OPERATIONS PROCEDURES

Junior Achievement™
of Greater Boston

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EVENTS TIMELINE

	1 Month Prior	3 Weeks Prior	2 Weeks Prior	1 Week Prior	Less than 1 week Prior	Day of Event	1 Week Post Event
Request Form	X						
External Orders		X					
Final Run of Show			X				
Pre-Event Arrangements					X		
Item Drop Off					X		
Event Execution					X	X	
Event Retrospective							X

SURVEY TIMELINE

	1 Month Prior	3 Weeks Prior	2 Weeks Prior	1 Week Prior	Less than 1 week Prior	Day of Event	1 Week Post Event
Submit Operations Request Form	X						
Survey Draft 1		X					
PM Feedback			X				
Survey Draft 2			X				
Educator Feedback			X	X			
Final Draft Published				X	X		
Pre-Survey					X	X	
Post-Survey/ Feedback						X	X
Evaluation						X	X

MARKETING TIMELINE

	1 Month Prior	3 Weeks Prior	2 Weeks Prior	1 Week Prior	Less than 1 week Prior	Day of Event	1 Week Post Event
Immediate Need Request					X		
Single Document Request				X			
Major Event Request		X					
Small Event Request			X				
Signage/ Printing Request			X				
Packet/ Slide Deck Request			X				
Content Request				X			
Blog Post Supporting Information				X			
FY Impact Report Contributions			X				

EVENTS PROCEDURE

EVENTS **PROCEDURE**

1.1 Event Logistics

- The Event Planning process begins with the Education Manager(JA staff responsible) submitting an **Operations Support Request Form** with a minimum lead time of 1 month. The form covers essential details such as:
  - **Registration** – a creation of a signup form through qGiv for our external participants
  - **Food & Beverage** – any meal, snacks, and beverages for consumption
  - **Audio Visual** – amplifying sound or voice
  - **Furniture Rental** – if the venue is unable to provide all the furniture needed.
  - **JA Branding** – All events MUST display JA branding throughout the entire duration.
  - **External Orders** – Tailored orders purchased outside of the organization for the event. o If an Education Manager plans to place an external order, they should submit the form three weeks in advance for research, proposal, and delivery purposes.

EVENTS **PROCEDURE**

1.1 Event Logistics

- Following the submission of the form, the Event Coordinator will thoroughly examine the responses, assess the event requirements, and arrange a meeting with the Education Manager to discuss and clarify event logistics deemed necessary for the event.

- After clarifying event logistics, the Event Coordinator will communicate the Education Manager's event requirements to the Director of Operations and subsequently the Chief of Operations. This discussion will cover the form-submitted requirements and any associated costs. Approval from both the Director and Chief is required for the Event Coordinator to proceed. The Education Manager may be included in this discussion in case any questions arise.

- Once the logistics are approved by the Director of Operations and Chief of Operations, the Event Coordinator will proceed with any event requests that must be placed in advance (i.e. External Orders, Food and Beverage, AV, Furniture Rentals, etc.) to ensure the requests are delivered by the event date. The Event Coordinator will follow up on these requests with the Education Manager by communicating when the task has been completed.

1.2 Event Design

- Subsequently, the Event Coordinator will set up an additional meeting with the Education Manager to go over the detailed agenda of the event. In this discussion, the Education Manager will elaborate on their expectations for the event. The Event Coordinator will support the Education Manager by offering feedback and identifying any discrepancies in the timeline.

- The Event Coordinator will also inquire about supporting the Education Manager in preparing additional materials, which could encompass setup, the run of show, staffing, and any other on-site requirements as determined by the Event Coordinator.
    - Please note that this does not imply the Event Coordinator is tasked with creating your event's run of show, staffing details, and other requirements. It is essential to address these aspects in the meetings to avoid any disruption to the Event Coordinator's ongoing assignments.

- After completing all pre-event arrangements, the Event Coordinator will assess any pending tasks that require attention 3-4 days before the event, such as retrieving items from storage, sending over any materials to print, or making any last-minute purchases.
    - Please ensure a thorough review of the JA Master Inventory Sheet.

EVENTS **PROCEDURE**

1.3 Event Execution

- On the day of the event, the Event Coordinator will ensure all required items to execute the event are prepared, ready, and available at the event venue.
  - This includes any items from the storage unit, materials to be printed, and external orders.

- The Event Coordinator is expected to be present at the event venue at least 30 minutes before the designated set-up time specified in the Operations Support Request Form.

- Upon arrival, the Event Coordinator will conduct a thorough inspection of the event space to ensure all necessary arrangements, based on previous discussions, are in order.
  - The Event Coordinator will ensure that the arrangements align with the Education Manager's vision before proceeding with the set-up.

- The Event Coordinator will initiate and supervise the set-up process, collaborating with relevant personnel to ensure a seamless and efficient arrangement of event elements.

- The Event Coordinator and the Education Manager will jointly review the run of show and staffing details, with the Event Coordinator assisting in task delegation.

- Throughout the event, the Event Coordinator will maintain continuous communication to ensure smooth operations.

  Following the event's conclusion, the Event Coordinator will commence the breakdown process and return any items to the storage unit.

1.4 Event Evaluation

- Following the event conclusion, the Event Coordinator will schedule a short meeting to debrief the details we “Learned, Loved, Lose, and Longed for” from the event. Evaluating an event after it has occurred is crucial for assessing its success, identifying areas for improvement, and making informed decisions for future events.

- The meeting will consist of the attended staff. The event coordinator will be responsible for obtaining these details and recording them on the “Event Retrospective Sheet.”

- Once these details have been recorded in the Event Retrospective Sheet, the Event Coordinator will input the document in Dropbox.

SURVEY **PROCEDURE**

SURVEY **PROCEDURE**

2.1 Survey Creation Process

- Contact the Operations Coordinator a minimum of 2 weeks- 1 month before the start of the program for survey creation and implementation planning.

- The Education Manager fills out the **Operations Support Request Form**.
  - The Education Manager provides program details to determine the resources needed for the survey.
    - Details include location, date/time/duration, program type (self-select or required), age group/grades, number of participants, and program format (day event, in the classroom, etc.).
  - Please also note if the survey needs to be translated into other languages. We will do our best to accommodate these needs if time allows (additional two-week notice, four weeks before the event).

- The Operations Coordinator will send a draft of the pre and post-survey one week after form submission on JA Analytics Pathway System (JAPAS) for review. Education staff will review content, difficulty of questions, and relevance to the program and respond with questions or approval.
  - The Operations Coordinator will schedule a meeting as needed to discuss edits if the survey is not already created or does not reflect the content of the current program.

- Make connection between the Operations Coordinator and the appropriate educator/teacher to request permission/inform them of the survey process (1 week prior to the program). Educator survey feedback is crucial. Send educator survey draft for review of content, difficulty, etc.
  - If unsure if this step is connection, please review with the Operations Coordinator.
- Upon approval from the Education Manager and Educator, the Operations Coordinator will publish the survey (cannot be changed after this step).

SURVEY PROCEDURE

2.2 Survey Implementation

For JA conducted surveys:
JA conducted surveys are for programs where JA will be surveying at the time of the event on JA iPads. This will occur at events not associated with a specific school, where students self-select to participate, or programs taking place in schools that prefer JA to manage the survey process.

- Include 10-20 minutes at the program's start (for pre-survey) and end (for post-survey) for survey taking.

- The Operations Coordinator will load surveys onto iPads before the event and transport iPads to the event.

- Announcement will be made to convey the purpose of the survey, and a test-taking environment will be set.
  - Purpose of survey: Surveys are essential to track Junior Achievement's impact, allowing us to continue receiving funding and having programs like these. Your name will not be attached to the survey, so please answer as honestly as possible.

- iPads will be collected, and the process will be repeated for post-survey.

Note: If you cannot fit time for a survey into the schedule, ensure that the educator(s) associated with the program will prioritize pre- and post-survey in their classroom before and after the event.

SURVEY **PROCEDURE**

2.2 Survey Implementation

For Educator/Student conducted surveys:
Educator/student-conducted surveys are for programs where pre and post-surveys will be sent to educators in advance of the start of the program, and they will be in charge of conducting the survey-taking process with their school's resources.

- Instruct educators to conduct a pre-survey before any programming begins. This should be done in a quiet, independent, test-taking environment.
  - The Operations Coordinator will confirm the completion of the pre-survey before the program begins.

- Repeat the process for post-survey on the last day of the program.

For Educator and Volunteer surveys and testimonials:
Educator/volunteer surveys will be given to gather feedback and testimonials towards the end of an event.

- Surveys will either be handed out at the event (preferred) or sent out after if time at the event does not allow.
- Include ~10 minutes at the end of the event for educators and volunteers to complete the feedback survey.

SURVEY PROCEDURE

2.3 Reporting

- The Operations Coordinator will gather pre and post-survey data.
- Data from pre and post will be matched through a unique identifying code (first three letters of first name and last name + birthday and month).
- Data will be analyzed in Power BI through visualizations.
- Knowledge data will be organized by learning objectives.
- The final report will be shared in Dropbox at most one week after the end of the program.

Timeline

	1 Month Prior	3 Weeks Prior	2 Weeks Prior	1 Week Prior	1-5 Days Prior	Day of Event	1 Week Post Event
Submit Operations Request Form	X						
Survey Draft 1		X					
PM Feedback			X				
Survey Draft 2			X				
Educator Feedback			X	X			
Final Draft Published				X	X		
Pre-Survey					X	X	
Post-Survey/ Feedback						X	X
Evaluation						X	X

SURVEY **PROCEDURE**

Notes

- 20 iPads
  - Password: 042822
- Two hotspots
  - Franklin T105405
    - Password: 5a432cfa
  - Franklin T107773
    - Password: 37c6fec2
- Tips to think about when reviewing survey questions
  - Are the answers to these questions being taught?
  - Will the students understand the wording of the questions based on their school level?
  - Pay attention to the length of the survey.

MARKETING PROCEDURE

MARKETING **PROCEDURE**

3.1 Collateral Requesting

The collateral requesting procedure is for one-off collateral needs and major collateral projects. **Major event-specific collateral will fall under major events procedures.**

- All requests should be submitted using this project's **Operations Support Request Form**, not via email.
  - Any necessary ongoing communication regarding the request will occur within the comments in Asana to ensure everything remains in the same place.

- Urgency will be broken down by category
  - **Immediate Need – 3 Days or Less**
  - **Needed within two weeks**
  - **Needed by a specific date – Note: There is a second question in the form to provide the exact date**
  - **Backlogged Need – Complete as soon as the schedule allows**

- Lead times for Collateral
  - **Single Document Requests** – Flyers, One-Pagers, Funding Documents
    - One Week Minimum- with all information provided
  - **Major Events**
    - 3 Month minimum
  - **Small Events**
    - 2 Week minimum
  - **Signage or Printing Needs**
    - Two weeks for single collateral needs 2-4 weeks for multi collateral
  - **Packets or Slide Decks**
    - Two weeks with all information provided, four weeks with pending information

MARKETING **PROCEDURE**

3.1 Collateral Requesting

- All collateral will go through a drafting process with necessary parties for feedback and edits.
  - For **time-sensitive collateral**, please provide a draft due date in the Asana form to ensure adequate time for edits upon feedback.
  - Feedback is requested **within 24 hours** of receiving the draft. Updates from the Marketing Coordinator will be returned within 24 hours of receiving feedback. If the 24-hour return deadline is not attainable by either the Point of Contact or the Marketing Coordinator, a realistic due date will be provided upon receiving a draft or feedback.
  - If multiple parties are involved in the draft review and providing feedback, the **Point of Contact** is responsible for collecting feedback from those parties and delivering it to the Marketing Coordinator within the deadline.
  - This process will repeat for each step of the drafting process.

Notes:

- The Marketing Coordinator will always strive to complete requests within the selected urgency timeline, but requests are subject to prioritization of the current workload.

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- Please be conscious of whether your need is urgent or backlogged. The Marketing Coordinator will work diligently to catch all departments up on backlogged needs but needs to prioritize urgent, time-sensitive needs.

MARKETING **PROCEDURE**

3.2 Major Events

Major Events include: Stock Market Challege, Golf Classic. Summer Institute, and JA Inspire

What The Marketing Coordinator Provides for Major Events

- **Social Media Campaign**- (see example at the end of this document)
- **Press Release**
- **Brand guideline-compliant collateral and signage**
- **Media Plan** - (see example at the end of this document)
- **Content Outline** for JAGB Promo and Funding Deliverable needs
- **Post-Event Follow-Up Content**

Major Events Marketing Planning Process

- All major events will involve an Event Marketing meeting between the Marketing Coordinator and Point of Contact to establish a timeline for marketing deliverables
  - This will include any necessary additional parties
- Prior to the Event Marketing Meeting, The Point of Contact should complete the **Operations Support Request Form** in the FY24 Request for Operations Support Asana project

  Information requested in the Operations Support Request
  - The lifecycle of the corresponding program
  - General information and timeline of the event
    - is this a one-day event or multiple day event
    - approx. how many attendees
    - what is the objective of the event
    - Any relevant external parties to be highlighted are the sponsors, board members, participating schools, etc.
  - Outline of collateral needed to support this event, such as development documents for sponsors, flyers, signage, and any other marketing deliverables required.

MARKETING **PROCEDURE**

3.2 Major Events

Major Events Marketing Planning Process cont.

- Upon establishing a plan for all collateral needed for the event, a **Collateral Plan** will be entered within your event's task in the **Major Events Marketing Asana Project** as a subtask. The collateral subtask is where any forthcoming information or attachments should be communicated.
    - Collateral Plan will outline all collateral needs with projected information due dates, first draft due dates, and final due dates for each piece of collateral.

All collateral will go through a drafting process with necessary parties for feedback and edits.

- For **time-sensitive collateral**, please provide a draft due date in the Asana form to ensure adequate time for edits upon feedback.
- Feedback is requested **within 24 hours** of receiving the draft. Updates from the Marketing Coordinator will be returned within 24 hours of receiving feedback. If the 24-hour return deadline is not attainable by either the Point of Contact or the Marketing Coordinator, a realistic due date will be provided upon receiving a draft or feedback.
- If multiple parties are involved in the draft review and providing feedback, the **point of contact** is responsible for collecting feedback from those parties and delivering it to the Marketing Coordinator within the deadline.
- This process will repeat for each step of the drafting process

Note:

- It is better to submit your request outlining ALL of your needs for the event, even if you do not have all the information to support the request.
- If your supporting information is pending, the request should include any supporting information you have currently, with a prospective due date for the missing information.

MARKETING **PROCEDURE**

3.3 Small Events

Small events are in-person events that may or may not occur annually. As a general way to determine if an event is Small or Major, Major events are all hands on deck, and small events are not mandatory for all staff. Small Events could include JACP Seed Funding, 3DE Presentations, and Tabling opportunities.

What The Marketing Coordinator CAN provide for Major Events

- **Mini Social Media Campaign**
- **Brand guideline-compliant collateral and signage**
- **Media Plan –** provided if media are attending
- **Content Outline** for JAGB Promo and Funding Deliverable needs
- **Post-Event Follow-Up Content**

Small Events Marketing Requesting Process

- Small Events Marketing Requests should be submitted through the Operations Support Form, not via email.
    - Any necessary ongoing communication regarding the request will take place within the comments in Asana to ensure everything remains in the same place

Information requested in the Operations Support Request

- The lifecycle of the corresponding program
- General information and timeline of the event
    - is this a one-day event or multiple day event
    - approx. how many attendees
    - what is the objective of the event
    - Any relevant external parties to be highlighted, such as sponsors, board members, participating schools, etc.
- Outline of collateral needed to support this event, such as development documents for sponsors, flyers, signage, and any other marketing deliverables required.

3.3 Small Events

All collateral will go through a drafting process with necessary parties for feedback and edits.

- **For time-sensitive** collateral, please provide a draft due date in the Asana form to ensure adequate time for edits upon feedback.
- Feedback is requested **within 24 hours** of receiving the draft. Updates from the Marketing Coordinator will be returned within 24 hours of receiving feedback. If the 24-hour return deadline is not attainable by either the Point of Contact or the Marketing Coordinator, a realistic due date will be provided upon receiving a draft or feedback.
- If multiple parties are involved in the draft review and providing feedback, the **Point of Contact** is responsible for collecting feedback from those parties and delivering it to the Marketing Coordinator within the deadline.
- This process will repeat for each step of the drafting process.

MARKETING **PROCEDURE**

3.4 Marketing Schedule

Note:
Marketing schedules tasks should only be marked complete by the Marketing Coordinator. Subtasks assigned to other staff members may be marked complete by those staff members, but the Marketing Coordinator will mark the overall task when the post is scheduled.

Education Team Staff

Education Team Staff is responsible for keeping the Marketing Coordinator informed of what is going on in their programs. This information will be used for social media content, blog posts, and other promotional materials.

- Each member of the Education Team will be responsible for entering 1-2 days' worth of postable content in the Marketing Schedule on Asana linked here **FY24 Marketing Schedule**.
- Education Managers will be tagged in advance for the days they are responsible for
- If an Education Manager does not have enough content for a second post in any given month, the Education Manager is responsible for connecting with the Director of Education and the Marketing Coordinator within the task for the day they cannot provide content for to come up with a plan for how to fill that day.

3.4 Marketing Schedule

Education Team Staff cont.

- Ideas to fill assigned day include
  - Testimonial from a student, educator, volunteer, etc, from their program
  - Some testimonials are obtained through surveys. Connect with the Operations Coordinator as needed.
  - Updated stats from their program
  - Student, educator, and volunteer spotlight from their program
  - Interview with students, educator, and volunteers from their program
    - This would need to be planned in advance for a time known to be sparse for their program content. For example, an interview could be scheduled and conducted during the school year to post over the summer
    - Ask if someone from the Education Team has something to fill that post day. Note* This would be in addition to their assigned days not in place.

- If a particular Education Manager's program is not run throughout the entire year, the education manager should collect enough content during their program run to support their assigned Marketing Schedule days for the entire year.
- Content should be entered with a **minimum of 1 week's notice** to their posting date to allow time for the Marketing Coordinator to create and schedule content.
- **Exception:** If the Education Manager includes a photo from an event that has not yet happened, the EM can include all other information in the Marketing Schedule and note when that photo will be provided. Post information should still adhere to 1 week advance notice.

3.4 Marketing Schedule

What information should be included on the Education Manager's assigned Marketing Schedule days:

- Who, what, where, when
    - This should be a brief but detailed context of what is being posted about
- Photo
    - All posts should include a photo
- Any tagging requirement
    - **Ex.** Staples sponsored this event, or Delta volunteered at this event
- Due date for missing information
    - **Ex.** Photo will be provided on 2/16 after the event on 2/15

Other Staff

Staff Members outside the Education Team should contribute to the Marketing Schedule as often as possible based on when they have applicable content. The goal of our social media is to increase our brand recognition and engagement.

Content Ideas:

- Community Engagement
    - Take a picture at a meeting with a major partner's company signage to shout out partners.
    - Tabling events
    - Networking events
- Developmental Achievements and Updates
    - Announcements of new partnerships, donors, etc.
    - Grant Acquisition
    - Impactful Statistics used in Grant Applications
    - Developmental Initiatives

MARKETING **PROCEDURE**

3.4 Marketing Schedule

All Staff

- **Employee Spotlights**
  - Each staff member will be tagged on 1 Marketing Schedule Day for an Employee Spotlight throughout the year. This will be similar to your description on our staff page on our website, a brief about you, and your "why" for being a member of the JA team. Staff members will provide this brief blurb within their tagged Marketing Schedule day.
- **Team Candids**
  - Teams should periodically provide candids of their team at work to be showcased in "a day in the office" or "Education Team hard at work" type posts.

3.5 Backlogged Needs

- All backlogged needs should be entered using the Operations Request Form, not through email, and provide as much detail or information as possible.
  - Ongoing communication regarding these needs will take place within the Asana Project.
- The Marketing Coordinator will work diligently to catch all teams up on backlogged needs, but due dates are subject to approval based on the current workload. If the requested due date is not attainable or the project is running behind schedule, the Marketing Coordinator will provide new dates.
- All collateral will go through a drafting process with necessary parties for feedback and edits. If multiple parties are involved in the draft review and providing feedback, the **Point of Contact** is responsible for collecting feedback from those parties and delivering it to the Marketing Coordinator. This process will repeat for each step of the drafting process.

3.6 Departmental Marketing Check-ins

- The Marketing Coordinator will meet with Department Heads twice a year to connect about marketing needs. The purpose of this is to ensure each department has everything currently needed to sustain the department (regarding marketing and collateral) and brainstorm any additional needs the marketing coordinator may be able to provide to promote growth, awareness, brand voice consistency, etc.
- This does not mean that Department Heads need to wait for the bi-annual Check-In Meeting to discuss needs; this is simply to ensure there are consistently scheduled meetings to check in and offer support.
- If twice annually proves to be more than is necessary, particularly after all backlogged marketing needs have been met, this may transition to once annually.

3.7 Content Collection for Blog Posts and Monthly Constant Contacts

Blog Posts

- Blogs will be posted at a minimum of once a month, more frequently, as content availability allows.
- Preplanned Monthly Blog Post topics will be shared in the Marketing Schedule with the team in advance to request any supporting information the team may have.
  - Supporting information is requested to be provided no later than one week before the date of the Marketing Schedule entry to allow time for drafting.
  - Supporting information should be entered within the comments of the Marketing Schedule entry.
- Staff can send blog topic ideas to the Marketing Coordinator.

MARKETING PROCEDURE

Monthly Constant Contact JAGB Update

- A Constant Contact will be sent out monthly
  - The goal of the monthly Constant Contact will be the past month in review, and look forward to the upcoming month.
- All Education Managers will be asked to provide an update on their programs to be highlighted.
- The Development team will be asked to provide any updates, success stories, upcoming campaigns, etc., to be highlighted.
- Management will be asked to provide any additional updates to be highlighted.
- The Constant Contact release date will be entered into the Marketing Schedule.
  - Education Managers will be tagged individually within the subtasks of the Marketing Schedule entry to provide their updates.
    - Updates should be provided within the comments of the subtask
  - The Development Team will be tagged in one collective subtask
    - Updates should be provided within the comments of the subtask
  - Management will be tagged in one collective subtask
    - Updates should be provided within the comments of the subtask

3.8 Content Collection for Annual Impact Report

At the end of the FY, an Asana project will be created for the 23-24 FY Impact Report. Subtasks will be assigned to the appropriate staff member for the following:

- Opening Letter
- Program Spotlights include but are not limited to:
  - JA Summer Institute
  - Afterschool JA Company Program
  - JA Career Pathway for Alumni
  - CGI IT Girl Challenge
  - JA Stock Market Challenge
  - JA Inspire
- JA Innovation Center at RSM
  - JAIC in Lawrence update
- JA Student of the Year
- Student Impact
- Volunteer Highlight
- JA School of the Year
- Giving
- Board List
- Staff List
- Photos

All written sections are to be completed in MS Word and uploaded in the corresponding task. All content will have a 2-week due date from the fiscal year's end, allowing ample time for design and drafting. The final draft of the Impact Report will be due at the end of August.

3.9 Brand Compliance Review

To have any document or collateral, internal or external, reviewed for brand compliance, Staff will submit a request in the **Operations Support Request Form**.

Internal Reviews

The internal Brand Compliance review process is for any branded documents or collateral created by team members. It is essential that we maintain a seamless brand voice in all documents and collateral. This review will also support maintaining that brand voice and ensuring compliance with our **Brand Guidelines.**

Internal Review Requesting Process

- Internal Review Requests should be submitted through the Operations Support Form, not via email.
    - Any necessary ongoing communication regarding the request will occur within the comments in Asana to ensure everything remains in the same place.

Information requested in the Operations Support Request

- Link to document to be reviewed.
- Due date for review.
- Any additional information or context needed for review.

MARKETING **PROCEDURE**

3.9 Brand Compliance Review

External Reviews

The external Brand Compliance review process is for any branded documents, collateral, or press releases created by an external source. It is essential that we ensure any use of our brand, logos, or name is compliant and represents Junior Achievement of Greater Boston in the best way possible.

External Review Requesting Process

- Internal Review Requests should be submitted through the **Operations Support Request Form**, not via email.
  - Any necessary ongoing communication regarding the request will occur within the comments in Asana to ensure everything remains in the same place.

Information requested in the Operations Support Request

- Name of the Company
- Contact at Company (if you are connecting the Marketing Coordinator with the Company's marketing team and don't have the contact name, write "Marketing Team.")
- context to what is being reviewed
- Due date for review
- any additional information or context needed for review

CONTACT

Events:

Alexis Yang
ayang@jagreaterboston.org

Surveys

Esha Dagli
edagli@jagreaterboston.org

Marketing

Katie Desmarais
kdesmarais@jagreaterboston.org

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