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Procedures Manual

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Policy & Guidelines (For Both Workplace & Remote)

Google Drive:

- Username: **Internships.16Things@gmail.com**
- Password: **PAK 2020wky**

Google Drive:

- Username: **Internships.PlannedActs@gmail.com**
- Password: **Success2019!**

- Then, create a folder named your full name in capitals in the **PlannedActs** Drive, PAK [INDIVIDUAL WORK FOLDERS](#). All the work you do within the organization is to be stored in your folder.

Notebook:

- Bring a small notebook

- Create a To Do List
- Take notes during meetings
- Tips on Note Taking
 - Take notes using outline form
 - Be concise and use abbreviations

Double Checkbox System:

- Put today's date on the page.
- When writing down the tasks you have to do in your notebook, draw two checkboxes next to each of your tasks.
- Check off one of the boxes next to the tasks you started working on.
- Check off the second box once you complete the task(s).
- At the end of the day, transfer all incomplete tasks to the next day by creating a new To Do List starting with the incomplete tasks.

Post-It Note Checklist:

Tasks can get buried in your notebook during the day. As an alternative you can use Post-It Notes.

- Put today's date on the post-it note.
- Draw two checkboxes next to each of your tasks.
- Check off one of the boxes next to the tasks you started working on.
- Check off the second box once you complete the task(s).
- To the left of the checkboxes, there will be a letter. I for activities that need to be done immediately, D for activities that are done daily, AM or PM for activities that are time specific, and ND if the activity is for the next day.

Office Workspace Policy & Guidelines

Arrival Guidelines:

- At the start of the day, visit your supervisor and discuss what you'll be working on.
- At the end of the day, inform your supervisor about the progress you made during the day, what you'll be working on tomorrow, and ask if there is anything else that needs to be addressed.

Dress Code:

- Dress code is business casual. No jeans, sneakers, hoodies, etc.
- Tuck in your shirt. Look professional.

Laptops:

- If you own a laptop, bring it with you to the office.

WiFi Information:

Network Name: **PlannedActs-5G**

Password: **16Things**

Lunch Breaks (In Office Personnel Only):

- You can use the refrigerator and microwave in the office. You can bring your own cup as well.
- When you go out to buy lunch, you can eat in the office.
- Limit your lunch break to a maximum of 30 minutes.
- Be considerate of others. Don't bring in smelly food and don't make excessive noise when eating.

Taking Care of the Office

- **Keep the Office Clean**
 - Please clean up any and all mess you leave behind.
 - Mop the floor if you see it's dirty or wet
 - Wipe down tables
 - Dust off tables and computers
- **Be Energy Conscious**
 - Before leaving the office, turn off all electronic equipment to prevent the electricity bill from increasing
- **Garbage**
 - When you throw things away, push the garbage down to save space.
 - When the garbage can is full, and it can no longer be pushed down, change the bag.

Answering the Office Phone:

- Greet the person on the phone, say, "Good morning/afternoon. 16 Things and Planned Acts of Kindness, how may I help you?"
- Always ask for the following information:
 - Name
 - Organization
 - Reason for calling
- Whomever the person asks for, put the person on hold and inform the person who's being asked about the information received.
 - It also might be helpful to you if you write the information down

Remote Trainee Policy & Guidelines

Remote Personnel Procedures:

- When working remotely, text Lyle,
 - The time you start working
 - What you'll be working on
 - At the end of the day, text what you've accomplished and what you'll be working on next
 - As well as the time you're starting the next time.
- Record your progress onto a spreadsheet
- **IMPORTANT!** Communication:
 - The best way to communicate is by TEXT message.
 - When starting your work, you should text your mentor what you're working on.
 - If the subject is complex we can switch to a phone conversation.
 - Please note: We do not have email conversations.
 - When you send an email with your work, send a text message as well.

Lunch Breaks:

- Limit your lunch break to a maximum of 30 minutes.

Initial Assignments

- Submit your Full Name, Nickname if you have one, Field of Study, and your Number as well as your internship/Volunteer schedule by text to Lyle Benjamin at (917) 683-2625.
- Like us on [Facebook](#)
- Follow us on [Twitter](#)
- Share our social media pages with your friends! Including YouTube, LinkedIn & Instagram
- Sign our [petition](#) to have the President proclaim August as "National Kids Month!"
- Read the Social Responsibility Media Kit.
- Read the Social Responsibility Media Kit.
- Complete the attached form and submit with a business-appropriate photo.
- List your current courses, professors, professor emails:

Course Title:	Professor:	Prof. Email:	Class Talk Date:	Petition Sign-Ups :

Complete the following within TWO DAYS of starting your internship:

- Create a contact spreadsheet of 25 people or more that you know personally.
- Read how to start a “16 Things Social Responsibility Club” on our website.
- Send your contacts a personalized note to start volunteering today!
- Review our “Guidelines for Speaking to Classes” and practice the script.
- Ask your professor for permission to talk to your class about Internship opportunities with our non-profit educational organization.

Complete the following tasks within SEVEN DAYS of starting your internship:

- Make a class announcement about Internship/Volunteer/Career Track opportunities with our non-profit educational org. See “Guidelines for Speaking to Classes.”
- Pass around, collect & submit the Presidential Petition & Volunteer signup sheet.
- Start your own “16 Things Social Responsibility Club”

Procedures & Tips

Tips for Learning Scripts:

- When practicing scripts, say it out loud with enthusiasm and energy.
- Say it exactly the way it was written and conversational at the same time.
- Make the connection, give the other person their objectives.
- When you make a mistake, start again at the beginning to develop the memory.
- Memorize one paragraph at the time to make the memorization more manageable.
- When practicing out loud, practice as if you’re speaking to a person in a real-world situation so take your time.
- It also helps to have a family member or friend you could use for additional practice. That way they can give you feedback on how you did.

Creating a Proper Outline:

- **Research:** If you don't know how to create an outline properly, research online how to properly create one
- **Creating New Document:** Be specific when naming the document. Add a title also.
- **Outline Components:** Use headings and subheadings. Include the main points under the headings. Make sure they're in logical order. Do NOT write a report outline. Also use Bullet points unless told otherwise.
- **Font:** NEVER use serif fonts. Use Calibri font, body size: 12 pt, Heading 1: 14 pt, Single space paragraphs.
- **Self Analysis:** Always proofread out loud, make sure it sounds conversational and business professional. Be consistent and pay attention to detail. Always have a reason for the things you do; don't do things randomly.
- **Information:** When you have too much information in your outline, make a copy of the document and edit out the excess information and paste it in another place because it may be used in the future.
- **Style** means the font, ordered (alphabetically if needed), colors, spaces, alignment, consistency (keep your outline consistent).

Pay attention to details - give one of the team members to review your outline before you show it to Lyle.

Creating a Proper Spreadsheet:

- **Naming the File:** As with the outline don't use generics names, be specific with the title.
- **Freeze First Row:** Always freeze the first row. In order to do that, click on VIEW, FREEZE, 1 ROW
- **Initial Four Columns:** At the first four columns, always add the following:
 - Date
 - Follow Up
 - Notes
 - Status
- **Recording Names:** Make separate columns for each of the following components:
 - First Name
 - Last Name
 - Position

- **Recording Contact Information:** Make separate columns for the person's contact information:
 - Email
 - Phone Number: When recording phone numbers, use hyphens to separate the digits into groups of threes
 - Extension
 - Fax
- **Recording Addresses:** Separate the full address into the following components:
 - Street Address
 - Suite
 - City
 - State
 - Zip

Taking Notes on Spreadsheets:

- Under Notes column:
 - CB = Call Back
 - WCB = Will Call Back
 - VM = Left Voicemail

Tips on Searching up Documents/Files in the Google Drive

- First type up the Document's name and determine the type of document that you're looking for. For example: If you're searching for "Procedures Manual" you type "Procedures Manual.doc." .doc is the type of file you want to search for this example.
- You can also look up the date of the Document if you can't find the document.

Email Procedures:

- **Creating Emails:** When writing, use the active voice and be direct. Use san-serif font and short paragraphs to make the email more appealing to read. Always include a call-to-action.
- **Attachments:** Include all the attachments needed in the best, logical order.
- **Signature:** Add your name and title above Lyle Benjamin.
- **Review:** Proofread the email to make sure it sounds conversational & email to internships to get Lyle's approval before sending. When sending the email again, if necessary, please delete all prior emails to prevent Gmail from ruining the format.
- **Sending Emails:** When sending emails to multiple addresses, add them all under Bcc.

Calendar Entry for Meetings

- When arranging a time for a meeting, the following information must be included:
 - Type of entry in parenthesis
 - Name
 - Organization
 - Phone
 - Website
- Legend for Type of Entry
 - IO = Internship Orientation
 - WO = Work Orientation
 - M = Meeting
 - CF = Career Fair
 - RD = Registration Deadline
 - ED = Event Day
 - FD = First Day
 - V = Volunteer

Tips for Phone Calls:

- **Controlling the conversation:** Get straight to the point. Ask questions to make the other person get to the point also. Give & get the information you need and end the conversation strong.
- **Ending phone calls early:** If you need to cut the conversation short, let the person know that you have a meeting to attend and will get back to them as soon as possible.
- **Giving Context:** When speaking to someone that you've met within 2 weeks - 1 month ago, give the personal context of who you are, where you're calling from, and where the two of you met.

Outreach Calling Procedures:

- Call the person you need to call or leave a voicemail
- Email the person the necessary materials
- Follow up by phone. Speak to the person or leave another voicemail.
- Email the person the materials again
- Call again and make sure you speak to the person.
- When you come into the office, within 10 minutes you should be making outreach calls.
- The phone calls should take a maximum of two minutes
- For follow up calls with Lyle's appointments, send them an email with calendar invites and then let them know you sent some times for Lyle and them to speak again.

Time Management

- During the course of your internship/volunteering, you'll be given multiple assignments. Be conscious of the amount of time you are spending on each assignment. To be more efficient with meeting deadlines, follow these tips:
 - Small assignments should be completed promptly.
 - Medium assignments should be completed within 1 to 3 days. Work on it daily after completing shorter assignments.
 - Larger assignments may be completed over a longer period of time. As such, work on it consistently each day. If you have no other assignments to complete then you can devote more time to its completion after checking with your supervisor to make sure that there are no other pressing objectives.

Finishing Assignments

- As a general rule of thumb, you should stop working when you get your assignments either (1) completely done or (2) to a logical stopping point. Both are not based on a strict exit time unless you have an emergency, or you have a plane, bus, etc. to catch.
- When you complete an assignment, notify Lyle that the assignment is complete and show him the end result.

Networking:

- When coming across people that want to learn more about what we do. Record their contact information, arrange a time for them to come into our office and go through an orientation, email the person with our 16ThingsKidsCanDo Program Guide attached.

Trainee Tips

- TRAINEES SHARED TIPS in the google drive, is where the trainees add all the tips they get from their supervisors, so the rest of the team can learn from it. So take a look and please when you get a tip, add it to the spreadsheet (follow the the previous *format of filling the spreadsheet). Here is the [TRAINEES SHARED TIPS LINK](#).

*format - As size, font, color and ext.