

A United Way agency



Literacy Advance *of* Houston

Nonprofit Management Operations & Personnel

Welcome!



DISCUSS

Why are you sitting here
on the third day of a
conference to talk about
operations and HR?
No, really? 😊



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In this session:

Everything starts with a plan!

~ Building a culture

~ Talent management:

Setting expectations

Resolving conflict



Building a culture

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DISCUSS

What are your agency's values? How do you communicate them?

Discuss with a partner.



Building a culture:
Define who you are
Define what you want
What are your agency values?



**A big part of culture is leadership; you need to define what sort of leader you are.*

We don't have enough time today, but learn about this! It affects how you hire, how you construct your operational plan, etc



DISCUSS

Do you have an
Operational Plan?
What do you think are
the most important
elements of it?

Discuss with a partner



Your Strategic Plan is the
starting point -
But don't forget – PICK THREE!
(or even just two)...

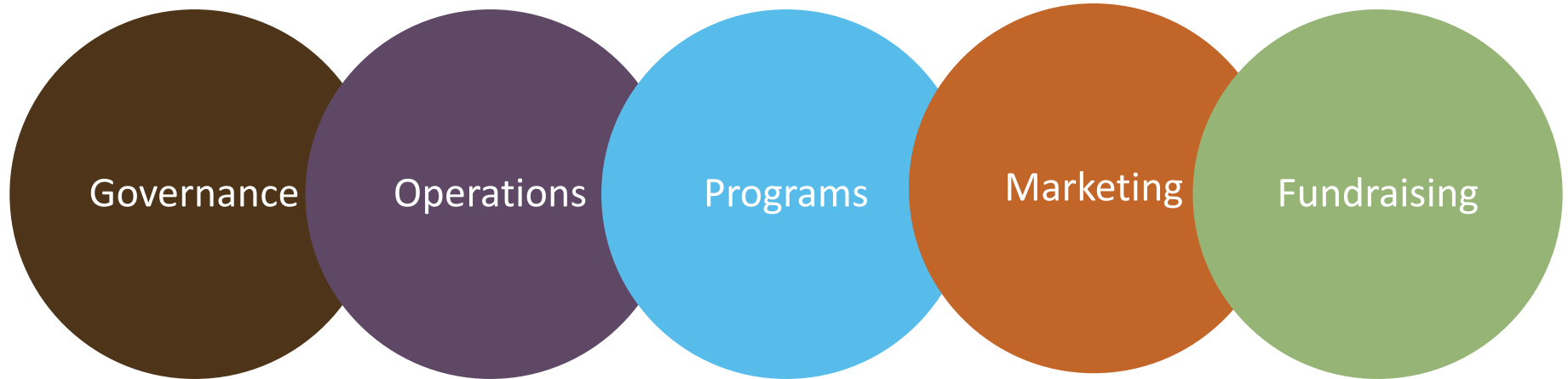


Everything starts with a plan: Operational Plan



What makes it all work?

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An Operational Plan should also include implementation.
An example would be Professional Development.



Everything starts with a plan: Plan for Talent* Management.

*Talent = Staff, volunteers, interns.



Everything starts with a plan:
Planning for onboarding means
planning for success.



Talent Management: Setting Expectations

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Note: Personalize checklist BEFORE printing by striking through items that do not apply.



Name:
Supervisor:

New Staff – Preparation Checklist

Before new staff member starts (not all will be appropriate) –

- Ensure signed offer letter returned within timeframe (can be digital copy and staff member can bring original later)
- Remove job listings from all sites, including Literacy Advance website and UW jobs bank (see prep page for full list).
- Send copies of new staff member's resume and cover letter to Sheila for filing.
- Ensure updated internal version of job description ready for signing.
- Speak to Irene to get New Hire Packet (there are different versions – Irene will organize).
- Email new hire, remind of items to bring on first day – [use template message on file](#).
- Organize benefits counseling (talk to Sheila to set up appointment).
- Send Kathryn and Irene an email to create a new computer profile, using the template below:

Ideally, give a week's notice. Delete and edit as appropriate.

FirstName LastName

Title: Title Title

No remote access

Drives: H, P, F, R

Email address: FirstInitialLastName@literacyadvance.org

Outlook group: LAH, Wilcrest, Programs

Temporary password: Literacy123

- Order business cards (talk to Irene).
- Add item to IT Issues list to get Wallchart software added to computer (not always necessary; check first).
- Organize office space and desk area.
- Block 30 minutes with Executive Director on staff member's first or second day.





Name:

Supervisor:

New Staff – Onboarding and Orientation Checklist

Use this list to create new staff member's calendar and help plan activities.

Do NOT give this list to the staff member. Do NOT sit and run through the items in order 😊

On new staff member's first day –

Brief tour of building/office:

- All main rooms and offices.
- Kitchen: Keep door closed, use of fridge (no lunch bags please!), cantina, items for general consumption, and not...
- Information boards and other displays for tutors and students.
- Introduce all staff, especially main contacts/supervisors.
- Phone information (detailed if working on front desk; general if other).
- Restrooms – location and code (no code needed for upstairs restrooms).
- Parking arrangements.

Review housekeeping items, including:

- Issue key(s), swipe card(s), parking pass, and any other necessary items (eg laptops).
- Show desk and workspace.
- Computer usage: login name, temp password; email; remote access; re-start computer at end of work day.
- Share calendar, organize access to co-workers' calendars and Agency Calendar
- Walk through setting up email signature – use template; talk about email groups (LAH, Wilcrest, etc)
- How and when to use H Drive/My Documents, P Drive, any other accessible drives.
- How to call in sick; how to complete form after sickness; exchange cell phone number with supervisor.
- How to check voicemails.
- Friday casual day; dress code for rest of the week (refer to Handbook).
- Keep voice low; walls thin and sounds carry; Programs Office rules/requests.
- No eating at desk, even snacks; no ear-buds or headphones.
- No personal cell phone usage during work hours; take calls out of the office and kitchen.
- Go over onboarding calendar for first two weeks and explain items and context.
- Take photo: give to Kathrjn for Meet the Staff page. welcome on TV screen & social media. website. and other.



*(Everything starts with a plan –
and ideally, it ends with a plan too...)*





Name: Supervisor:

Staff Member Leaving – Separation Activities

Within final two weeks (if possible):

- HR creates communication plan including public announcement, date leaving, forwarding of personal information, who to contact.
- Employee creates transition document(s) – use Handover Plan template on file as a starting point.
- Employee cleans and finalizes H Drive – essential documents moved to P Drive (or otherwise allocated), others deleted.
- Employee clears desk and goes through files, locations of important items, etc, with supervisor.
- HR completes payroll and benefits activities:
 - Determine termination date for benefits.
 - Complete rollover paperwork for employee-specific benefit policies.
 - Conduct PTO counseling with employee.
 - Process termination of benefits – contact benefit vendors.

Day of separation:

- Exit interview
- Return of office key(s), swipe card(s), credit card(s), other:
- Return of parking pass
- Return of laptop/flashdrive(s)/any other equipment
- Settle cantina tab
- Ensure all items removed from fridge, pantry, and elsewhere in kitchen
- When all complete, sign below
- Mailing address for any forwarding:
- Personal email address for updates:



Staff: Monthly Supervisions

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- Based on Goals & Competencies
- Monthly meetings, one hour
- Inform Performance Evaluations



Pre-Supervision Reflection: Coordinators & Assistants

★ Please send your completed form to your manager at least two days ahead of your supervision.

Working on these competencies:	Goals for 2017:
<i>Informing (27)</i>	1. Gain understanding of the Programs Department and the fields of Adult Education and volunteer management.
<i>Priority Setting (50)</i>	2. Ask questions as necessary and appropriate to learn more about Literacy Advance and the Programs, their context, and background.
<i>Customer Focus (15)</i>	3. Complete all aspects of job description.

How did you work on one of your competencies since your last supervision?	Notes
>>	
<i>Supervisor response:</i>	
>>	
How do you plan to work on one of your competencies in the coming weeks?	
>>	
<i>Supervisor response:</i>	
>>	

How did you work on one of your goals since your last supervision?	Notes
>>	
<i>Supervisor response:</i>	
>>	
How do you plan to work on one of your goals in the coming weeks?	
>>	
<i>Supervisor response:</i>	



Other questions include:

- Greatest achievement for the past month
- High points of the month
- Challenges, and steps taken to overcome
- Wishlist
- Priorities until next meeting



Match volunteers carefully!
Check skills, interests, availability...



Volunteers: Matching

Part 2: Affiliations

*Some places of business will match time that you spend volunteering with cash donations to Literacy Advance!
Some companies even offer this opportunity to spouses and retirees.
Please provide details of your company affiliations below so that we can help you maximize the value of your time.*

22. Your workplace

.....

Current employee at this workplace Retired

23. Your spouse's workplace (if applicable)

.....

Current employee at this workplace Retired

24. Other memberships and affiliations: Are you in any rotary clubs? Do you attend a place of worship? Do you volunteer with any other groups? We'd love to know how you are connected in the Houston community and how we can work together to transform more lives through the doorway of literacy!



Part 3: Volunteering Interests and Availability

In this section, we'd like to gather as much information about your interests as we can.

Checking a box is not a commitment to any activity, but helps us match you to opportunities you will enjoy.

25. Which areas are you interested in? Please check all that apply.

Please ask for detailed descriptions of each role, if required.

Office/Administrative Volunteer:

General administrative help, mainly greeting people on the phone and in person.

Family Literacy Event Volunteer:

Assist with parent presentations, children's activities, book distribution, etc. at planned Family Literacy Events at local schools and community centers.

Special Event Volunteer:

Assist in planning, and/or at fundraising and awareness-raising events.

Student Registration Leader:

Lead new students through registration sessions and paperwork, using materials and script provided (training and observation also provided).

Ambassador:

Help spread the word about Literacy Advance by inviting people to tour the agency.

26. When can you volunteer? Please check (✓) **all days and times** that are **possible** for you.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<input type="checkbox"/> Morning	<input type="checkbox"/> Morning	<input type="checkbox"/> Morning	<input type="checkbox"/> Morning	<input type="checkbox"/> Morning	<input type="checkbox"/> Morning
<input type="checkbox"/> Afternoon	<input type="checkbox"/> Afternoon	<input type="checkbox"/> Afternoon	<input type="checkbox"/> Afternoon		<input type="checkbox"/> Afternoon
<input type="checkbox"/> After 5pm	<input type="checkbox"/> After 5pm	<input type="checkbox"/> After 5pm	<input type="checkbox"/> After 5pm		

Thank you! 😊





Literacy Advance *of* Houston

Confidentiality Agreement

This Agreement is made between _____ ("VOLUNTEER") and Literacy Advance of Houston on _____20__.

VOLUNTEER will perform services for Literacy Advance of Houston which may require Literacy Advance of Houston to disclose confidential and proprietary information ("Confidential Information") to VOLUNTEER (Confidential Information is any information of any kind, nature, or description concerning any matters affecting or relating to Employee's services for Literacy Advance of Houston, the business or operations of Literacy Advance of Houston, and/or the products, drawings, plans, processes, or other data for Literacy Advance of Houston). Accordingly, to protect the Literacy Advance of Houston Confidential Information that will be disclosed to VOLUNTEER, the VOLUNTEER agrees as follows.

- A. VOLUNTEER will hold the Confidential Information received from Literacy Advance of Houston in strict confidence and shall exercise a reasonable degree of care to prevent disclosure to others.
- B. VOLUNTEER will not disclose or divulge either directly or indirectly the Confidential Information to others unless first authorized to do so in writing by Literacy Advance of Houston
- C. VOLUNTEER will not reproduce the Confidential Information nor use this information commercially or for any purpose other than the performance of his/her duties for Literacy Advance of Houston.
- D. VOLUNTEER will, upon the request or upon termination of his/her relationship with Literacy



Staff: Performance Evaluations

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Tied to supervision system
There should be no surprises at the
Performance Evaluation!



Employee Self-Assessment

Name:	Employed since (month & year):
Title:	Supervisor:

1.	What were your three goals for this year?
	1. 2. 3.
	Please reflect on your progress toward accomplishing these goals. -->

2.	What competencies were you working on this year?
	1. 2. 3.
	Please reflect on your progress and experiences as you worked on these competencies. -->

3.	Please describe your contributions as a team collaborator over the past year.
	-->



Other questions include:

- Accomplishments over the year
- Selection of strengths & competencies from list
- Top three missed opportunities over the year
- Three goals for the coming year
- Desired skill development for the coming year



7.	<p>Overall, how would you rate your performance this year? Please bold your selection.</p> <hr/> <p>Exceptional: I far exceeded expectations and made lasting improvements to organizational structure.</p> <p>Great: I consistently performed beyond the scope of my job description.</p> <p>Good: I met the requirements of my job description.</p> <p>Not So Good: My performance was inconsistent this year.</p>
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Can you offer bonuses or other rewards?
If so, they should be linked to this rating.



Internship Program

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Interns can add significantly to
your capacity.
Once again, planning is key.



2017 Summer Internships – Overview

Department	Space	Internship Provider	Intern	Supervisor(s)	Start Date	End Date	Other notes
<i>Programs</i>	Programs Office	General	Viviane Mathieu	Diana, Maxine	Jun 5	Aug 25	Not with us through any specific program
<i>Development</i>	Development Office	NLA	Taylor Tardy	Melanie	Jun 5	Aug 25	June 9: Ask the Experts, AFP
		Shell	Allyson Holder	Melanie	Jun 5	Jul 28	June 9: Ask the Experts, AFP June 12, 9am – 11am: Kick-off June 14, 9am – 4pm: Service day
<i>General</i>	N/A	Bank of America	Jasmine Park	Irene, Kathryn	Jun 12	Jul 28	Will not take part in PD
	N/A		Trieu Vu		Jun 12	Jul 28	Will not take part in PD

Professional Development Schedule:

Week of June 5: General Onboarding, Story Time, Front Desk Training, New Student Registration Training (as appropriate), New Tutor Training; Email Etiquette & Outlook

Session 1 – Tuesday, June 13, 9:30am – 11am: Plain Language (Kathryn)

Session 2 – Thursday, June 22, 2pm – 4pm: Programs & Volunteer Management (Maxine & Heather)

Session 3 – Thursday, June 29, 2pm – 4pm: Communications & Branding (Kathryn)

Break during Staff Week, OR alternate date if one of the above doesn't work for someone (July 6)

Session 4 – Thursday, July 13, 2pm – 4pm: Nonprofit Finance & Governance (Irene & Sheila)

Session 5 – Thursday, July 20, 2pm – 4pm: Community Outreach & Transition Services (Khushboo & Diana)

Session 6 – Thursday, July 27, 2pm – 4pm: Nonprofit Fundraising & Evaluation (Melanie)





New Intern – Learning About Programs

Background:

The core of all Literacy Advance activities is the programs. Basic knowledge of what we do, why we do it, some of our plans for the future, and some background in adult literacy is essential for any intern to have a relevant and worthwhile internship experience. Furthermore, intern activities, reading and projects will lack crucial context and understanding without a good working knowledge of our programs. Therefore, all interns, whether based in Programs or Development, should undertake the activities below.

Strongly Recommended Activities, Learning & Training (complete as soon as possible after starting):

Info: Give brief background to Programs at Literacy Advance, using PPT, including core points:

- Clients are all adults; tutors are all volunteers; classes free to community.
- Parents and Workforce two focus areas, through ABE, ESL, Computers, etc.
- No government or state funding; instead grants, foundations, donations, fundraising.
- Where to find more information: website, Facebook, Data Library on P Drive.
- Culture focused on professionalism, appreciation and accountability.

Activities:

- Attend Tutor Training (see Maxine for dates).
- Do the “Resource Room Tour” with Maxine.
- Observe Student Registration(s) – ABE or ESL, ideally both.
- Observe Waiting Class, or Reading Practice Group, or both.
- Learn about Plain Language – do presentation with Kathryn.



Talent Management: Resolving conflict

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DISCUSS

How do you deal with conflict at work? How do you address misalignment of expectations?

Discuss with a partner



Name: _____ Dept.: _____ Date: _____

Date of Occurrence: _____ Time: _____ [] AM [] PM Location: _____

Action Taken:

Depending on the nature of the issue, Literacy Advance of Houston reserves the right to skip any steps at its discretion.

<input type="checkbox"/> Counseling	<input type="checkbox"/> Final Warning	<input type="checkbox"/> Other:
<input type="checkbox"/> Written Warning	<input type="checkbox"/> Termination	

Description of Issue:

<input type="checkbox"/> Absence	<input type="checkbox"/> Safety Violation	<input type="checkbox"/> Other:
<input type="checkbox"/> Tardiness	<input type="checkbox"/> Policy Violation	
<input type="checkbox"/> Conduct	<input type="checkbox"/> Substandard Performance	

Explanation of issue - Violation of rules, policies, standards, practices or unsatisfactory performance.

Review performance and obtain agreement on the problem and cause:

>> *Type here*



DISCUSS

What's the most difficult situation you've had to deal with, with a volunteer?

Discuss with a partner



When volunteers are not the right match...



Other conflict resolution options

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Bring in outside help:
Mediation (for example, Association
for Conflict Resolution, or ACR)
Board (recruit an HR professional)



DISCUSS

What's your SMIT
(Single Most Important
Thing) from this session?



Wrap-up:

*Questions, comments,
discussion...*



THANK YOU!



www.literacyadvance.org



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