive, we must be meeting customer expectations and satisfaction (or more to the point, exceeding their expectations!). A supervisor that doesn't have their finger on the pulse of their staff and the direct knowledge of the performance of their team will never be able to guide their business to the next level. It is imperative to know the strengths and weaknesses of your instructors so that you can put them in a position to succeed, and ultimately the business in a position to succeed. School feedback, Parent feedback, Coordinator feedback, Staff feedback, and surveys are all very important ways to gather information about the service being provided, but none more effective and important than seeing it with your own eyes.

Working alongside your team is a fantastic way to teach, train, and develop the type of culture OTA needs to thrive. At some point, the volume of programming will not allow you to work alongside your team as much as you'd like or once were able to. When that day comes, it's important to have a plan and tools in place for evaluating the performance of your employees.

Evaluations typically fall into two categories:

1. "Game Evaluation" (in the moment)
2. "Season Evaluation" (over an extended period of time, like the program session)

Game Evaluations – visiting a class, camp, or program

*Follow the below steps when evaluating instructors at a program

**It is not necessary to see an entire class to be able to evaluate. Whether you visit a class for 5 minutes or the whole time, you should complete an evaluation.

- Always approach Instructors and say hello when you arrive.
- If before class, ask to discuss their programming day card.
- If at end of class, tell them great job and ask if they have any questions about anything you might be able to help them with.
- If you leave before class is finished, make sure you wave goodbye.
- Do not interfere or help with class unless there is a safety issue, or you have decided to show a certain instructor specifically how to do something.
- Make notes about good and bad of class/instructors.
- Use OTA Field Evaluation form as guide – SEE FORM ON NEXT PAGE
- If instructors have question that you can't answer in that moment, make note, and be sure to follow back up.
- When on Programming Site, keep comments brief. Should it be needed, you will present further observations at a later time.
- Do not be in the way or a distraction to the children when you are at the programs.
- If a PTA volunteer is present or a parent is watching, introduce yourself; ask if they are happy with what the class has offered. If they have negative feedback, let them know that their concerns will be addressed immediately.
 - (Even if you have to jump in and take over the class.)

- OPTIONAL: When leaving the program leave enough Gatorades for each instructor.



Instructor Evaluation Form

School _____

Class _____

***Check all boxes that apply**

<u>Instructors:</u>	Uniform	15 Min. Early	Equip.	PDC
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Overall Energy, Attitude and Pace of Class:

Comments / Games Played

- Instructors Energetic
- All Students Involved
- Fun Environment
- Solid Pace of Program
- HIGH FIVES

Season Evaluations – meeting with an instructor at the end of a session or programming year to review their performance. Using the below Evaluation Form is an excellent tool to prepare for the employee meeting and guide for the conversation to be had with Instructor.



Overtime Athletics Instructor Evaluation

Name of Instructor: _____

Session: _____

Programs Instructed: _____

	Excellent	Good	Fair	Poor
1. Overall rating as an instructor	4	3	2	1
2. Punctuality	4	3	2	1
3. Knowledge of Curriculum	4	3	2	1
4. Class organization	4	3	2	1
5. Time management	4	3	2	1
6. Safety and space awareness	4	3	2	1
7. Creativity/Innovation	4	3	2	1
8. Your care for uniform/equipment	4	3	2	1
9. Implementing dismissal procedure	4	3	2	1
10. Working with other instructors	4	3	2	1
11. Communicating with Management	4	3	2	1

Punctuality

11:00am Check-in:

Arrival Procedure (on time, looking professional, checking in, setting up for program):

Payroll (comments)

Learning The Students Names

Additional Comments

Strike Procedure Outline

In order to achieve the professionalism necessary to operate a customer service driven business, it is essential to plan for addressing situations, issues, and negative feedback that may come out of providing the service. It may even be necessary to formally reprimand or issue a “strike” to an employee who has not adhered to OTA Policies, Procedures, or Employment Expectations or Best Practices. What follows is an outline for how management should address different levels of criticism.

Management Options for Addressing Criticism:

1. Immediate – On Site in Person (Serious Issue)

- Try not to do it in the building
- Parking lot, away from customer traffic
- This is for a serious problem that must be addressed immediately
- *If this happens to be when you are around the instructor, but there is no serious problem, it's still a great time for pointers, and encouragement*

2. Phone Call (Semi-Serious Issue)

- Address the problem quickly
- Make sure it's a convenient time for them to speak (and they are in a convenient place)
- Be specific and to the point

3. Email – same day or day after (Semi-Serious Issue / Pointers)

- Keep concise
- Require response
- Allow an option to respond by calling you back

4. Next Call-IN (Pointers)

- Easy issue to correct
- Pointers for improving

5. Office Meeting (Several Strikes / Serious Investigation)

- Several Strikes already in Play
- Investigative Circumstance
- Instructor Behavioral Problem

Procedure for Issuing and Recording Strikes:

1. Decide if transgression requires formal action in the form of an official warning (strike).
2. Contact Instructor (face to face or phone call) to inform him or her of your decision to issue a strike.
3. Clearly state the facts (and their actions) that led to your decision.
4. Offer an opportunity to discuss and allow them to give their point of view.
5. Ask whether or not they understand the strike and if they now know how to avoid making the same mistake.
6. Let the Instructor know that the strike will be documented in their employment file.
7. Follow up verbal conversation with email to instructor documenting the facts for receiving a strike.
8. Printout email and file in employment record.

Staff Management: Kill'm with Kindness

OTA believes in creating a culture of teamwork. We believe in demonstrating to our staff their importance and value to our system. Most importantly we believe in taking care of the people that take care of us. The OTA Kill'm with Kindness budget is designed to show appreciation for Instructors and be a tool for Directors to incentivize their staff.

- Each PD should have a Kill'm with Kindness Budget each session to be used for staff incentives.
- It is designed to be a resource for Director's to solve problems and support instructors who step up for OTA.
- Some scenarios where the Kill'm with Kindness Budget can be used include:
 - Incentivizing an Instructor to fill in on a day they aren't scheduled to work
 - Changing an Instructors schedule to move them to a different school/program
 - Incentivizing an Instructor to work a class that requires them to travel further than the expected distance to run programs
 - Appreciation for an Instructor running a class by themselves

Directors should record their utilization of this budget each session on the Kill'm with Kindness Spreadsheet. Recorded information includes:

- Date
- Instructor Name
- Reason
- What was Given

Kill Em With Kindness			
Territory:	Session:		
DATE	STAFF NAME	REASON	WHAT WAS GIVEN

Incentives Options to Consider:

- Gas Gift Card, Starbucks Card, Subway Card, I-Tunes Gift Card, Visa Gift Card, Target Gift Card, Bonus in Paycheck, Cash Envelope, OTA Gear

Player of the Game

The OTA Player of the Game (POG) is a mechanism for demonstrating to individual instructors AND the whole team that their commitment and good work do not go unnoticed and are valued in the business. People like recognition and OTA Management should enjoy showing recognition. Incentives work and promoting best practices and a culture of success will serve your business in countless ways.

Player of the Game recipients can be recognized in a number of ways.

- Individual Recognition – just announcing to the person you want to thank and acknowledge for their good work or stepping up for OTA.
- Staff Heads Up Recognition – including the announcement of the recipients in the regular weekly staff email in the designated section.
- Special POG Announcement – crafted announcement to include multiple recipients (often from many or all OTA Territories)

SAMPLE: Individual Recognition – Sent in the Mail to recipient with reward (Gift Card)

Overtime Athletics **Player of the Game:**

In recognition of your outstanding effort and work during this past session, Overtime Athletics has selected you as a Player of the Game.

We want you to know that we value your dedication as an OTA Instructor, but more importantly the children you work with do too.

Thanks for all your help, and we will continue to appreciate your ongoing effort in providing the highest quality of youth athletic programs.

Best,

OTA

**SAMPLE: Special POG Announcement Recognition – Sent via email to all staff
(reward sent in the Mail to recipient (Gift Card))**

Dear OTA Staff:

This message comes from Overtime Athletics Headquarters and we wanted to send out a few announcements in preparation for wrapping up the Winter Session and kicking off the Spring Session, which is quickly approaching in March. This session has been very successful and hopefully will be a strong indication of how we will finish out the school year. Please remember that it's the "little things" that make our program a success. Be sure to participate in one on one moments with the participants of your programs, prepare fun and exciting programming day cards, and learn from each other in order to improve as instructors from week to week.

We hope you communicate with your Program Director to touch base on any feedback about your experience working in our program. We are very grateful for the members of our team and value your thoughts and opinions as it relates to how we can improve our service and provide the highest quality of youth athletic programs.

Please keep up the great work! Each Program Director for Georgia, North Carolina, Richmond, VA, Northern VA, Maryland, Pennsylvania, New Jersey, New York, Connecticut, Massachusetts, and California have selected a member of their staff that has stepped up for OTA and deserves some special recognition. Each session we designate these instructors as "Players of the Game":

MA – Annie Sloan is back in the game! Annie is one of our Somerville, MA instructors. She did not have the availability to work in the fall but has returned right on time this winter and working a Monday program that OTA needed. Great to have you back!

CT – Dana DellaValle steps up again! Dana has really done a great job helping our CT winter programs kick off. She worked a Ridgefield, CT program that began right after the New Year, which is 30+min away from her.....2 weeks in a row! Thanks for being the ultimate team player and stepping up for OTA in a big way.

NY – Jordan Kalish has emerged as one of the elite OTA instructors. His attention to detail, punctuality, professionalism & preparedness at programs have proved to be a winning combination. Jordan has been working a variety of programs for OTA, specifically a Jump Rope class in Chappaqua which has received very positive feedback. Thanks for embracing what it means to be a top instructor and representing the OTA brand.

NJ – Rich Wolfert was a new instructor this fall, but with his teaching background he was a perfect fit for OTA. Rich is always willing to go out of his way to make sure that his classes are great. Rich will be an important part of New Jersey during the spring in training new instructors!

PA – Lindsay Anderson has been a wonderful addition to our OTA staff last fall and has quickly become a go to instructor for Philadelphia. She always calls in on time, gives great feedback from the programs, helps train new staff members. Great job Lindsay!

MD – Taylor Schallhorn transitioned from our NoVA to MD and has immediately contributed to our operations. The large program that he helps run is at a school which needed a very positive performance from us and he has been a key component in providing just that. His enthusiasm for the position is clear and his diligence in communication is greatly appreciated.

NoVA – Ryland Edwards is a veteran instructor who continues to show OTA what OTA is all about. He teaches kids and allows himself to be a kid too. He enjoys teaches and seeing kids having a blast. Other instructors and school request him due to his passion and loving attitude.

RichVA – Connor Dolson has been with OTA since the fall and exemplifies what it is to be a leader and team player. Connor is always willing to step up when needed and comes prepared for every class he teaches. He never misses a call-in and is diligent about planning a variety of games for the kids to enjoy. He is a valuable member of OTA Richmond and a pleasure to have on staff. Great job, Connor!

NC – Kaleb Hopkins has done a great job this winter with the kids and interacting with them. He is always good on call-ins and helping us out when needed. We appreciate his help in supporting the new instructors we have brought on for this winter session and look forward Kaleb continuing his positive attitude and flexibility for the remainder of the school year.

GA – Ally Carpeter deserves big thanks for helping us out by reserving the room for our staff meeting. Her professionalism is fantastic, always early call-ins and always prepared to run programs. We appreciate her feedback on our programs and how we can improve.

CA – Tim Larson and Jeff Perez both have stepped up to the plate to start off another very successful session in California. They have kept up the energy and enthusiasm at Circle View, and opened also opened up California Elementary in Costa Mesa for us. Keep up the hard work guys and Thank You for all you do!

On behalf of Sean Myler, Ryan Reiner, Christian Ramirez, Mike Banholzer, Zach Blechman, Matt Hale, Miranda Creel, Brandon Stancil, Sherrie Landfair, Chris Horich, Chris Whelan ... Thanks for your work ethic and program performance this Winter!

Recipients of "Player of the Game" recognition will be receiving an envelope in the mail with their reward.

**All recipients will receive a \$25 Gas Gift Card and \$10 Subway Card!*

Thanks from the OTA HQ!