

# Staff and Program Management Best Practices

## 1

### STAFF RECRUITMENT:

\*Have I created and completed the “TARGET RECRUITMENT SPREADSHEET”?

YES \_\_\_\_\_

NO \_\_\_\_\_

\*Have I created and completed the “RECRUITMENT OPTIONS SPREADSHEET”?

YES \_\_\_\_\_

NO \_\_\_\_\_

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### INSTRUCTOR ONBOARDING:

\*Do I use the “OTA EMPLOYEE RESOURCES” Instructor Log In Portal?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*During the steps of IHT, do I reference the “IHT KEY POINTS DOCUMENT”?

YES \_\_\_\_\_ NO \_\_\_\_\_

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### IHT SYSTEM:

\*Do I complete each step (every time) of the “IHT SYSTEM”?

- Applicant Screening
- Interview
- Hiring Preview Appointment
- Hiring Review and Training Preview Appointment
- Training Review Session
- New Hire “Rookie” Conference Call

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do I complete the “NEW HIRE ROOKIE CONFERENCE CALL” within two weeks of each instructors training?

(Behavior Topics, Instructor Tips, Situational Responses)

YES \_\_\_\_\_ NO \_\_\_\_\_

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### GEAR & EQUIPMENT:

\*Are my instructors "GEARED UP" in accordance with the OTA Brand?

- OTA Uniform
- OTA Backpack
- Instructor Folder
- Pump, Whistle, Ice Packs, First Aid
- Name Badge, Welcome Paddle

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do my instructors have the proper "EQUIPMENT" for their classes?

YES \_\_\_\_\_ NO \_\_\_\_\_

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### STAFF COMMUNICATION:

\*Do I send out “MONDAY HEADS UPS” to my staff?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do I require my instructors to “SUBMIT PDC’s” for their classes?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Have I had “IN PERSON (or ZOOM) STAFF MEETINGS”?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do I hold “CURRICULUM TRAINING WORKSHOPS” for my instructors?

YES \_\_\_\_\_ NO \_\_\_\_\_

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INSTRUCTOR ROSTER:

\*Am I doing "ROLLING IHT"?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do I have a reliable and deep "INSTRUCTOR BENCH" for substitute needs?

YES \_\_\_\_\_ NO \_\_\_\_\_

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### SERVICE MANAGEMENT:

\*Have I created and kept up to date a “CUSTOMER SERVICE SPREADSHEET”?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do I get my “FACE TO PROGRAMS”?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Are there any instructors on the “SHIT LIST”?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do I have any “CODE RED” Programs?

YES \_\_\_\_\_ NO \_\_\_\_\_

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**SERVICE MANAGEMENT (cont.):**

\*Have I completed "INSTRUCTOR FIELD EVALUATIONS" for each employee?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Has each instructor submitted a "PROGRAM PROGRESS REPORT"?

YES \_\_\_\_\_ NO \_\_\_\_\_



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CUSTOMER SERVICE:

\*Do I “CHECK IN” with my partners and coordinators regularly?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do I immediately “RESPOND TO PARENTS” questions and concerns?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Am I sending out “SURVEYS” to get feedback from participating families of my programs?

YES \_\_\_\_\_ NO \_\_\_\_\_

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## FRANCHISEE GROWTH:

\*Am I spending time “FLIPPING AND CLICKING” through my Franchisee Manuals and support platforms in order to continually learn and grow as a Franchisee Owner and Operator?

YES \_\_\_\_\_

NO \_\_\_\_\_

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### PARTNER RELATIONSHIPS:

\*Are you building relationships with your ASP & Summer Camp Partners?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you check in regularly with ASP & Summer Camp coordinators/contacts?

YES \_\_\_\_\_ NO \_\_\_\_\_

Do you offer Free ASP and Summer Camps to your coordinator's families?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you do handouts at ASP's & Summer Camps?

YES \_\_\_\_\_ NO \_\_\_\_\_

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### PROGRAM SALES METHOD:

\*Do you keep your HUB Territory Sales up to date?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you utilize the “Opportunity Feature” within the HUB Territory Sales?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you call 20 schools/facilities per day?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you email 20 New School/Facility per day?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you “sequence email” perspectives/targets in your sales method?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you monitor competitors’ websites to see what schools they are in?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you leverage relationships with families whose kids attend camp to develop a pipeline into the schools they attend?

YES \_\_\_\_\_ NO \_\_\_\_\_

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## BRAND MANAGEMENT:

\*Do you feel you are a part of the Community?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you offer the Principal/PTA scholarships once you have met your minimums?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you participate in school events— where applicable (Back to School Night, PTA Socials, School Restaurant Events)?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you utilize Social Media?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you set up Fundraising Opportunities with your School Partnerships?

YES \_\_\_\_\_ NO \_\_\_\_\_

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### PROGRAM ADVERTISING AND MARKETING:

For ASP:

\*Do you blast your school's database 3-4 times with program information before the program starts?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you make flyers? Do you leave them on the "community table"? Do you request they be sent home in Folders?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you ask the School/Facility to help promote on their Social Media?

YES \_\_\_\_\_ NO \_\_\_\_\_

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## PROGRAM ADVERTISING AND MARKETING:

For Summer Camp:

\*Do you have early bird deals?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you run TAP a Friend campaigns?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you offer Friend2Friend campaigns?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you utilize yard signs?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you run offers/drawings on Social Media?

YES \_\_\_\_\_ NO \_\_\_\_\_

\*Do you reach out to local youth organizations and ask about advertising through them?

YES \_\_\_\_\_ NO \_\_\_\_\_