# Job Training Manual

I created this manual for a nonprofit educational organization located in Seattle, WA.

## The audience

The audience for the manual is the organization's Administrative Assistant/Database Manager (AA/DBM). Additional users of the manual include the General Manager, to whom the Administrative Assistant/Database Manager reports, and the organization's Founder.

## The team

I worked with the Founder and the General Manager to create the first draft of the manual, and then collaborated with the newly-hired AA/DBM during her onboarding and training period to document additional procedures.

## The details

The Table of Contents lists main job functions by chapter, and hyperlinks enable the user to jump directly to a chapter or page of interest. Information is presented in short paragraphs and bulleted lists for ease of reference, and important checklists are denoted by a checkmark icon.

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# Job Training Manual

## Administrative Assistant/Database Manager

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Tree Canopy Coalition
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# History of the Organization

The Tree Canopy Coalition (referred to in this manual as “the organization”) was founded in Seattle, WA in 1987 by Cass Turnbull. The organization’s mission is to provide arboricultural and horticultural education to both industry professionals and the general public. Most of this education is accomplished by initiation and/or participation in the following types of events:

- Classes
- Hands-on workshops
- Lectures and presentations
- Booths at public events
- Industry conferences

# Overview of Organizational Hierarchy

The organization has official status as a 501(c)(3) nonprofit foundation and is governed by a six-member board of directors. Cass Turnbull serves in the capacity of Executive Director, and is referred to by that title in this manual.

The part-time Administrative Assistant/Database Manager (AA/DBM) position is one of three paid administrative positions within the organization. The Volunteer Coordinator (VC) is a part-time position, while the General Manager is full-time. The AA/DBM and the VC report directly to the General Manager.

# Administrative Assistant/Database Manager Job Description

The AA/DBM plays a key role in the organization, with responsibilities that involve both office support and field assistance.

## Work Hours and Schedule

The AA/DBM position is part-time, with 24 hours being the standard weekly workload. During times when the organization is involved in special events, the workload may temporarily increase to as much as 30 hours per week. Special events include, but are not limited to, the Northwest Flower and Garden Show in February, the Holiday Party in December, Horticultural Bingo in September, and various other educational and fundraising events throughout the year.

This position occasionally requires working on weekends, holidays, and evenings. The AA/DBM is expected to coordinate with the Office Manager to develop a joint work schedule. This schedule will provide for the AA/DBM, the Office Manager, or both to be in the office for four to six hours, Monday through Friday. The specific hours spent in the office are somewhat flexible as long as they occur between the normal business hours of 8 am and 5 pm.

## Job Responsibilities

The AA/DBM position involves a wide range of responsibilities. Regular work duties are listed below.

### General Office

- Answer incoming calls, check voice mail on a regular basis, and return calls in a timely manner
- Check email multiple times each day and respond to emails in a timely manner
- Process donations, workshop fees, memberships and other payments; prepare checks for deposit and maintain records of PayPal transactions
- Maintain a neat and organized environment including the office, conference space, events room, literature shelves, and storage area
- Pick up mail three times per week; open, sort, and distribute mail to intended recipients
- Mail literature, books and other merchandise as needed
- Maintain adequate balance in Bulk Mail and Postage Due accounts
- Deliver newsletters and other material to Bulk Mail station as necessary

### Membership

- Process renewals and new memberships and send out welcome packets
- Maintain members' volunteer hours and activities in database
- Track membership statistics for use in newsletter and in summaries for board meetings

### Meetings, Events, and Workshops

- Prepare and send digital announcements and reminders for meetings, events, and workshops
- Register participants, create class rosters, manage cancellations, and maintain waiting lists for events requiring advance sign-up

**Meetings, Events, and Workshops, continued**

- Coordinate with instructors and guest lecturers to provide audio/video equipment, handouts, literature and other supplies as necessary
- Assist in planning, preparation, execution and takedown of events
- Procure food, beverages, signage, supplies, and other materials as necessary
- Organize, pack, and transport literature, supplies, and other materials for events and meetings
- Inventory and return all materials to proper locations following events

**Fundraising and Donations**

- Prepare materials for fundraising campaigns; process donations, record data, track major donors
- Generate thank-you letters to major donors, obtain Executive Director's signature, and mail
- Write and send email or handwritten thank-you notes to all other donors

# Chapter 1: Tracking Time and Expenses

## Timesheets and time tracking

Timesheets are Excel documents located in Administrative Files > Timesheets. The existing blank timesheet should be renamed according to the current pay period using "save as" to preserve the template. Record tasks performed and the time associated with each task according to category:

- Phone communication
- Email communication
- Mail management
- Membership management
- Fundraising campaigns
- Literature and merchandise sales
- Meetings and events (specify event)
- Donations and acknowledgements
- Digitizing documents
- Other (specify)

## Timesheet submission and pay periods

- Print out timesheets and place in the Bookkeeper's folder every other Tuesday afternoon.
- Once paid, move the digital copy of the timesheet to the "Paid Timesheets" folder.
- Paychecks are normally issued on Friday, three days after the pay period ends.
- The pay schedule may vary slightly in the event of a holiday or weather-related office closure.

## Expense reimbursement

Reimbursable expenses include:

- Mileage expense for official business
- Out-of-pocket costs such as parking fees at the Flower and Garden Show
- Incidental items purchased with personal cash

Reimbursement forms are located in a folder atop the office credenza. Place completed reimbursement forms in the Bookkeeper's folder.

## Receipts

Receipts for all purchases using the Tree Canopy Coalition debit/credit card must be immediately categorized and promptly submitted to the Bookkeeper.

✓ **Follow the outline below to record and submit receipts:**

1. Record all expenses on the tracking sheet. This sheet is attached to a large manila envelope stored on top of the office credenza.
2. Note any information about the specific purpose of the purchase on the tracking sheet.
3. Place the receipt in the envelope. In cases where no receipt is available, provide a written description of the purchase, the expense amount, and the date the expense was incurred.

## Petty Cash and Change

- Cash may be withdrawn at an ATM using the debit card.
- The withdrawal receipt and the purpose of the cash are recorded on the tracking sheet as noted above in the section on "Receipts".
- All petty cash and change for events is stored in cash boxes locked in the file drawer.
- For more information on the amount of change needed for events, see "Change" under Chapter 7, Event Procedures.

# Chapter 2: Postal Accounts and Information

## Post Office Location

The organization's post office box is located at the Wedgwood Post Office; the box number is 1294. Mail is usually picked up three times per week, with Monday, Wednesday, and Friday being the typical days to make a mail run.

## Bulk Mailing Account and Postage Due Accounts

The numbers for these postal accounts may be found in Administrative Files > Tracking Sheets > Postage Tracking. In addition, there is a Shortcut on the desktop titled **Bulk Mail Account** that contains essential information about the account.

✓ **Follow these steps when managing the postal account balances:**

1. Have the account numbers available at the Post Office when checking the balance or transacting any business within the accounts.
2. Deposit $200 to $500 in the Bulk Mail account as necessary to maintain a balance of approximately $500. For the Postage Due account, maintain a minimum balance of $30.
3. Use the bank card as a *debit card*, as credit cards are not accepted for deposits to accounts.
4. After depositing funds, enter the amount from the receipt into the spreadsheet in the Postage Tracking folder and update the balance.
5. Check the account regularly to manage the balance, particularly before any bulk mailings.

**Note**: Newsletters are mailed quarterly by a bulk mailing service, and 200 pieces is the minimum number for a bulk mailing. If sending an individual newsletter to a new member, the newsletter must have the correct postage affixed and the stamp must completely cover the preprinted "Bulk Mail" designation in the upper right corner.

## Self-Service Mailing Information

The self-serve kiosk in the Post Office may be used when mailing multiple items such as membership packets, books, and literature. The bankcard must be used as a credit card in this instance, a method which will permit multiple purchases.

# Chapter 3: Database Overview

The database is used primarily to track memberships. In addition to the General Information tab, other active tabs on the database include

- Membership
- Donations
- Workshops
- Volunteer Activities

General information about data entry procedures and suggestions for troubleshooting are outlined below. See the document ***Bridging The Gap*** for complete instructions on creating and maintaining membership entries.

## Data Entry

✓ **Follow these guidelines to prevent duplicate entries and maintain accurate records:**

1. Complete all fields on the Membership tab as soon as a new member joins. Note that there are two separate rows for the *Name* field, so that partners who each retain their own last name can be addressed with one postcard or mailing.
2. If an existing membership is renewed, verify contact information including email address.
3. For members who wish to receive their newsletters by email, enter YES in the **email option** field.

## Troubleshooting

- Database searches may return entries containing errors, such as first and last names in one field. These entries should be corrected whenever they are located.
- To locate an existing member use <control> <F> and search by last name.
- If search is unsuccessful, try broadening the search using “any part of field”.
- Or, conduct a search using another data field such as the member’s email address or zip code.
- Ensure that the Filter icon on the Ribbon is not activated when searching member names. If the Filter is active, the search will be unsuccessful because of filtering restrictions.

## Limitations

The database is limited in some respects. For example, a member may ask to receive both print and email copies of the newsletter. However, they must choose one option or the other, but not both.

# Chapter 4: Donations and Acknowledgements

## Guidelines for acknowledging donations

When a fundraising campaign is underway, it is important to keep track of incoming donations.

- If a pre-printed donor card does not accompany the donation, write the donor's name, return address and the amount of the donation on a blank donor card.
- For all donations and gifts, stamp the date received on the top right side of the card.

✓ **Follow these guidelines for all donations of $250 or more:**

1. Prepare a formal thank-you letter printed on heavy bond stationary, using the "Donor Thank-You" letter template in the Fundraising Campaigns file, and using "save as" to preserve the template.
2. Include the donor's name and address in the heading of thank-you letters. Ensure that the letter also contains the 501(C)(3) paragraph below the closing, which states that donations are fully tax-deductible.
3. Save a copy of the letter in the designated folder within the fundraising campaign file.
4. Prepare the letter, stamp and address the envelope, and place the letter in the Executive Director's file to be signed.
5. Mail thank-you letters as soon as possible, preferably within three days of receiving the donation.
6. Note that members who renew their memberships at a high level, like Tree Defender ($500), also receive thank-you letters from the Executive Director.

## Anonymous Donors

- The organization maintains a short list of donors and grantors who request that their gift or grant will never be acknowledged publicly.
- Before publishing a list of donors in the newsletter, always check the "List of Anonymous Donors" (located in the Anonymous Donors folder) to ensure these names are not included.
- It is both necessary and appropriate to write a thank-you letter to these donors.
- See "NOTES" in the database regarding additional guidelines or requests from these donors.

## Tax Receipts

- For members who request a receipt acknowledging donation of goods or services, note the method of payment along with the check number, the amount, and the date the goods or services were received.
- For donations received at the turn of the year, note whether the check, credit card payment, PayPal payment or donation was dated for the previous year or the new year. The donor can then utilize the tax deduction for the appropriate year.

# Chapter 5: Event Reminders

## Bi-monthly general meeting reminder cards

The organization contracts with AAA Printing and Mailing Services to print, address, and mail reminder cards for events such as the bimonthly general meeting and the annual holiday party.

✓ **Follow these steps to ensure that mailings go out in a timely manner:**

1. At least two weeks before the meeting or event, extract the list of current members in the Puget Sound area from the database using a query. The list should include members' names and their mailing addresses.
2. Convert the query into a table.
3. Place a phone call to notify AAA Print and Mail Service when the file will be sent, and ask for confirmation when the file is received.
4. Export the table as an Excel file to the print and mail service.
5. Accompany the mailing list file with a second file containing a card formatted with information about the date, time, and location of the meeting; the speaker and topic; and a mention of the potluck that occurs at meetings.
6. Send mailing data for bimonthly general meetings to the service approximately twelve days before the meeting date. Prepared cards are mailed by the mailing service ten days prior to the meeting.

## Constant Contact Reminders

The AA/DBM routinely sends out these digital reminders, which are generated using templates found on the Constant Contact website.

Constant Contact email notices are used to announce the following events:

- Bimonthly general meetings
- Master Pruner classes and workshops
- Horticultural Bingo , the annual Holiday Party, and other fundraising or social events
- Media Advisories and Take Action notices

✓ **Use this checklist when creating a Constant Contact notice*:***

1. See *List of Passwords and Account Numbers* for current Constant Contact password. This list is located in a folder stored in Administrative Files > Digital Media
2. Log in to the Constant Contact site and review the organization's archived notices for style and formatting examples
3. Create a notification for the meeting or event
4. Verify correct dates, times, speaker names and other important information before sending
5. Extract a list of intended recipients from the organization's database
6. Attach the recipient list to the Constant Contact notification email
7. Send the notification immediately, or save and schedule it for timed delivery at a later date

# Chapter 6: Event Registration

## Classes

Monthly Master Pruner classes are held in the same location each time and do not require advance registration. Leave a voicemail recording beginning on the Thursday before the class is held, indicating that no registration is required for the class.

## Workshops

These events do require advance sign-ups, although people are often allowed to register on the day of the event *if space allows***.** However, if the workshop is full, preference is given to pre-registered attendees.

## Cancellations

If a pre-registered attendee is unable to come to the workshop because of illness or some other unavoidable circumstance, offer these options:

- Apply their payment as *credit* so they can take the same workshop when it is offered again in the future.
- Take a different workshop of equal value in the future

✓ **Follow this procedure for individuals who cancel their attendance at a workshop and request a refund:**

1. Put a copy of the registration in the Bookkeeper's folder with the refund request along with a stamped envelope for the check, addressed to the refund recipient.
2. Remove the registrant's name from workshop lists and rosters, and maintain details of the refund.
3. Record cancellations by placing **cancelled and refunded** registrations into a document marked "Workshop Cancellations/Refunds".
4. Store this document in the folder corresponding to the appropriate workshop.

## Other Event Registrations

The AA/DBM also handles registrations and reservations for various events such as Horticultural Bingo, Celebrity Gardener Auction, Tours, and others as needed.

# Chapter 7: Event Procedures

### Packing Lists and Preparation

Packing for Master Pruner classes, workshops, and events such as the Flower and Garden Show can be done using lists of supplies which have previously been developed. These lists are located in Administrative Files > Events > Box Lists > (specific class).

Refer to Figure 1 at the end of this chapter to determine quantities of literature to pack.

✓ **Use this checklist in preparing for an event:**

1. Call or email the person teaching or organizing the event several days beforehand to verify that the list is complete.
2. Pack at least two days before an event, allowing extra time to procure any needed items.
3. Include sign-in sheets and nametags for volunteers and event participants. These items are provided by the Volunteer Coordinator.
4. Systematically check items off the list as they are packed.
5. After the event, update any packing lists as needed.

### Completion

Confirm that items have all necessary components. For example, canopies should include the frame, cover, and weights for legs. Likewise, pop-up display backboards may consist of a frame stored in one box and an exterior covering stored in another box.

### Staging

Group the prepared boxes in the middle of the Events Room with a copy of the checklist on top. Include a reminder note regarding any items not specifically included in the prepared boxes; for example, "Take 3 display boards from basement storage."

### Transport

When events will be held outdoors, or when transport to a site will occur via a truck with an open bed instead of a car or van, use plastic storage boxes instead of cardboard boxes. Keeping literature boxes dry is essential. Cover and secure all loads carried in pickup beds for safety and compliance with the law.

### Change

Typically $50 in change is sufficient, but $100 or more may be needed for events spanning multiple days, such as the Flower and Garden Show. Place change in the bottom of a cash box, and record the change amount prior to the event so that gross sales can be tracked.

## Post-Event Procedures

✓ **Follow this checklist when materials are returned after an event:**

1. Retrieve and count the proceeds and then subtract the amount of money included for change
2. Record all relevant information for the Bookkeeper. This includes:
   - Fees paid for classes or workshops and method of payment
   - Information about any new members and membership level
   - Sales of books, literature, and other merchandise
   - Donations
3. Return any special items that were taken to the event to their normal storage location
4. Make a note of any literature or items to restock
5. Add new memberships to the database and send member packets
6. Acknowledge donations

## Event Room Layout

Supplies for classes, workshops, parties, and other events are stored in the Event Room. Figure 1 below shows the room layout with locations of supplies noted.

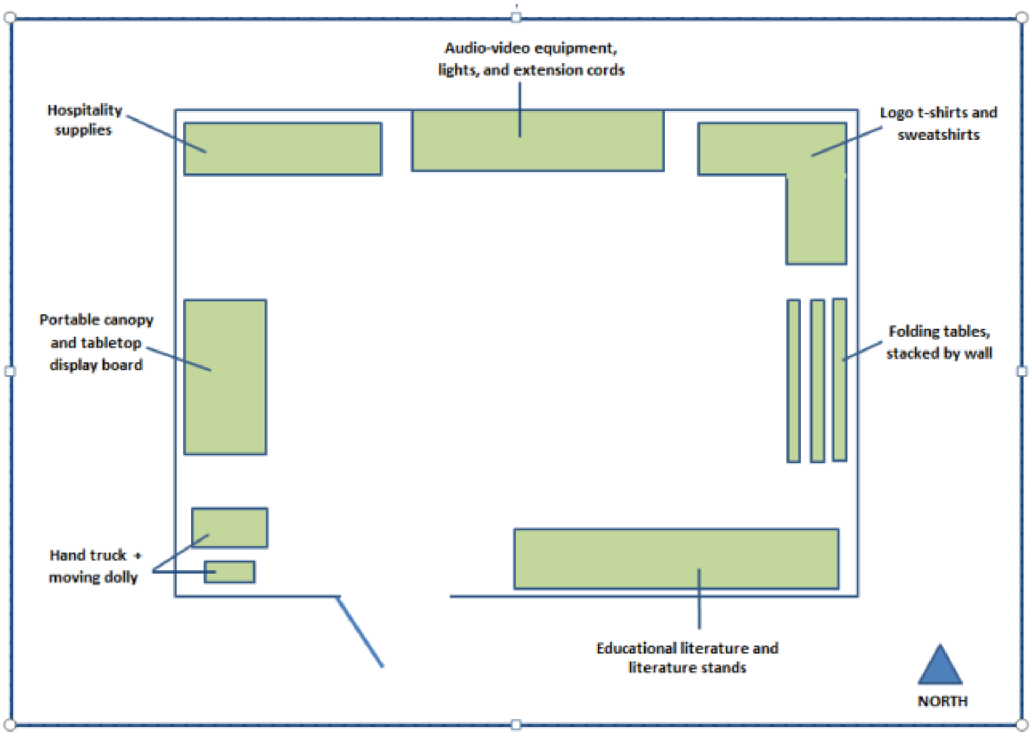


**Figure 1. Event Room Layout**

| LITERATURE TITLE | LITERATURE QUANTITIES BY EVENT | | |
|---|---|---|---|
| | Sky Nursery Prune-A-Thon | NW Flower & Garden Show | One-Day Booths |
| | | | |
| **NW Pruning Guide** | 150 | 1500 | 300 |
| **Fruit Tree Pruning** | 150 | 500 | 100 |
| **Basic Pruning Cuts** | 100 | 250 | 50 |
| **Tree Biology Pop Quiz** | 50 | 150 | 50 |
| **Pruning Japanese Maples** | 100 | 500 | 100 |
| **Saving Trees and Saving Views** | 50 | 500 | 50 |
| **How to Prune Hybrid Tea Roses** | 100 | 1000 | 50 |
| **Cass Turnbull's Guide to Pruning** | 50 | 75 | 25 |
| **Renovating an Overgrown Rhodie** | 50 | 500 | 25 |
| **Five Reasons to Stop Topping Trees** | 50 | 250 | 25 |
| **Renovating an Overgrown Planting** | 50 | 150 | 25 |
| | | | |

**Table 1. Literature Quantities by Event**

# Chapter 8: Mail orders for literature and merchandise

Merchandise orders normally come through PayPal. Mailing envelopes and materials are stored with other office supplies on the shelves against the east wall of the main office.

## Books, DVDs, Bumper Stickers, and T-Shirts

- Mail books using a 9½” x 12” Express Mail envelope and the self-service postal kiosk. Address the envelope first, and then slip in a copy of the PayPal receipt before sealing the package.
- Mail DVDs in a padded CD envelope.
- Tape bumper stickers to a sheet of cardboard to prevent bending or damage, and mail in a large manila envelope.
- Mail T-shirts in either a cardboard or padded mailing envelope.

## Literature and Literature Packets

- Mail literature, if less than 25 sheets, in a manila envelope or a postal service Priority Mail envelope.
- For larger literature orders, use a Priority Mail rigid cardboard box and bind the stack of literature with large rubber bands to prevent wrinkling during mail transit.
- Mail literature packets in padded envelopes or rigid cardboard boxes, depending on the quantity.

## Literature, Books and Items Mailed to Lecture Destinations

Include a packing list of all requested materials. Count and check off items to verify that the requested quantities have been included. Insure the package if it contains books or if the value exceeds $25.

*This manual was last updated on January 28, 2014*