The background of the slide features a light blue gradient. In the center, there is a semi-transparent image of a globe showing the Americas. Overlaid on the globe are several light blue silhouettes of people of various ages and ethnicities, holding hands in a circle, symbolizing global unity and community.

Operation Manual: A Resource For Students and Professionals



Perfecting the Act of Giving Back

AASuccess, a 501(c)(3) nonprofit organization, seeks to help students enhance their individual approaches to academic work, career development, and other life challenges.

Through our Life Skills Academy, AASuccess empowers students to identify and cultivate skills necessary for professional development and civic work. With help from our business support community, AASuccess provides students with funding, internship opportunities, coaching, and other critical resources to develop and accomplish our student- and community-focused mission.

Our overall goal at AASuccess is to help students succeed in life. We accomplish this by addressing a host of issues, including: self-discipline, stress management, accountability, citizenship, self-esteem, leadership skills, physical and emotional health, and prudent decision-making.

Our vision is to create an environment where professionals and students will learn from one another and exchange resources. We hope to develop an extensive network through team collaborations, partnerships, and collaborative work. All participants in AASuccess are required to serve the community pursuant to AASuccess' mission and to support the organization in various capacities. In doing so, the participants directly learn valuable professional life skills, mentoring and coaching skills while supporting the organization that will support them. Everyone involved in AASuccess operates and succeeds pursuant to the circle of giving of one's self to a "community effort" and in return being helped themselves by the AASuccess community.

This manual will help you make the most of opportunities within AASuccess, our apprenticeship programs, and our civic projects. It details many of the policies and procedures that AASuccess observes in achieving our mission.

803 West Broad Street, Suite 620
Falls Church, Virginia 22046
Website: www.AASuccess.org

From The Founder & Executive Coach

My friends, we have come far!

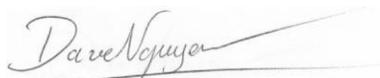
In the past year, we have begun to develop and implement Life Skills Academy's (LSA) extensive curriculum, revitalized the Sustaining Members Program (SMP), improved the coach selection process, and updated the policies and procedures that are found in only the best-run corporations. Our financial management system has been enhanced to include professional budgeting and accounting methodologies – all to maintain and support AASuccess' day-to-day operations. These evolutions are the key to being able not only to operate in the present, but also to plan for a marvelous and productive future.

Our invested students and the AASuccess Business Support Community (BSC), including an inter-generational community of elders, business owners, and committed career professionals continue to constitute the bedrock for our technical skills and life skills work. Due to the broad network of our BSC Partners and coaches that we are building, I am more convinced than ever in the power of our team and the organization as a whole to help our students to succeed.

The path to becoming actively successful in career, family, and civic duties is often winding and difficult, especially for high school students and recent graduates. Finding the balance between test scores, family and friends, life directions, studies and work is challenging. As well, the students are encouraged to embrace their roots, be culturally aware, and be sensitive to others' backgrounds and customs. Our community can help provide students with the life skills necessary to define their personal goals and enable them to lead successful professional and civic lives.

It has become apparent that the more initiatives we undertake, the more AASuccess will morph into a community's lifeline to represent authenticity, excellence, respect and honesty. These are the values that we need to instill within our students.

As I close this letter and we begin a new chapter in the life of our humble organization, I would like to sincerely thank everyone who has contributed to making the dream of AASuccess, from seven years ago, into a reality, today.



Dave Nguyen

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Chapter 1:

How Did We Get Here?

In this chapter:

- ✓ Mission Statement
- ✓ Organizational Statement
- ✓ Structure
 - Executive Committee
 - Board of Directors
 - Operations & Program Management by Students
 - AASuccess Trainees (Student Members)
 - Professional Volunteers
 - Life Skills Coaches
 - Skills Coaches
 - Non-Professional Volunteers
 - Business Partners

Our Vision

- ★ To develop, educate and mentor our students through their involvement with community-based programs that foster ethical, intellectual and social development.
- ★ To create a self-sustainable learning environment between professional mentors, coaches and students based on mutual trust and respect.
- ★ To empower our students to become future leaders, responsible citizens, and agents for positive change.

Mission Statement

To foster ethical and humanitarian values in our students while empowering them to achieve personal, academic, professional, cultural and civic fulfillment.

Organizational Statement

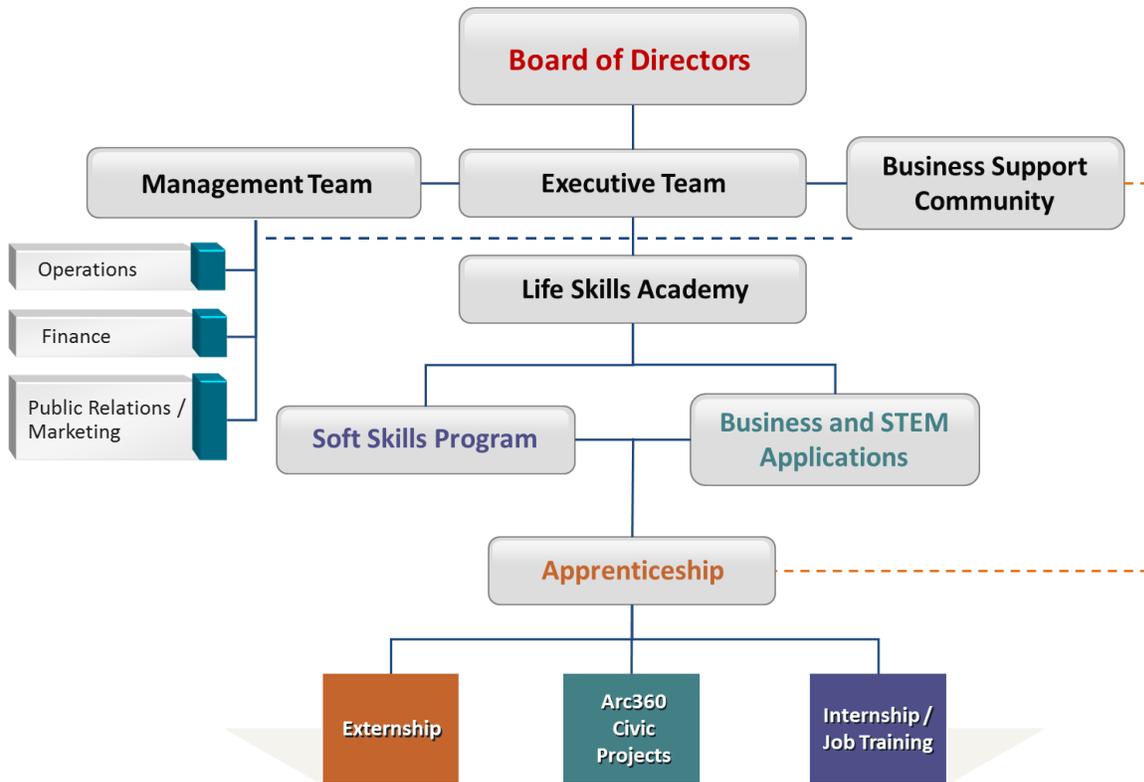
Founded in April 2006 by Dave Nguyen, Irina Nguyen, David Montanari, Sumesh Kaushal, and Malou Gemeniano, AASuccess' programs initially focused only on volunteer activities in the local community and an annual scholarship program. In 2009, the scope of our core programs grew to include life skills development, as well as internship and externship opportunities. AASuccess expanded its commitment to provide lifelong leadership development opportunities to empower student members to maximize their potential. In 2012, the Giving Back and Arc360 programs were combined to create Arc360 Civic Projects (see Chapter 6). Since 2012, AASuccess has committed in implementing its first 5-year plan to establish a magnet resource center served primarily as a life skills academy and job training center for both high school and college students. AASuccess' strategies revolve primarily around its students as a major stakeholder supported by an intergenerational support community comprised of senior citizens, business owners, career professionals, young working professionals, state and local officials, non-profit organizations, school officials and universities.

AASuccess is open to all residents of Northern Virginia interested in either receiving the benefits or volunteering in any of its two main programs: Life Skills Academy and Arc360 Civic Projects Programs. AASuccess is driven by two concepts:

- Life Skills Knowledge is socially acquired.
- Applying life skills knowledge is a lifelong process and an essential component for both career advancement and active citizenship.

Structure

AASuccess is organized as a hybrid between classical and functional management structures, designed to encourage transparent communication and idea-sharing. Life Skills Academy students and volunteers work actively across all programs. AASuccess nurtures and advances life skills amongst its participants, which includes high school and college students, primarily of Asian descent.



- **Note:** “Members” in this manual refer to all non-student volunteers, and Students affiliated with AASuccess, unless specifically identified. “Volunteers” refer to professional and non-professional volunteers, including Life Skills Coaches, Skills mentors, Students’ Parents and Business Partners, unless specifically identified.

Board of Directors:

Our Board of Directors is a distinguished group of volunteer civic-minded business leaders and career professionals, each having the capacity to provide financial support and to make strategic decisions in leading, executing, and advancing the organization’s mission. A Business Support Community, consisting of established business owners and seasoned professional volunteers, supports the Board by partnering with the Executive Team to provide critical resources.

Executive Team:

The Executive Committee includes the Executive Director serving also as a senior Life Skills Coach, at least one board member, and senior (>=3 years enrolled in the life skills academy) life skills academy students. Together, the Executive Committee reviews program progress and recommends changes. The Executive Team includes AASuccess alumni who have elected to return to the organization to continue their leadership and professional development. More importantly, these alumni are now dedicated volunteer coaches mentoring younger students – demonstrating the AASuccess culture of giving back.

The Executive Team provides leadership to the Board of Directors (the Board) and acts on issues discussed at meetings with the full Board. The Executive Team is responsible for researching and recommending a course of action on each issue that affects the Board. The Executive Committee may meet before each Board meeting to review the agenda and prepare recommendations on which the full Board will vote.

Management Team

The Management Team includes both Executive Team members, Life Skills Academy (LSA) students, and non-student volunteer staffs. The Management team leads and provides LSA students with practical knowledge and experiences. The students are empowered to cultivate the hard and soft skills necessary for professional development and implementing civic work. With the help from our volunteer mentors and Business Support Community (BSC) Partners, AASuccess provides students with funding incentives, internship opportunities, as well as other critical resources to visualize and accomplish their career goals, practice exemplary business conduct and ethics, and prepare well for their civic duties.

AASuccess Life Skills Academy provides a framework for student-development, utilizing a blended-learning model that combines face-to-face teaching with engaging online content and hands-on learning activities. This model helps students prepare for industry-standard certifications, entry-level and advanced careers, and higher education in various fields. Life Skills Academy delivers courses through a network of volunteer professionals and businesses.

AASuccess strives to guide qualified students from the beginning of their high school career until graduation. Many students continue on with the program during their college years, focusing on career development training. AASuccess recognizes, however, that students may enter the program at various points in their young adulthood.

Professional Volunteers:

Professional Volunteers represent a “lifeline” for AASuccess. They serve AASuccess as Life Coaches and consultants, and some also serve on the Board. Professional volunteers offer expert advice based on their professional expertise and life experience. All professional volunteers who have direct long-term interaction with AASuccess student members must undergo a background check to ensure the student members’ safety and well-being. Life Coaches or Skills Mentors, in particular, are carefully screened before they are matched with a student member.

Life Skills Coaches:

Life Coaches are volunteer professionals that serve as mentors for AASuccess student members. The role of Life Coaches, however, goes beyond mentorship. A Life Coach’s responsibilities include:

- Address student members’ emotional well-being
- Guide program activities

- Coordinate student opportunities
- Share professional skill-sets

Finding suitable professional volunteers may be difficult because of the time commitment required for the Life Skills Coach to serve effectively.

Skills Mentors:

Professional volunteers with limited time commitments should consider becoming a Skills mentor, who serves to provide either technical or non-technical skills. A Skills mentor shares his or her professional skill-sets to assist our Life Skills Academy students on various projects.

Non-Professional Volunteers:

AASuccess often benefits from the assistance of non-professional volunteers and organizes activities and community events. In such circumstances, non-professional volunteers are not required to go through an extensive background investigation.

Business Support Community:

Professional volunteers with businesses often offer hands-on business training opportunities to AASuccess student members. These opportunities range from individual to corporate business contexts, and may include:

- Business skills training
- Soft skills Training
- Work-readiness skills
- Paid and non-paid internships
- Financial sponsorships
- In-kind services
- Mentoring services

For the students' safety, AASuccess conducts background checks on business partners in the case of one-on-one interactions with students.

Operations & Program Management:

AASuccess operations and program provide students with hands-on learning experiences. In fact, many of our programs are managed by student members. After a rigorous screening and selection process, qualified student members may be assigned the following roles and responsibilities:

- Executive Team Trainees
- Life Skills Academy Managers
- Civic Project Managers and Associates
- Program / Project Coordinators

- Finance Manager & Finance Associates
- Marketing and Branding Manager, Associates, and Ambassadors
- Social Media Managers and Associates
- Information Technology Managers and Associates

Executive Team:

- Coordinates all program and business operations performed by student members
- Communicates biweekly with the Executive Committee and Board regarding program operations
- Follows up on new business contacts
- Maintains working relationships with professional volunteers and businesses, as well as other student members

Management Team:

- Assists the executive team with daily internal business operations (e.g., financial updates, marketing and PR tasks, and IT issues)
- Maintains working relationships and communication with student members and reports their concerns to the President
- Maintains organization's financial records on QuickBooks
- Makes timely payments
- Issues reimbursement checks and payroll when applicable
- Works with board members and Executive Coach on budget, strategic planning, and tax filing matters
- Executes the recruitment plan
- Posts timely press releases, announcements, and E-News
- Serves as the "face" of AASuccess
- Minimizes web and email disruptions
- Maintains web design, content, and quality
- Maintains anti-virus software updates and other infrastructure
- Maintains electronic recordation and creates a weekly back-up file that can be deleted after 2 weeks
- Issues warnings for abuse or misuse of electronic information, email, or IT-related resources

Program /Project Coordinators:

- Oversees program / project operations, including record keeping, financial expense management, program / project attendance, outreach activities, program / project activities report, etc.
- Evaluates program / project effectiveness and discuss suggestions and improvements with the President and Team
- Participates in strategic planning sessions ran by the executive team

Chapter 2: General Policies and Procedures

In this chapter:

- ✓ Equal Employment Opportunity
- ✓ Occupational Safety & Health Administration
- ✓ Professional Boundaries
- ✓ Confidentiality
- ✓ Background Checks
- ✓ Nepotism
- ✓ Conflicts of Interest
- ✓ Dress Code
- ✓ Anti-Substance Abuse
- ✓ Anti-Harassment (including anti-sexual harassment)
- ✓ Gross & Serious Misconduct
- ✓ Complaints & Grievances
- ✓ Disciplinary Action
- ✓ Mediation
- ✓ Termination (including return of personal & intellectual property)
- ✓ Security & Monitoring
- ✓ Email Etiquette & Privacy Protection

Equal Opportunity Employment

Policy: AASuccess is an Equal Employment Opportunity organization. Individuals working and/or volunteering with AASuccess will not be discriminated against based on their race, color, religion, sex (including pregnancy), national origin, age, disability or genetic information, as described by the U.S. Equal Employment Opportunity Commission.

Procedure: If you feel that you have been discriminated against, follow the Grievance policy and procedure described later in this chapter.

Occupational Safety & Health Administration

Policy: Your safety comes first! As described in the OSHA Act of 1970, you have the right to a safe workplace. Workers are entitled to working conditions that do not pose a risk of serious harm. To help ensure a safe and healthful workplace, OSHA also provides workers the rights to:

- Ask OSHA to inspect their workplace
- Exercise their legal rights without retaliation or discrimination
- Receive information and training about hazards, methods to prevent harm, and the OSHA standards that apply to their workplace (in a language that they understand)
- Obtain copies of test results concerning hazards in the workplace
- Review records of work-related injuries and illnesses
- Obtain copies of their medical records

For more information about your worker's rights, visit: <http://www.osha.gov/workers.html>.

AASuccess is committed to providing a safe working environment for members and volunteers, especially student members under the age of 18. All persons responsible for the work activities of other student members and volunteers are accountable for:

- Identifying practices and conditions that could injure employees, clients, members of the public or the environment
- Controlling or removing safety hazards and reporting them to a supervisor if they cannot be controlled or removed.

AASuccess demands of all employees, regardless of their position, a positive, proactive attitude and performance concerning the protection of health, safety, and the environment.

Procedure: To provide a safe working environment, AASuccess will:

- Develop and maintain safe working systems and environment;
- Provide information and training for members and volunteers;
- Assess risks before work starts on new areas of operation (e.g., buying new equipment and setting up new work methods) and regularly review those risks;
- Remove unacceptable risks to safety; and
- Provide students and contractors with adequate facilities (e.g., clean toilets, cool and clean drinking water, and hygienic eating areas)

Ultimately, everyone at the workplace is responsible for ensuring health and safety at the workplace. If you feel that your workplace is not safe, follow the Grievance policy and procedure described later in this chapter or file a complaint to OSHA.

Professional Boundaries

Policy: AASuccess emphasizes the safety of all program participants, whether they are members or volunteers. Therefore, it is important to define the boundaries or limits that will allow for a safe and acceptable professional interaction among all program participants. It is the responsibility of adult participants to maintain appropriate boundaries in this professional relationship. This includes limiting situations where an adult volunteer be left in a room with a student alone. Having meetings in a mutual location like a restaurant or library is encouraged. This is to protect

all participants from any accusations or perception of inappropriate behavior. Excessive gift-giving to individuals is also discouraged.

Procedure: If you feel uncomfortable towards any other member or volunteer in AASuccess, you are encouraged to share this with your immediate supervisor, program manager, coach, or any other individual in the director position. Follow the Grievance policy and procedure.

Confidentiality

Policy: Two areas of confidentiality need to be observed: intellectual property and personal privacy.

Intellectual Property:

All intellectual property developed by employees during their employment with AASuccess, including discoveries or inventions made in the performance of their duties related in any way to the business of AASuccess, will remain the property of AASuccess.

AASuccess members, volunteers, paid staff, or contractors may be given access to confidential information, data, business property, keys to premises or any other business-related property / information in the performance of their duties. This must be protected and used only in the interests of AASuccess.

AASuccess students and staff members must not:

- Disclose or use any part of any confidential information outside of the performance of their duties and in the interests of AASuccess
- Authorise or be involved in the improper use or disclosure of confidential information during or after their employment without the Employer's written consent, other than as required by law.

‘Confidential information’ includes any information in any form relating to AASuccess and related bodies, clients or businesses, which are not in the public domain.

AASuccess members, volunteers, paid staff, or contractors must act in good faith towards AASuccess and must prevent (or if impractical, report) the unauthorized disclosure of any confidential information. Failure to comply with this policy may result in performance improvement proceedings including dismissal, and AASuccess may also pursue monetary damages or other remedies.

Personal Privacy:

Any information that an employee learns about AASuccess, or its members or donors, as a result of working for AASuccess that is not otherwise publicly available constitutes confidential information. Employees may not disclose confidential information to anyone who is not affiliated with AASuccess. The disclosure, distribution, electronic transmission or copying of AASuccess confidential information is prohibited.

Life Skills Coaches and Board of Directors should be informed about students' well-being on general terms via email, but communication should be kept on a "need to know basis."

Any members or volunteers who disclose confidential AASuccess information will be subjected to disciplinary action (including possible separation), even if he or she does not actually benefit from the disclosure of such information.

See the Privacy Protection section for additional policies and procedures in this chapter.

Procedure: All members, volunteers, paid staff and contractors must agree to and sign the Confidentiality Pledge upon receipt of this Operations Manual.

Background Checks

Policy: In the interest of AASuccess members' welfare and safety, all professional volunteers interested in becoming a Life Skills Coach must successfully complete a criminal background check and/or driving record check as a part of the application process.

Procedure: Individuals going through a background check must provide their valid Driver's License, Social Security card, and/ or legal residential status. The Human Resources coordinator (or person serving this function) will be responsible for conducting a thorough background investigation.

Nepotism

Policy: Nepotism means favoritism shown on the basis of family relationship, as in business and politics. It is important that members in AASuccess be aware of this policy and avoid situations where there is an appearance of nepotism.

Procedure: If you feel unfairly treated because of nepotism, follow the Grievance policy and procedure described later in this chapter.

Conflicts of Interest

Policy: Conflicts of interest arise when the personal, professional or business interests of an employee are potentially at odds with the best interests of AASuccess. All AASuccess members, volunteers, paid staff, and contractors are required to act in good faith towards AASuccess. AASuccess members, volunteers, paid staff, and contractors need to be aware of potential conflicts of interest that may arise and should always act in the best interest of AASuccess.

Please discuss potential conflicts of interest with your immediate supervisor or manager.

Procedure: Where conflicts of interest may arise, AASuccess members, volunteers, paid staff, and contractors must:

- Declare any potential, actual or perceived conflicts of interest that exist on becoming employed by AASuccess to management.
- Declare any potential, actual or perceived conflicts of interest that arise or are likely to arise during employment by AASuccess to management.

- Avoid being placed in a situation where there is potential, actual, or perceived conflict of interest if at all possible.

If an AASuccess member, volunteer, paid staff, and/ or contractor declares that there may be a conflict of interest, AASuccess will review the potential areas of conflict with the individual and mutually agree on practical arrangements to resolve the situation.

AASuccess members, volunteers, paid staff, and contractors must disclose any other employment that might cause a conflict of interest with AASuccess to their manager. Where there are external involvements that do not represent a conflict of interest, these must not affect performance or attendance while working at AASuccess. If such involvement does affect performance or attendance, it will be considered a conflict of interest.

AASuccess members, volunteers, paid staff, and contractors must not set up or engage in private business or undertake other employment in direct or indirect competition with AASuccess using knowledge and/or materials gained during the course of employment or interaction with AASuccess.

Engaging in other business interests during working hours will result in strong performance improvement proceeding.

Failure to declare a potential, actual, or perceived conflict of interest, or to take timely remedial action to the satisfaction of AASuccess, may result in performance improvement proceedings, including dismissal.

Dress Code

Policy: All individuals working under AASuccess are expected to exemplify a positive and professional image. Provocative or revealing clothing is discouraged.

Procedure: If it is felt that someone's attire is inappropriate, an individual may privately inform that individual or follow the grievance policy and procedure and request that his or her Life Skills Coach address the issue.

Anti-Substance Abuse

Policy: All individuals working under AASuccess are expected to exemplify a positive and professional image. AASuccess discourages the use of tobacco products, illegal drugs, and alcohol abuse, especially in the presence of students under the age of 21. On occasion, students might be in the presence of social gatherings where alcohol is being served. AASuccess requests that adults over the age of 21 be mindful of their actions while consuming alcohol in the presence of those under the age of 21.

Procedure: If substance abuse is witnessed regarding an individual working under AASuccess, an AASuccess authority figure should be immediately informed.

Anti-Harassment

Policy: AASuccess is committed to providing a workplace free from discrimination and any type of harassment, including sexual harassment and bullying. Behavior that constitutes discrimination and/ or harassment will not be tolerated and will lead to disciplinary action taken, which may include dismissal.

For the purposes of this policy, the following definitions apply:

Direct discrimination occurs when someone is treated unfairly and is disadvantaged because of a personal characteristic that is protected under Federal or Virginia law, such as the Equal Employment Opportunity Act.

Indirect Discrimination occurs when a rule or policy seems neutral but has a discriminatory impact. For example a minimum height requirement for a particular job might be applied equally to men and women but would indirectly discriminate on the basis of sex, as women tend to be shorter than men.

Note: Nepotism can also be considered an act of discrimination.

Sexual harassment includes unwelcome conduct of a sexual nature toward a person who reasonably could have been expected to feel offended, humiliated or intimidated by the conduct.

Workplace harassment and/or bullying may include behaviours directed toward an employee or group of employees that creates a risk to health and safety (e.g. physical and/or verbal abuse, excluding or isolating individuals; or giving impossible tasks).

Cyber-bullying is defined as using information and communication technologies, such as cell phone text messages and pictures and Internet e-mail, social networking websites, defamatory personal websites, and defamatory online personal polling Web sites, to support deliberate, hostile, behavior intended to harm others.

Procedure: Members and volunteers must follow the grievance procedure and report any behavior that may constitute discrimination or harassment. The individual will not be victimized or treated unfairly for raising an issue or making a complaint. Retaliation will not be tolerated by AASuccess.

Gross & Serious Misconduct

Policy: Under some circumstances, gross or serious misconduct may result in instant dismissal from AASuccess, but management must first consult the Board. Gross and serious misconduct may include, but is not limited to larceny, physical abuse or assault, harassment / bullying, etc.

Procedure:

- The Executive Coach will thoroughly investigate the alleged offence, including questioning any witnesses.
- The Executive Coach should ask the student or staff member for his or her response to the allegation (taking notes of this discussion) and allow them to have appropriate

representation. The Executive Coach should also have a witness present. The manager shall give genuine consideration to the student's or staff member's response and circumstances.

- If still appropriate, following a thorough investigation, the Executive Coach will discuss the situation with the Board before he or she can terminate / dismiss the student or staff member.
- The Executive Coach should keep a file of all evidence collected and action taken in these circumstances.
- AASuccess will send the student or staff member a letter of termination noting brief details.

Complaints & Grievances

Policy: AASuccess upholds a positive and professional organization and seeks happy and satisfied members and volunteers. Should members or volunteers become dissatisfied because of perceived discrimination, harassment, or unfair treatment, they have the right to file a complaint.

Procedure: Preferably, the Executive Coach would handle student members' concerns. However, any member or volunteer of AASuccess who feels that she or he has been a victim of discrimination, harassment, or unfair treatment should immediately inform one of the following:

- An immediate supervisor or manager*
- Another supervisor or program manager*
- The individual's Life Skills Coach or the Executive Coach
- A member of the Board
- Fairfax County Office of Human Rights and Equity Programs (external)

*See Chapter 6 to identify specific supervisors or program managers.

Upon receiving a complaint, AASuccess will promptly investigate, making all reasonable efforts to maintain confidentiality. All parties mentioned during the investigation will be contacted for their observation of the incident.

The grievance procedure includes a series of meetings with various levels of management in an attempt to resolve the complaint. There are some issues that may not be disputed, such as personnel regulations, wages, salaries, and benefits. These issues are determined on a quarterly basis by the Executive Committee and the Board of Directors.

All complaints and grievances must be filed within 30 days of the incident in question.

AASuccess will take appropriate disciplinary action, up to and including separation from AASuccess, if it finds that any member or volunteer has engaged in discrimination, harassment, or unfair treatment.

Disciplinary Action

Policy: An individual may face disciplinary measures for violating policies described in this Operations Manual, insubordination, or other justifiable causes. The Executive Coach provides

ongoing coaching plans and provides performance feedback to member students, which may be different from the Disciplinary Action policy highlighted in this section.

Procedure: Depending on the violation and the severity of its effect, different types of disciplinary action may occur. Typically, disciplinary actions include:

- Oral reprimand
- Written reprimand
- Suspension
- Demotion
- Dismissal

Mediation

Policy: AASuccess prefers to resolve disputes through a mediator. Whereas arbitration, adjudication, or litigation can be costly and lead to resolutions that are favorable for only one side, mediation allows for a negotiation that guides both parties towards a mutually agreeable settlement, while preserving the professional relationship.

Procedure: If an individual has followed the grievance procedure and feels that his or her complaint has not been properly addressed, he or she may request a third-party mediator.

The selected mediator must be impartial and allow all parties to share their concerns.

The mediator must take accurate notes of the discussion by both parties and record final agreements between the parties. The meeting notes and any agreements shall be read and signed by both parties, but they do not constitute a binding contract. Both parties may agree to terminate their professional relationship after this meeting.

Termination

Policy: AASuccess students may resign at any time. AASuccess reserves the right to terminate the duties of any member or volunteer for any lawful reason either described in this manual or issued by federal or Virginia state law.

Procedure: Separated volunteers or members must return any AASuccess property. AASuccess retains personnel records for up to 5 years.

Return of Property

AASuccess members and volunteers are responsible for AASuccess equipment, property, and work products that they possess or control, including but not limited to:

- Credit cards,
- Office / building keys,
- Computers, computerized diskettes, electronic/voice mail codes, and
- Intellectual property (e.g., written materials, work product).

In the event of separation from AASuccess, or immediately upon request by the President, AASuccess members and volunteers must return all AASuccess property in their possession or control. AASuccess may also take any action deemed appropriate and necessary to recover or protect its property.

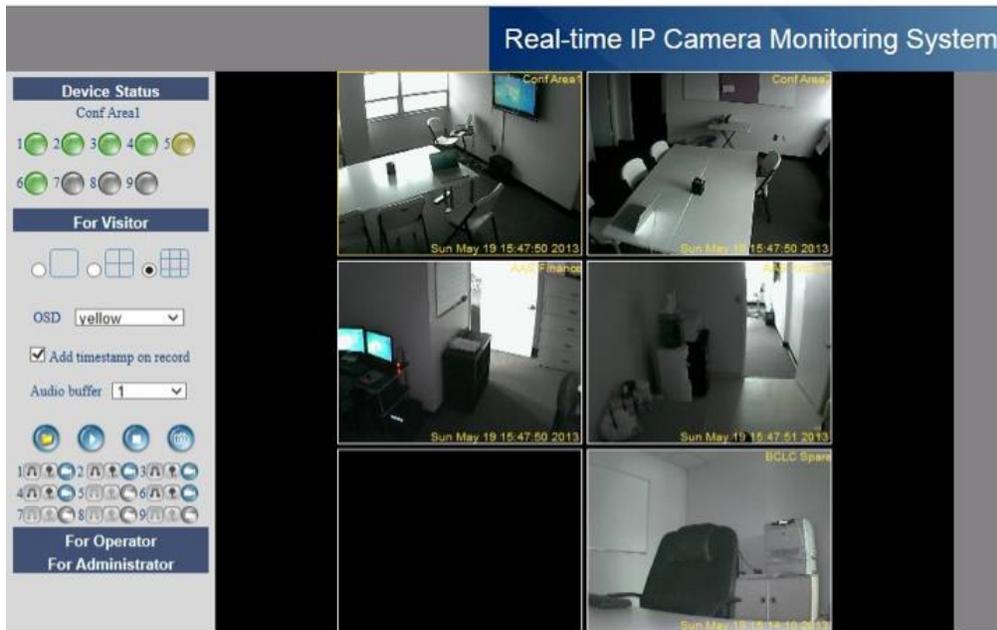
Security and Monitoring

Policy: To ensure the safety of all participants at AASuccess uses security cameras to monitor its premises. Tapes will be archived for at least 2 years.

Procedure: Follow the Complaints & Grievances procedure to report any tampering or damage to security cameras immediately.

AASuccess Office LogMeIn & SecCams:

The screenshot shows the LogMeIn dashboard interface. At the top, there is a blue header with the LogMeIn logo on the left and a user profile icon on the right containing the email address "info@asuccess.org". Below the header, a green "Special Offer" banner is visible on the left. The main content area is titled "Home" and features a red notification banner that reads "All device names revised for better identification." Below this, a list of devices is displayed, each with a status icon (green checkmark or yellow warning), a name, and a "Free - Online" status. The devices listed are: AAS Finance, AAS Network, AAS Spare1, AAS Spare2, Arc360 iMac, Arc360 MacBook, BCLC_Classroom, BCLC_Office, Dave_Nguyen, and IMain_ConfRm. To the right of the "Dave_Nguyen" device, there is a red annotation that says "Dave's laptop @ home". On the far left, there is a sidebar with navigation options like Home, Reports, Networks, My Networks, Deployment, Network Settings, and Backup. At the bottom left of the sidebar, there is a promotional offer for "100GB only \$3.99/mo." by cubby by LogMeIn.



Email Etiquette & Privacy Protection

Policy: AASuccess expects professionalism in electronic communication. Be sure to observe the confidentiality policy regarding personal and private information.

Procedure: Student members should seek to avoid informal language in their business writing, including emails. Do not write anything that would not be appropriate to share with a larger audience.

Participants in AASuccess' programs will be asked to sign a media release form that allows AASuccess to use their photos, work product, and success stories.

Chapter 3: Personnel & Working Benefits

In this chapter:

- ✓ Personnel Records
- ✓ Working Schedule / Timesheets
- ✓ Core Working Hours
- ✓ Flexible Working Arrangements
- ✓ Office Hours
- ✓ Holidays, Vacations, Sick Leave, PPT / PTO
- ✓ Health Benefits
- ✓ Professional Development Training
- ✓ Performance Review
- ✓ Performance Improvement Plan

Personnel Records

Policy: Personnel records are the property of AASuccess, and access to the information they contain is restricted and confidential.

Procedure: A personnel file shall be kept for each AASuccess student and should include:

- Student's membership and/or job application
- Copy of the letter of Life Skill Academy's letter of acceptance and position description
- Performance reviews
- Disciplinary records
- Records of stipend increases
- Other relevant personnel information

It is the responsibility of each student to promptly notify his or her Life Coach in writing of any changes in personnel data, including personal mailing addresses, telephone numbers, names of dependents, and emergency contacts.

Working Schedule / Timesheets

Policy: Each student will have different working schedules, depending on the program and the individual student member's school work load.

Accurately recording time worked is the responsibility of every AASuccess member. Tampering, altering, or falsifying time records or recording time on another student's time record may result in strict disciplinary action.

Failure to report time worked will result in a written reprimand (for all members) and delay of payment (for paid positions only) as this may affect payroll and tax filings. See Payroll and Tax Filings section in Chapter 4 for more information pertaining to paid positions.

Procedure: All AASuccess members must complete, within two days of each biweekly period, their time and attendance record for review and approval by the President. Refer to Timesheets section in Chapter 5 for Timesheet procedures.

Core Working Hours

Policy: Working hours may vary depending on each member or a volunteer's outside commitments. AASuccess expects, however, that all workers maintain a clear channel of communication, especially regarding working hours. Core working hours at AASuccess will be every Saturday, from 10 AM – 2 PM. Meetings should be coordinated between these hours.

Students must be present for at least 3 out of 4 working Saturdays each month.

Procedure: All AASuccess members must make prior arrangements with the Executive Coach and a designated authorizer if they need an alternative or flexible working schedule.

Flexible Working Schedule

Policy: AASuccess encourages academic excellence. Any student, regardless of role or job function, may request flexible working arrangements based on family and school responsibilities. Students should put all requests in writing.

Procedure: AASuccess reviews all relevant facts and circumstances before approving flexible working arrangements.

Circumstances that may be relevant to determining refusal include:

- Nature of the employee's work and parental or school responsibilities
- Nature and cost of the arrangements required for a student to fulfill their family or career responsibilities
- Effect of the flexible working arrangements on the workplace
- Consequences for AASuccess of having the flexible working arrangements
- Consequences for the student of not having the flexible working arrangements

Other factors that may be relevant in a particular case include:

- When the arrangements are to commence
- How long the arrangements will last
- Information that has been provided by the student about their situation

AASuccess will provide a written response granting or refusal of the request within three days and will only refuse such requests on reasonable business grounds. These reasons will be detailed in the written refusal.

Options for flexible work practices:

Flexible work options which may be considered by AASuccess include, but are not limited to:

- Long-term, part-time work
- Flexible working shifts
- Working from home

Members utilizing flexible work practices will be not be treated differently from other members or barred from promotion or supervisory responsibilities.

Office Hours

Policy: The AASuccess office seeks to maintain office hours that are convenient to student members working on various projects and programs. Office hours outside Core Working Hours must be coordinated with the Executive Coach and President. While it respects all working, school, and family priorities, AASuccess generally operates at times when students have reduced academic pressures (e.g., over school breaks).

Holidays, Vacations, Sick Leave, Paid Personal Time, Personal Time Off

Holidays:

The AASuccess office typically closes on three days:

- New Year's Day (January 1st)
- Thanksgiving (4th Thursday in November)
- Christmas Day (December 25th)

Vacation Notices / Request:

Vacation notices / requests must be made in writing at least 2 weeks prior to your trip so that Program Managers/Directors have adequate time to plan for activities and events.

Sick Leave and Medical Emergencies:

Members and volunteers should notify the Program Manager as soon as possible if an unexpected illness or emergency will disrupt their typical work schedule. AASuccess does not limit days of sick leave, but it does favor reliable individuals.

Paid Personal Time/ Personal Time Off:

Most AASuccess members and volunteers are unpaid. At this time, AASuccess does not offer paid personal time off. However, all members and volunteers are entitled to take personal time off. The amount of PTO that a person can have will be at the discretion of the President and agreed upon by the Executive Coach, keeping in mind, that AASuccess program operations will not be disrupted.

Procedure: In general, members and volunteers must inform their direct supervisor, program manager, and working colleagues of their intended absence in writing and at least two weeks in advance. In cases of emergency, notices should be made as soon as possible via phone, email, or text messaging.

Health Benefits

Policy: Currently, AASuccess does not offer any paid health benefits. This will be explored at a later time and updated in the Operations Manual.

Professional Development Training

See Life Skills Development Training in Chapter 6.

Performance Review

Policy: The review process aims to improve performance. It should include ongoing informal and formal reviews. We encourage a two-way process in which student members also give management feedback on performance. All AASuccess student members will undergo a formal performance review with their immediate managers at least twice each year. Life Skills Coaches will be consulted during this process.

Procedure:

- The Life Skills Coach and the student agree on the date for a performance appraisal meeting to allow time to prepare.
- The Life Skills Coach and the student will meet and openly and constructively discuss performance over the period.
- The Life Skills Coach and the student will agree upon any objectives and outcomes for the next appraisal period.
- Training and development will be considered.
- Notes should be taken of the meeting and copies kept by the Life Skills Coach.
- The Life Skills Coach will keep a copy of all Performance Reviews in the Central Repository Folder. Blank forms can also be found in the Central Repository Folder.

Outside of this formal process, students are encouraged to raise issues as they arise.

Sample: AASUCCESS PERFORMANCE REVIEW (exact format may vary)

Self-Evaluation by Student

Student's Name: Life Skills Coach's Name:	Rating Period:
--	-----------------------

Student's Name:
Anniversary Date (date student began program):

Rating Year:	
Justification and Comments:	
Quality Justification: Work Performance Element: Initiative Element:	
Contributions to AASuccess Programs:	

- Overall Rating Scale:
1. Need Improvement
 2. Good
 3. Very Good
 4. Excellent

Read the following statements and answer appropriately. You may include additional comments at the end of this form. Submit the completed form to your immediate supervisor.

1. Describe your expectations for participating in AASuccess and whether those expectations were met. Explain why or why not.

2. Describe personal areas or skills that you would like to develop over the next fiscal year.

Performance Evaluation by Life Skills Coach and Volunteer Guest Judges

Rubric Grading System:

- For each criterion, the final score ranging from 1 (lowest grade) to 5 (highest grade) must be rated.

First Judge's Name:	Second Judge's Name (if applicable):				
Student's Name:	Review Period:		Fiscal Year _201_____		
	(circle Quarter)		Q1	Q2	Q3
	Q4				
Criteria	1	2	3	4	5
<i>Mannerism and Etiquette</i>					
Attendance					
Punctuality					
Appearance					
Attitude/Appropriate Expressions perceived by AASuccess					
Judge's Overall Rating					
<i>Productivity & Quality</i>					
Completing work assignments timely and with care and completeness					
Consistently apply <i>new</i> knowledge & tools in both people and technical skills while working towards the 3-month goals					
Quality of work products/goals as stated in the 3-month plan					
Consistent & genuine effort to meet or exceed the 3-month plan goals in all listed categories					
Employ your soft skills in increase the quality of your character traits perceived by others who care about you					
Judge's Overall Rating					
<i>People Skills & Personal Growth</i>					
Interact frequently with peers, coaches, professionals in AASuccess					
Accept instructions and respond to feedback to coaches/staff or team lead timely					
Make efforts to assist and help others around you (going the extra mile)					
Adhere to 48-hour responsive time to inquiries via emails, text, or voice mails by people connected to you via AASuccess					
Creativity shown to resolve challenges or difficult issues regarding self					
Creativity shown to resolve challenges or difficult issues regarding family, school/career and AASuccess					
Praises by peers and mentors					
Demonstrate positive impacts to wellness and self-esteem of self					
Judge's Overall Rating					

Procedure:

- Students is rated based on his/her rating record and/or data collected at the end of the preceding 3-month period
- Student should be rated with the score of '3' if the student's progress stay stagnant
- The ratings prior to the assessment is based on at least three officials and approved by the Executive Coach
- Judges may override the rating score for each category by + or - 0.5 to 1 point, as evidenced by the student's presentation during the assessment
- Final rating scores rated by the judges shall be made final

Performance Improvement Plan

Policy: Where warranted, AASuccess will use improvement processes to improve performance. If an improvement process does not succeed, AASuccess may terminate a student member's work duty. Depending on the circumstances, performance improvement action may include verbal or written warnings, counseling, or retraining.

AASuccess requires a minimum standard of conduct and performance, which will be made clear to students and staff during the mid-year and annual performance review processes. If an AASuccess student member does not meet this standard, AASuccess will take appropriate corrective actions, such as training. Formal performance improvement procedures will generally only start when other corrective actions fail.

If an AASuccess student member deliberately breaches business policy or procedure, or engages in misconduct, AASuccess may immediately begin improvement procedures. In cases of serious misconduct or breach of policy, AASuccess may even dismiss a student member.

Each AASuccess student member must understand his or her responsibilities, be counseled, and given the opportunity to reach the standards expected of them. AASuccess will give an AASuccess student member the opportunity to defend himself or herself before management takes further action.

Procedure:

- AASuccess will advise the student member of any shortfall in their performance, and give him/her an opportunity to respond.
- Once the student member responds, the Life Skills Coach will consider his or her response and decide if performance improvement action should be taken; AASuccess will provide support, such as training, where decided appropriate.
- If the AASuccess student member is given a verbal warning, the Life Skills Coach should make a signed and dated note of it.
- The Life Skills Coach will advise the student in clear terms with what they see as the performance problem or the unacceptable conduct. To highlight the deficiency, they should use specific examples and cite the correct policy or procedure.
- The Life Skills Coach will allow the student member to respond before making a decision. The student member may have a support person present at such meetings.
- The Life Skills Coach will decide whether further measures are warranted.
- If a written warning is to be given, the Life Skills Coach should:
 - Document it and give the student member a copy
 - Give the student member and his or her support person the opportunity to sign the warning
 - Keep a copy on file
- The warning must:
 - Define the deficiency
 - Include a clear explanation of the expected standard
 - Indicate when the AASuccess student member needs to achieve it

- Indicate how the business, AASuccess, will help the AASuccess student or staff member achieve the improvement required
- Outline the consequences of failing to improve
- The Life Skills Coach concerned should document all meetings and training and/or coaching. Documentation should include a summary of each meeting, including the date, time, and location. Documentation should be stored in the student member's personnel file.
- The Life Skills Coach will continue to support the AASuccess student member and note the support they give, e.g. training or counselling.
- If the student member's performance or conduct does not improve, the Life Skills Coach will give the student a final written warning and follow appropriate steps as indicated above. This document must warn the student in clear terms. Unless the student exhibits sufficient and sustained improvement, AASuccess may terminate the student member's job duties via official approval from the Board.

Performance Plan and Quarterly Life Skills Assessment:

Each AASuccess student will undergo formal performance review with the AASuccess Life Skills Academy and Executive Team on a quarterly basis.

Procedure:

- The management schedules on a quarterly basis a Life Skill Assessment meeting.
- The management and the student will meet, and openly and constructively discuss performance regarding the previous three months, which will include a review of a life skills assessment portfolio filed within that reporting period.
- The manager and the student will consider training and coaching plans for the next-three month life skills plan.

Outside the formal process, the students or staffs are encouraged to raise any issues they have when they arise.

Chapter 4: Financial Policies & Procedures

In this chapter:

- ✓ Book Keeping
 - ✓ Expense Reimbursements
 - Debit Card Usage
 - ✓ Allowable Expenses
 - Program materials / supplies
 - Mileage
 - Travel
 - Meals
 - Lodging
 - ✓ Procurement
 - ✓ Income / donation processing
 - ✓ Payroll
 - ✓ Tax Filings
- **Note:** AASuccess maintains transparency in all its activities. This chapter outlines how AASuccess tracks its financial activities.

Book Keeping

Policy: AASuccess uses Quick Books to track financial activities. The Assistant Finance Coordinator must use the online banking account to file all transactions into Quick Books (Go to Quick Books SOP for technical information). Only the Financial Coordinator, the Assistant Financial Coordinator, members of the Executive Team, and the Board of Directors may access this information.

Procedure:

- Online bank account

To log on our online bank account, go to AASuccess' current designated online bank account, and enter the Username and Password.

Note: Only the Finance Team and Executive Coach should have access to our online bank account. Others must seek approval from the Executive Coach and Finance Coordinator.

- Quick Books

Quick Books is the designated financial software for AASuccess. There is one desktop in the Administrative office that has been designated for accounting purposes.

- Weekly Reports

The Assistant Finance Coordinator must email weekly reports to the President and Executive Coach each Sunday. The report includes the organization's current account balances, transaction expenses, and checks written during that weekly period.

Sample Weekly Report:

Subject

Weekly Report: July 31 – August 6

Body

As of August 4th, 2011, we have \$1,202.39 dollars in our bank account. The transaction for this week is \$1,100 for UVW and XYZ for stipend(s), \$29.10 for office supplies, and \$750 for rent.

We have written a check of \$34.23 for ABC as a reimbursement for eating and drinking utensils, plus \$93 for the college fair food for a total of \$127.23.

Sincerely,

Finance Coordinator

- Urgent Actions

Should AASuccess' account balance fall below \$1000, at least one person on the Finance team must immediately inform the President and Executive Coach. The account balance should never fall below \$300.

Expense Reimbursements

Policy: Responsibility of purchasing items on behalf of AASuccess rotates among the students. AASuccess may reimburse students for out-of-pocket expenses on **necessary** items.

Procedure:

- Email the Assistant Finance Coordinator and cc the Finance Coordinator before purchasing any items.
- Subject: Project name and project leader.
- Body: Indicate the purchaser, the items to be purchased, estimated cost, reason for purchase, and deadline for purchasing.
- Expect a reply from the Assistant Finance Coordinator within two days. Purchase the item only after receiving approval from the Finance Team.
- Contact the coordinator either by phone or by e-mail to inform him or her of the purchase, noting the urgency, if any, of the reimbursement request.
- Put the receipts into the “Receipt Box” located on the shelf in the Administrative Office. (On the back of the receipt, write the items and purchaser’s contact information.)
- Within two weeks, the reimbursement check will be available for pickup from the Outbox of the finance cabinet.

Note: AASuccess **will not** reimburse students failing to seek approval from the Finance Team before purchasing items.

Debit Card Usage:

Students who have access to AASuccess’ bank debit card must also follow the procedure outlined above.

Allowable Expenses

Policy: Reimbursement is authorized for reasonable and necessary expenses incurred while carrying out job responsibilities on behalf of AASuccess.

Program Materials / Supplies:

Occasionally, students and volunteers may be asked to purchase program materials or supplies for various program activities/events. These requests will typically be made by the President, Program Managers, and/or Directors. If members and volunteers agree to make these purchases, they must submit receipts for reimbursement.

Mileage:

Only AASuccess Life Skills Coaches may claim mileage reimbursement for transportation between the AASuccess office and their homes during normal working hours.

Travel:

AASuccess will reimburse legitimate business expenses incurred while traveling in connection with AASuccess business.

AASuccess students are responsible for transportation costs between the office and their homes during normal work hours. During weekends, only work-related trips with incurred expenses will be reimbursed in accordance with regular travel policies.

Reimbursements for transportation expenses (airfare, train, bus, etc.) must be documented by paid invoice(s) showing origination and destination information. AASuccess will also reimburse local transportation documented by paid receipt (e.g., taxis, ground shuttles, subways, and rental cars). Rental car should be returned with a full tank of fuel; save the fuel receipt for reimbursement.

Meals:

Meal reimbursements cover actual out-of-pocket expenses for all meals on a work-related trip from time of departure until return, except where meals are included in conferences or workshop fees. Expenses for alcoholic beverages will not be covered. Meal reimbursements will be paid upon submission of meal receipts, not to exceed the maximum allowance by U.S. General Services Administration meal rates. To check allowable rates, visit www.gsa.gov/perdiem. New rates will take effect January 1st of each calendar year.

Lodging:

Lodging reimbursement covers your actual out-of-pocket lodging expenses, including room tax. Without prior approval by the President, lodging charges are reimbursed only up to the maximum amounts for lodging shown on the U.S. General Services Administration website: www.gsa.gov/perdiem

AASuccess requests that students and volunteers call more than one hotel or motel to find the best possible room rate in that area. Although an establishment may not have rooms available at or below the maximum allowable rate, it may be willing to offer government, non-profit, or other discounted rates below its normal business rate. To save on travel costs, always ask for the lowest available rate for which you qualify.

Procedure: You must support each expense with paid receipts. Examples of allowable miscellaneous expenses include necessary work-related supplies, and business telephone calls.

In order to claim lodging reimbursement, you must attach the original paid receipt from the lodging facility. Other receipts, such as credit card receipts, are not acceptable.

Submit reimbursement claims within 30 days of incurred expenses. Otherwise, you waive your right to reimbursement.

Follow procedures in the previous Expense Reimbursements section.

Procurement

Policy: Currently, AASuccess does not have a procurement policy.

Procedure: Discuss all supply orders with the Executive Coach and President.

Financial Administration

Policy: The Assistant Finance Coordinator manages and performs general tasks. These include bookkeeping, office management, and communication with the Finance Team. The Finance Coordinator is responsible for overseeing weekly activities by the Finance Team and questioning

abnormal activities. The Finance Coordinator will inform the Executive Coach and President of any financial concerns.

Procedure: Follow the specific procedure for each item listed in bold and underlined.

Mail:

Students should place incoming mail into finance bin located on the finance work table. The Assistant Finance Coordinator will sort the mail. Bills are to be paid immediately by mailed checks. Follow the instruction in the bill and use the envelope placed in the bill for the check.

Rent and Internet:

AASuccess Business Support Community Partners, e.g., Business Culture & Language Centre LLC. (BCLC) and Progressive Skills LLC (PSK), have generously agreed to help donate its fund to cover costs associated with rent and internet access in the AASuccess office. The AASuccess Finance Team must pay 33% of the total each month.

Donations:

Checks: Donation checks are to be kept in one place and deposited on the 1st and 15th of each month.

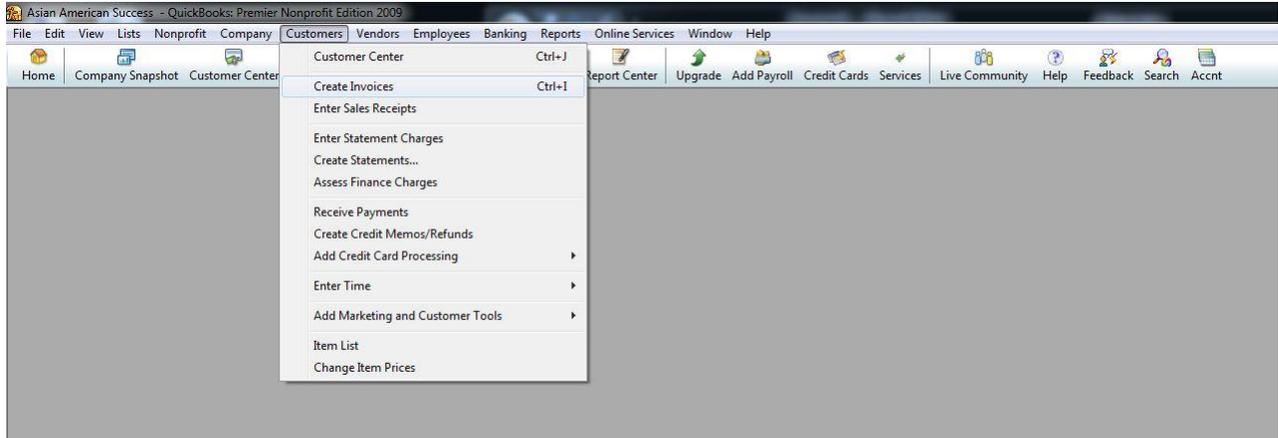
Acknowledgement Letter: Because they must serve as a receipt for tax purposes, “Thank you” letters must specifically indicate the donation amount, the date it was received, and the purpose for the donation. Acknowledgement letters should be written on the 20th of each month using the template located in the Central Repository folder. You may email the acknowledgement letter to your donor.

Invoices

Policy: The Assistant Finance Coordinator will handle invoices and keep the Finance Team updated. The Finance Coordinator must communicate with everyone in the team at least once per week.

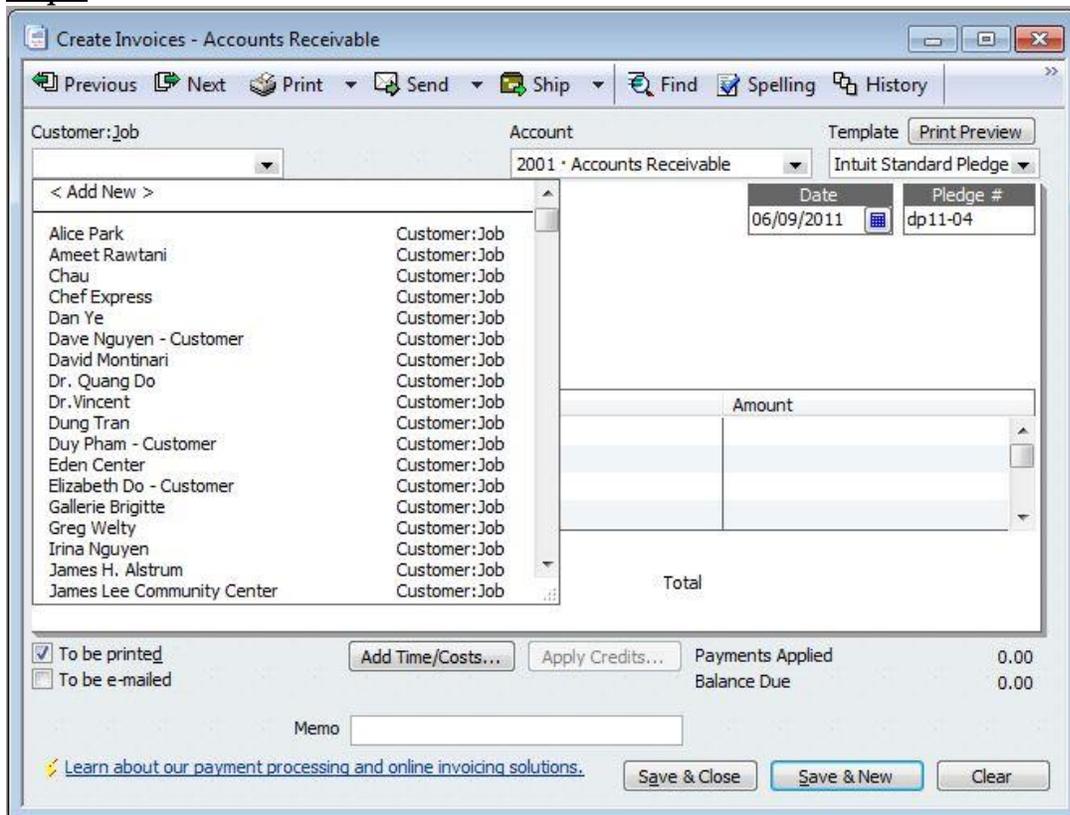
Procedure: Follow the specific procedures for handling invoices.

Step 1



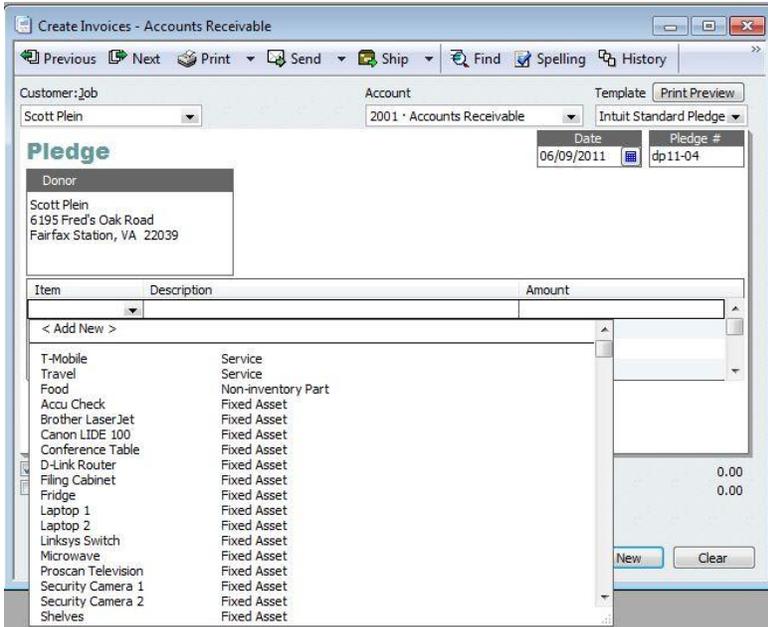
Click on Customers Tab -> Create Invoice

Step 2



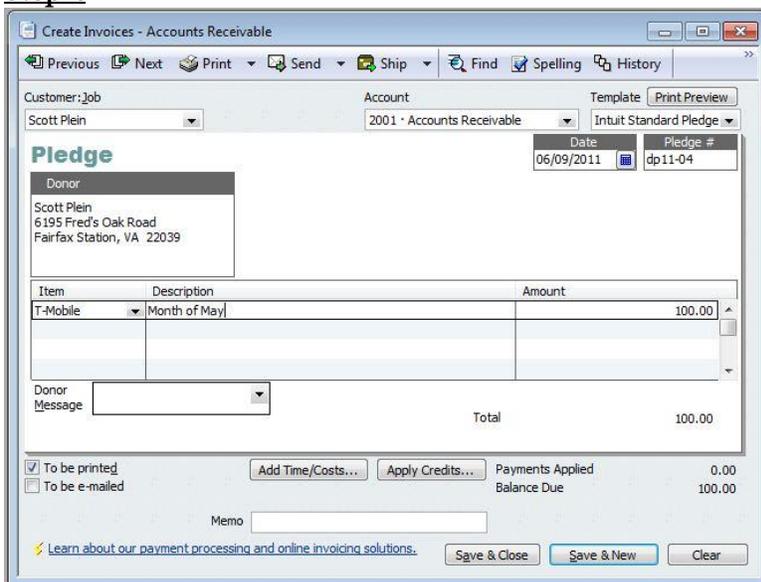
Select Customer (person who is being billed)
If new customer select <Add New >

Step 3



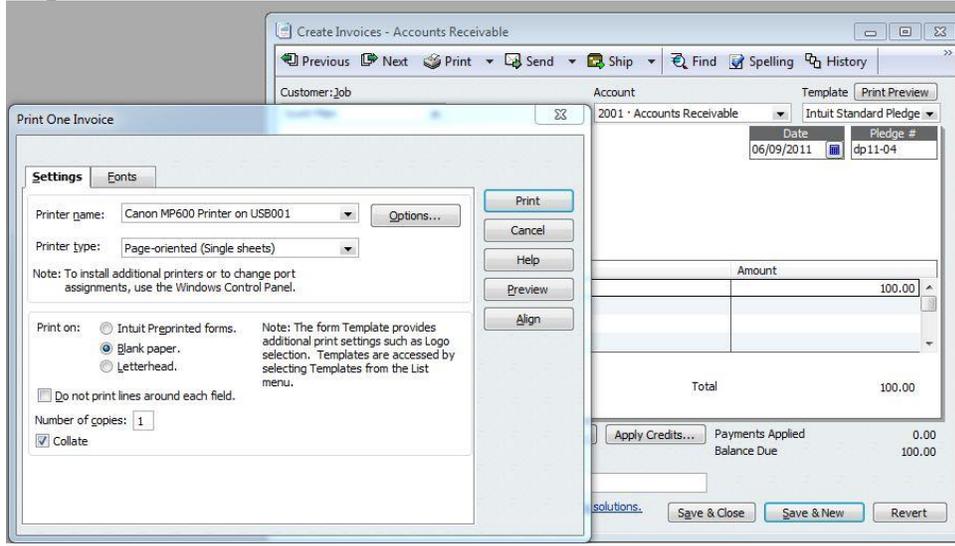
If date is not current date change date
 Pledge # automatically increments from last pledge #
 If invoice author is different change Pledge # according to model:
 NNYY-PP NN=Initials YY=Year PP=Pledge #
 Select Item
 If new item select <Add New>

Step 4



Enter Description and Amount
 Create Donor Message or select one from drop down arrow
 Write memo if any reminders are needed
 For AASuccess Custom Created Template select Intuit Standard Pledge Copy

Step 5



Click on Print Preview and verify invoice

Click Print after verification

Choose printer to print or select print to PDF to create digital copy which can be emailed or transferred

Monthly Financial Reports

Policy: Financial reports are due on the 10th of each month. The following reports must be created each month:

- Balance Sheet (YTD)
- Budget vs. Actual (Month)
- Budget vs. Actual (YTD)
- Profit & Loss (Month)
- Profit & Loss Budget Performance (YTD)

Procedure: Follow the steps provided to run each type of financial report.

Balance Sheet (YTD)

- 1) Company & Financial → Balance Sheet Standard
- 2) Fine as is

Budget vs. Actuals (Month)

- 1) Budgets & Forecasts → Budget vs. Actuals
- 2) Totals only

Budget vs. Actuals (YTD)

- 1) Budgets & Forecasts → Budget vs. Actual
- 2) Totals only

Profit & Loss (Month)

- 1) Company & Financial → Profit & Loss Standard
- 2) Includes comments on each category
- 3) Use Adobe Acrobat to add comments
- 4) Totals only

Profit & Loss Budget Performance (YTD)

- 1) Company & Financial → Profit & Loss Standard
- 2) Totals only

QuickBooks Checks

Policy: Occasionally, checks must be generated to pay bills or issue reimbursements. QuickBooks can be used to generate checks for payment.

Procedure: Get approval from the Executive Coach and President for access to QuickBooks. The Financial Coordinator will train approved team members on the specific procedures.

Note: A copy of the check must be saved or scanned.

QuickBooks Deposits

Policy: Keep track of deposits using QuickBooks.

Procedure: Follow the steps provided to record deposits.

Step 1



Click on “Banking” → “Make Deposits”.

Step 2

- Click on “Received From” and select person if not available select <add new>.
- Click on “Account” select income account that corresponds to the funds being given.
- Click on “No.” type in check number.
- Click on “Pmt Meth” select cash, check, or PayPal.
- Click on “Amount” enter amount of money for that item.
- Repeat for each item that was included in the deposit.

Payroll

Policy: Individuals with paid positions are required to provide daily record keeping for the hours that are worked.

Procedure: Fill out timesheets online within two days of the end of each biweekly period. The Executive Coach will review and approve time and attendance records.

Checks will be issued on a consistent basis as determined by the Executive Coach with the consultation of a designated AASuccess’ CPA. Student stipends are paid every other month.

Tax Preparation & Filing

Policy: Payroll records along with income and expenses recorded in QuickBooks will be used for annual tax filings.

Procedure: The Financial Coordinator is responsible for gathering pertinent income and expense information for the Treasurer and the Board to review.

After the Treasurer and Financial Coordinator review financial information, AASuccess’ designated CPA accountant will be contacted to begin the tax filing process.

Sample:

Internal Financial Report

For the fiscal year of 2013-2014



Generated by Thao Bui

Financial Overview

For the fiscal year of 2013-2014, we generated a profit of \$5,748.81, which is 12.3% lower than the profit of the previous fiscal year (AASuccess Income Statement, page 1). The lower of net income this year is because of the non-total-correlation between our income and expense.

There is a decreasing trend of individual contributions according to the Donor Contribution Chart on page 2. However, the total fund, including the general fund and all core programs within the scope of AASuccess, has reached \$71,219.35, and is equivalent to an increase of 25.65% than the previous year.

According to AASuccess Income Statement on page 1, in the fiscal year of 2013-2014, the total expenditure of AASuccess is \$65,470.54. This includes general expenses (i.e. advertising expense, operational expense, and rent), Sustaining Member Fundraising and Giving Back expenses, and the expenses of the three annual programs of AASuccess (Arc360 Civic, Scholarship, and Life-skills Academy). As shown in the Expense Components Graph on page 2, general expenses comprise up to 63% of the total expense by the organization.

Unrestricted net assets account, which reflects the retained earnings of our non-profit organization, has increased by up to 204% from the previous fiscal year, from \$3,220.12 to \$9,775.67. There is a huge change because the net income last year added up to it. The increase in unrestricted net assets account promises the capability of AASuccess to cover its expenses in the near future to meet its fast-paced growth in scale.

In line with the Net Income & Expense by Year Graph on page 2, the upward sloping of both the net income and expense lines shows the solid development of AASuccess as a non-profit organization for the last three fiscal years.

Period	Sep '11 - Aug 12	Sep '12 - Aug 13	Sep '13 - Aug 14
Income			
General Fund			
Organization Contributions	\$ -	\$ 5,200.00	\$ 14,400.00
General Fund Raising	\$ 18,075.00	\$ 15,550.00	\$ 30,203.30
Board of Directors Contribution	\$ 2,000.00	\$ 2,500.00	\$ 2,000.00
General Fund - Other	\$ 2,441.72	\$ 15,379.79	\$ 10,095.27
Total General Fund	\$ 22,516.72	\$ 38,629.79	\$ 56,698.57
Core Programs			
Arc360 Civic Projects Income	\$ 1,000.00	\$ 7,994.00	\$ 4,180.93
Scholarship	\$ 4,500.00	\$ 4,788.70	\$ 6,888.70
Life Skills Academy Income	\$ 2,870.21	\$ 5,266.00	\$ 3,451.15
Giving Back Income	\$ 5,710.00	\$ -	\$ -
Total Core Programs	\$ 14,080.21	\$ 18,048.70	\$ 14,520.78
Total Income	\$ 36,596.93	\$ 56,678.49	\$ 71,219.35
Expense			
General Expenses	\$ 22,167.87	\$ 36,150.36	\$ 41,405.05
Sustaining Member	\$ 689.00	\$ -	\$ 8,194.75
Arc360 Civic Projects Expense	\$ 480.00	\$ 4,411.09	\$ 3,934.88
Scholarship Expense	\$ 5,623.31	\$ 6,358.59	\$ 7,406.77
Lifeskills Academy Expense	\$ 2,400.79	\$ 3,202.90	\$ 4,529.09
Giving Back Expense	\$ 3,838.96	\$ -	\$ -
Total Expense	\$ 35,199.93	\$ 50,122.94	\$ 65,470.54
Net Income	\$ 1,397.00	\$ 6,555.55	\$ 5,748.81

Period	Sep '11 - Aug 12	Sep '12 - Aug 13	Sep '13 - Aug 14
OPERATING ACTIVITIES			
Net Income	\$ 1,397.00	\$ 6,555.55	\$ 5,748.81
Adjustments to reconcile Net Income to net cash provided by operations:			
Pledged Donations	\$ (825.00)	\$ (1,986.37)	\$ 760.22
Accounts Receivable	\$ 462.95	\$ -	\$ -
Accounts Payable	\$ 565.00	\$ 2,418.86	\$ (2,883.86)
Net cash provided by Operating Activities	\$ 1,599.95	\$ 6,988.04	\$ 3,625.17
Net cash increase for period	\$ 1,599.95	\$ 6,988.04	\$ 3,625.17
Cash at beginning of period	\$ 1,260.17	\$ 2,860.12	\$ 9,848.16
Cash at end of period	\$ 2,860.12	\$ 9,848.16	\$ 13,473.33

Note:

1. Revenue recognition:

AASuccess recognizes funds from individual and organization donations, along with the income of its core programs and projects as revenue.

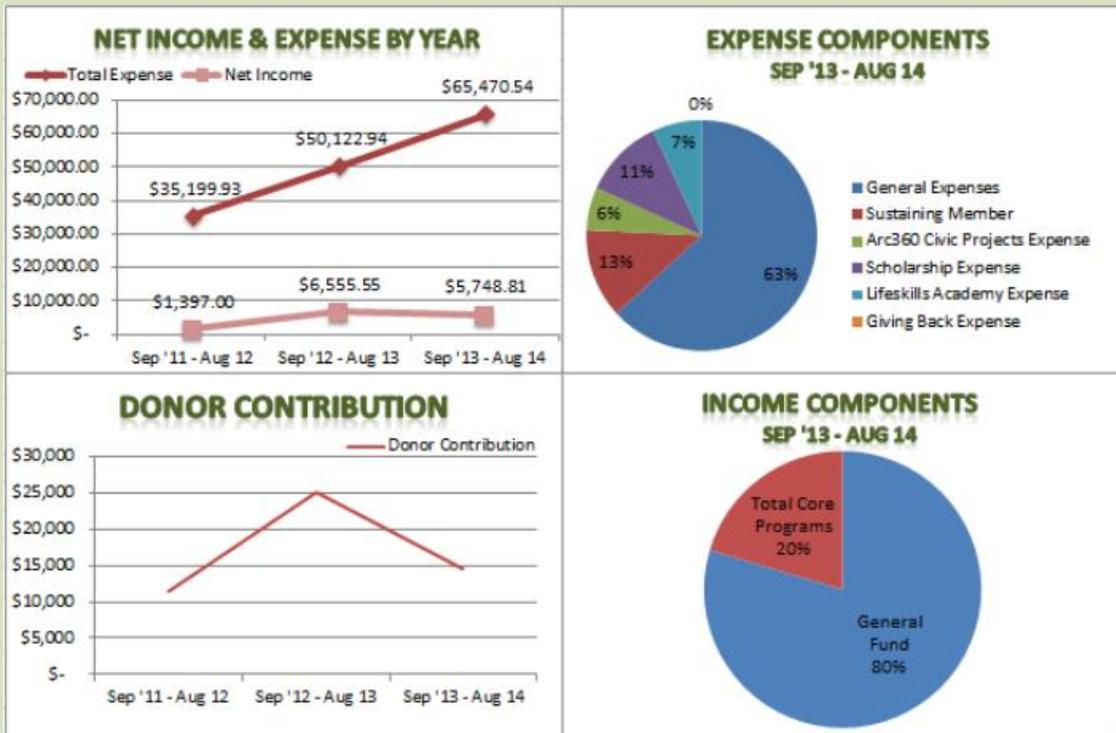
2. Salary expense:

Hard-skills and life-skills coaches for LSA program of AASuccess donate their time and effort to teach LSA students. Therefore, there is no coach salary expense involved in any financial statements of AASuccess.

3. Account Receivable:

Account receivable within the Asset section of the Balance Sheet is the Pledge Donation account.

AASuccess Balance Sheet (In Dollars)			
As Of Date	Aug 31, 12	Aug 31, 13	Aug 31, 14
ASSETS			
Current Assets			
Checking/Savings	\$ 2,860.12	\$ 9,848.16	\$ 13,473.33
Accounts Receivable	\$ 825.00	\$ 2,811.37	\$ 2,051.15
Total Current Assets	\$ 3,685.12	\$ 12,659.53	\$ 15,524.48
TOTAL ASSETS	\$ 3,685.12	\$ 12,659.53	\$ 15,524.48
LIABILITIES & EQUITY			
Liabilities			
Current Liabilities			
Accounts Payable	\$ 465.00	\$ 2,883.86	\$ -
Total Current Liabilities	\$ 465.00	\$ 2,883.86	\$ -
Total Liabilities	\$ 465.00	\$ 2,883.86	\$ -
Equity			
Unrestricted Net Assets	\$ 1,823.12	\$ 3,220.12	\$ 9,775.67
Net Income	\$ 1,397.00	\$ 6,555.55	\$ 5,748.81
Total Equity	\$ 3,220.12	\$ 9,775.67	\$ 15,524.48
TOTAL LIABILITIES & EQUITY	\$ 3,685.12	\$ 12,659.53	\$ 15,524.48



AASuccess Income Statement

Period Ending	31-Aug-13
Revenue	
Revenue From General Fund	\$38,630
Revenue From Core Programs	
Arc360 Civic Projects	\$7,994
Scholarship	\$4,789
Life Skills Academy	\$5,266
Total Revenue From Core Programs	\$18,049
Total Revenue	\$56,679
Operating Expenses	
Academy Lunch Program	\$1,771
Facilities Expenses	\$34,379
LSA Expenses	\$13,973
IT Equipment	-
Total Expenses	\$50,123
Net Income	\$6,556

AASuccess Balance Sheet

Period Ending **31-Aug-13**

Assets

Current Assets

Cash And Cash Equivalents	\$9,848
Net Receivables	\$2,811
Prepaid Expense	\$0

Total Current Assets	\$12,659
-----------------------------	-----------------

Long-term Assets

-

Total Assets	\$12,659
---------------------	-----------------

Liabilities

Current Liabilities

Accrued Operating Expenses	\$2,883
Unearned Revenue	\$0
Other Current Liabilities	\$0

Total Current Liabilities	\$2,883
----------------------------------	----------------

Non-current Liabilities

-

Total Liabilities	\$2,883
--------------------------	----------------

Equity

Retained Earnings

\$6,556

Unrestricted Net Assets

\$3,220

Total Equity	\$9,776
---------------------	----------------

Total Liabilities and Equity	\$12,659
-------------------------------------	-----------------

AASuccess Cash Flow Statement

Period Ending	31-Aug-13
Cash Flow From Operating Activities	
Net Income	\$6,556
Adjustments	
Depreciation and Amortization	\$0
Decrease in Account Receivable	\$1,986
Increase in Accounts Payable	\$2,418
Total Cash Flow From Operating Activities	\$6,988
Cash Flow From Investing Activities	-
Total Cash Flows From Investing Activities	\$0
Cash Flow From Financing Activities	-
Total Cash Flows From Financing Activities	\$0
Change In Cash and Cash Equivalent s	\$6,988
Cash, beginning of period	\$2,860
Cash, end of period	\$9,848

Chapter 5: Reporting Policies & Procedures

In this chapter:

- ✓ Work Plans
- ✓ Timesheets
 - Members
 - Volunteers
- ✓ Central Repository Folder
- ✓ Monthly Reports
- ✓ Quarterly Reports
- ✓ Annual Reports

Work Plans

Policy: Student members will refer to a Work Agreement for projects and programs. Non-Paid interns will refer to an “Internship Agreement” that detailing job descriptions, responsibilities, qualifications, and payments.

The AASuccess Work Plan seeks to improve all students’ performance by positioning them to continuously apply acquired knowledge. Because it is an ongoing process, both informal and formal reviews will help refine and improve the learning journey for AASuccess students.

Work Plan & Schedule for AASuccess Students:

The student under consideration for promotion should meet all of the following criteria for promotion:

- Required Core Training & Working Hours: Saturday, 10:00 AM – 2:00 PM
- Additional training and working hours can be arranged via special circumstances with the approval of the Executive Coach
- Number of Required Life Skills’ Training Hour: 1 Hour - Life Skills’ coaching hour is arranged based on available time slots and students’ own schedules
- Score at least 3 (a satisfactory performance) in all elements of the Performance Evaluation Form by an AASuccess Life Skills Coach

- Complete all required training at the time of the promotion

Flexible Work Plan for AASuccess Students:

Students may request flexible working arrangements based on parental and school responsibilities. Students and staff are encouraged to put the request in writing. AASuccess will consider this request, with all relevant facts and circumstances in deciding whether or not to agree to the request. Such a request will not be refused unless it is reasonable to do so. Students approved for flexible work practices will be treated no less favorably than any other students. Flexible working is not a barrier to promotion or supervisory responsibilities.

Circumstances that may be relevant to determining whether a refusal is or is not reasonable include, but not limited to:

- The nature of the employee's work and parental or school responsibilities
- The nature and cost of the arrangements required for a student to fulfill their family or career responsibilities
- The effect of the flexible working arrangements on the workplace, including the financial and quality impact on AASuccess
- The consequences for AASuccess of having the flexible working arrangements
- The consequences for the student of not having the flexible working arrangement

Sample: Internship Agreement: (template is subject to change)

Job Announcement

Position Title: Summer Student Intern

Work Location: Falls Church, VA

Organization

AASuccess is a non-profit organization whose aim is to assist high school and college students in enhancing the strengths and shoring up the weaknesses in their individual approaches to school work, career development, as well as addressing life's many challenges. AASuccess team members share a passionate desire to open the doors of opportunity. For more information, visit: www.aasuccess.org

Job Description

The President will continue to expand a high-performing, sustainable, and efficient organization with strong roots in diverse communities. Overseeing a current annual operating budget of \$____, the President will focus significantly on fundraising (corporations, foundations, individuals); developing strong working relationships with the Board of Directors and the Executive Committee; initiating and/or growing existing relationships with diverse partners (businesses & professionals, community & civic organizations); and overseeing program performance.

This is a compelling opportunity for a dynamic and innovative leader with a successful track record in the development of high-impact educational partnerships, fundraising, and organizational development to lead AASuccess to effectively advance its mission and vision.

Job Responsibilities

As a key member of the staff and a primary interface to the community, the President will reach goals and achieve objectives by excelling in the following business areas:

General Management

- Ensure involvement in AASuccess’ Core Programs and engaging the Programs’ stakeholders
- Establish and strengthen relationships with senior-level partners, including business leaders, community & civic organizations, and local & state Government officials
- In partnership with the Board of Directors and AASuccess partners, lead strategic development and growth planning efforts for the organization

Fundraising

- Partner closely with the Founders, Board of Directors, Board of Advisors, business partners, and supporters of AASuccess to cultivate relationships and effectively manage key donors
- Oversee the Sustaining Member Program to establish a consistent stream of locally-raised, philanthropic revenue that will sustain the business operations and fixed costs of the organization

Program and Team Management

- Manage effectively and coordinate closely with each of AASuccess’ s Program Coordinators to enhance existing relationships, assure program innovation, and conduct day-to-day operations required for high quality, on-budget program execution
- Provide collaborative leadership and mentorship to a passionate and committed team

Organizational Leadership

- Actively participate on the leadership team of the Board of Directors and professional mentors, helping to drive the operational strategy of the organization
- Cultivate a strong and transparent working relationship with the Board of Directors and professional mentors to ensure open communication of milestones and expectations, as well as successful capture of financial, programmatic, and impact performance metrics
- Provide monthly reports to the Board of Directors, Program Coordinators, professional coaches and mentors, and student members of each of the Programs to ensure appropriate support

Qualifications

- Be actively enrolled at an accredited university or college
- Maintain a minimum GPA of greater than or equal to 3.0/4.0
- Maintain a successful track record of at least three years of service and achievement in AASuccess
- Be a strategic and visionary leader with the ability to be resourceful, set clear priorities, and guide investment in people and systems
- Possess a deep understanding in fundraising – the ideal candidate has cultivated long-term engagements of both institutional and individual donors
- Be proficient with and demonstrate strong results in AASuccess’ virtual work environment

- Be an engaging communicator and problem-solver who is entrepreneurial and driven but also flexible, highly collaborative, and open to the inputs and thoughts of others; takes pride in mentoring students
- Have extensive networks in, and knowledge of, AASuccess' educational and philanthropic activities; ideally has specific pre-existing and successful relationships with the Board of Directors and professional Life Skills Coaches
- Have a proven track record of recruiting, retaining, and supporting the professional development of highly diverse and talented student team members
- Possess a passion for, and a demonstrated commitment to, improving the life opportunities of disadvantaged youth; be sensitive to the needs of diverse racial and ethnic populations

Internship Stipend

None.

Application Requirements

Submit a cover letter and résumé to: Info@aasuccess.org

Deadline: 15 May 2010

Diversity & Equal Opportunity

AASuccess values the diversity of our colleagues, partners, volunteers, and students; and encourages candidates of all ethnicity and backgrounds to apply for this position.

Signature Section

I, _____, agree to participate as the [position] of AASuccess from [dd/mm/yr] to [dd/mm/yr].

I have read and understand the Internship Agreement dated [dd/mm/yr].

I will perform my duties to the best of my ability, observe the job guidelines and the directions of the Board of Directors of AASuccess, meet time commitments, and provide adequate notice in the case of my absence so that alternative arrangements can be made.

SIGNATURES:

Intern

AASuccess Designee

Reporting Policies & Procedures

Policy: All members are required to report work hours and provide updates on current assignments on a biweekly basis.

Work Reporting Procedures & Schedule for all AASuccess Students:

- Required Core Training & Working Hours: Saturday, 10:00 AM – 2:00 PM
- Other Training & Working Hours can be arranged via special circumstances and approval of the Executive Coach.
- Number of Required Life Skills' Training Hour: 1 Hour - Life Skills' coaching hour is arranged based on available time slots and students' own schedules.
- AASuccess Students can request one personal excused absence per month.
- AASuccess will observe Holidays on Saturday(s), which fall within the period of December 24th to January 2nd.
- All students are required to report work progress to an immediate supervisor, and document the electronic time sheet on a biweekly basis.
- All executive student members, defined in the organization chart in Chapter 1, are required to document his or her corresponding program/project on the overall biweekly electronic status report to be submitted to the Board of Directors and coaching members. The biweekly status report must be reviewed and submitted by the AASuccess President.

Record Management

Policy: All current work pertaining to the essentials and “life line” of AASuccess **must be** stored online in our secured designated online server, allowing authorized AASuccess students to have access to appropriate files. The same expectations apply to all other programs.

Procedure: Login to Google Documents to find access to our secured files. The IT Administrator is responsible for creating a weekly back-up file. Back-up files will be kept for at least two weeks.

Timesheets

Policy: It is important to track the time that members and volunteers, paid and unpaid, spend on assigned tasks. Times should be rounded to the nearest appropriate quarter.

Members

Procedure: Login to Google Documents and complete working hours by 5:00 PM every other Friday for the biweekly reporting period.

Volunteers

Procedure: Submit volunteer hours on a monthly basis to the Executive Coach or designated AASuccess student.

Update on AASuccess Engine

Policy: Updates for projects or program assignments related directly to the management and of AASuccess should be provided to the Executive Team on a quarterly basis through the coordination of the Executive Coach. This is a program status report that the Executive Coach uses to track progress based on work plans and/or performance improvement plans.

Procedure: Use this template to provide program and project updates:

Progress Report

Policy: Updates for projects or program assignments should be provided to the Executive Team on a regular basis through the coordination of the Executive Coach/Director. This is a program status report that the Executive Team uses to track progress based on work plans and/or performance improvement plans.

Procedure: Use this template to provide program and project updates:

– PROPRIETARY INFORMATION – DO NOT DISTRIBUTE –

**Executive Team Status Report
(Friday, March 7th, 2014)**

Guidelines

Team Primary Leads – update your status accordingly, every week – by COB Wednesday.

Assistant Manager – verify & validate everyone’s entries & inputs for correctness & accuracy – by COB Thursday.

Everyone must be ready to report his/her task & activity status, every week – at the Saturday Team meetings.

All printed materials, e-mail attachments, slide shows, etc. must be ready for distribution and/or showing on the big screen – before the meeting time.

Website Overhaul	Primary: Vihanh Coach: Tuan	Backup: Julie
<u>Status:</u>		
<ol style="list-style-type: none"> 1. A draft of the AASuccess website presentation has been written for Chris and will be sent out next week; William will send out handover document by Monday. 2. Banner floating on the right of the website has been removed. 3. Individual teams will provide content for the website. 4. PSK has received the check payment. 		
<u>Challenges:</u>		
<ol style="list-style-type: none"> 1. We need quality pictures to be uploaded onto the new website. 		

<u>Look-Ahead at Next Few Weeks, Next Month, etc.</u>
1. Next week or so, we look forward to seeing Chris’s response after the draft is sent out.
<u>Updated Notes:</u>

Brochure Redesign	Primary: Jay (content) Backup: Nguyen (graphics) Coaches: Dieu, Jim
<u>Status:</u>	
1. Jay is working on new photos for the brochure. Jay will present progress this Saturday.	
<u>Challenges:</u>	
1. There are no challenges.	
<u>Look-Ahead at Next Few Weeks, Next Month, etc.</u>	
1. Look forward to finalizing and printing of the brochure once the content is finalized.	
<u>Updated Notes:</u>	

YouthCon Planning	Primary: Nini Backup: Minh Coach: Vihanh
<u>Status:</u>	
1. All student packages were received and uploaded on Dropbox. 2. All essay grades have been submitted by all judge groups. Grades have already been averaged by Khang and Bao. 3. Orientation is set for tomorrow, Saturday, March 8 th , 2014.	
<u>Challenges:</u>	
1. A challenge has been the short turnaround for essay judges to send in grades.	
<u>Look-Ahead at Next Few Weeks, Next Month, etc.</u>	
1. We are continually monitoring RSVPs to the Scholarship Luncheon.	
<u>Updated Notes:</u>	

E-Newsletter Publishing	Primary: Julie (content) Backup: Nguyen (layout) Coach: Tuan, Dave
<u>Status:</u>	
1. On-track a. February E-News has been recently distributed. b. Currently, the team is brainstorming new topics for the March E-Newsletter.	
<u>Challenges:</u>	
1. There are no challenges.	
<u>Look-Ahead at Next Few Weeks, Next Month, etc.</u>	
1. We look forward to new ideas regarding the new issue.	
<u>Updated Notes:</u>	

FUNdraiser Auction	Primary: Duy Backup: Khang Student Assistants: Kiet, Josh, Sean Coach: Tuan, Dave
---------------------------	---

<p><u>Status:</u></p> <ol style="list-style-type: none"> On-track <ol style="list-style-type: none"> All listings are up. We currently have 2 bidders on more than 5 items; totaling \$196.00 is in the pot. A blog and Facebook post has been written to boost popularity of the auction. Duy is currently reaching out to other networks to advertise the auction.
<p><u>Challenges:</u></p> <ol style="list-style-type: none"> The auction needs more popularity.
<p><u>Look-Ahead at Next Few Weeks, Next Month, etc.</u></p> <ol style="list-style-type: none"> Look forward to getting more bidders as we work on outreach.
<p><u>Updated Notes:</u></p>

External Seminars	Primary: Chau Coach: Dieu	Backup: Khang
<p><u>Status:</u></p> <ol style="list-style-type: none"> We have finalized PowerPoint for John Myers; he is being followed up with for logistics. 		
<p><u>Challenges:</u></p> <ol style="list-style-type: none"> There are no challenges. 		
<p><u>Look-Ahead at Next Few Weeks, Next Month, etc.</u></p> <ol style="list-style-type: none"> John Myers’s seminar is March 15th, 2014 at 11 AM. 		
<p><u>Updated Notes:</u></p>		

Internal Workshops	Primary: Tri Coach: Dave	Backup: Yen
<p><u>Status:</u></p> <ol style="list-style-type: none"> Rosie’s Workshop on Emotional Intelligence and Project Management is set for March 22nd, 2014 from 3-4:30 PM. 		
<p><u>Challenges:</u></p> <ol style="list-style-type: none"> There are no challenges. 		
<p><u>Look-Ahead at Next Few Weeks, Next Month, etc.</u></p> <ol style="list-style-type: none"> Google Calendar has been updated to reflect new dates. Look forward to more workshop updates. 		
<p><u>Updated Notes:</u></p>		

Blogging	<p>Bloggers: Khang & Chau (What’s Happening) Coach Tuan (any topic); Jr & Sr High Students (Monthly Challenges & Triumphs – with oversight by Vihanh)</p> <p>Primary: Khang Backup: Chau Coach: Jim</p>	
<p><u>Status:</u></p> <ol style="list-style-type: none"> A blog post has been written to promote the auction. A blog post regarding Brigitte Le’s seminar is being drafted; there is a delay since the speaker has not sent us her feedback. 		

<u>Challenges:</u>
1. There are no challenges.
<u>Look-Ahead at Next Few Weeks, Next Month, etc.</u>
1. Look forward to new blog regarding John Myers’s seminar.
<u>Updated Notes:</u>

Facebook Maintenance	Primary: Yen Coach: Will (?)	Backup: Richard
<u>Status:</u>		
1. Logistics: Facebook Likes stand at 125. 2. The YouthCon and Auction teams are continually updating Facebook to promote their events.		
<u>Challenges:</u>		
1. There are no challenges.		
<u>Look-Ahead at Next Few Weeks, Next Month, etc.</u>		
1. Look forward to new posts once major events come into full swing – YouthCon, Auction closing, etc...		

Business Support Community	Primary: Tran Coach: Dave	Backup: Will (?)
<u>Status:</u>		
1. Outreach about 2014 YouthCon was conveyed at the March 5 Executive Meeting, hosted by the Vietnamese American Community of DC/MD/VA 2. Bao reached out to potential supporters and/or SMP donors - Kevin and Khoi - Meeting was set up for March 15th - a visit by them will take place. 3. Livability Project - activated - preliminary feedback is done along with the ppt presenting the proposed plan - needs to be revised and more marketable in presentation. 4. There will be a strong presence of the Vietnamese American Community's stakeholders at the YouthCon Scholarship Ceremony - at least 40-50 attendees. 5. Jane Pane is currently communicating and helping PSK to secure a video contract with physicians. 6. Reached out to BSC partners to help Nam for a job opportunities - one promising track.		
<u>Challenges:</u>		
1. There are no challenges.		
<u>Look-Ahead at Next Few Weeks, Next Month, etc.</u>		
1. Look forward to March 15 th for potential supporters and/or SMP donors Kevin and Khoi.		
<u>Updated Notes:</u>		

AAS Today Broadcasts	Primary: Dan-Tam Coach: Dave	Backup: Bao
<u>Status:</u>		
1. Videos are being edited. Due to technical issues, the team may re-film. 2. A clip will be shown this Saturday. 3. Logo: “Building Connections for Empowerment”.		

<p><u>Challenges:</u></p> <ol style="list-style-type: none"> 1. There are no challenges.
<p><u>Look-Ahead at Next Few Weeks, Next Month, etc.</u></p> <ol style="list-style-type: none"> 1. Look forward to new videos being filmed after technical issues are resolved.
<p><u>Updated Notes:</u></p>

Project Evaluation

Policy: AASuccess students should routinely solicit feedback to improve themselves.

Procedure: Upon completion and submission of either the service or project, evaluations should be made. Project evaluations must address the following questions:

<p><u>Challenges:</u></p> <ul style="list-style-type: none"> • What was the goal of this project? • What were some outcomes you hoped to achieve? • Have you achieved all of your outcomes so far?
<p><u>Look-Ahead at Next Few Weeks, etc.</u></p> <ul style="list-style-type: none"> • List at least three things you learned during this process. • What are your next steps to complete the project?
<p><u>Updated Notes:</u></p>

At the end of the project, complete the following questions:

- What was the goal of this project?
- What were some outcomes you hoped to achieve?
- Did you achieve all of your outcomes?
- List at least three things you learned during this process.
- Which part of the project was most valuable to you and why?
- Which part of the project was least valuable to you and why?
- Please comment on the work of your team members, including the leadership efforts, and the overall implementation of the project.
- Do you think the project should be implemented again? Why or why not?
- If you could do it again, how would you execute this project?

Quarterly Executive Coach's Report

Policy: On a quarterly basis, the Executive Coach is expected to provide a report to the Board to keep them up to date on organization's activities.

Procedure: The Quarterly President's Report should follow the sample below.

Sample: Executive Coach's Weekly Report

Executive Team's Corner - February 20th, 2015

posted Feb 20, 2015, 2:26 PM by Trang Bui [updated Feb 20, 2015, 3:18 PM]

Management

- The visit to the Providence District Community Center on February 13th, 2015 at 7:00 PM went well - Results: Light Partnership recommended, e.g., monthly seminar and facility usage.
- Meeting with former students and/or alumni are encouraged by all students with an emphasis on professionalism, courtesy, and flexibility - need to not disclose non-publicly available information pertaining to AASuccess for those who are still in the blue program.
- Cultural Center Project: Potential sites have been solicited via David M.
- Lunar New Year - Chuc Mung Nam Moi everyone!
- Dave Nguyen has accepted the invitation to participate in the Welcome Home Vietnam Veterans Day (WHVVD) and screening of *Last Days in Vietnam* event.
- Finance Team's meeting has gone well with Jenny's assistance - Kudos to the new team's efforts in adjusting to the ongoing work and challenges.

LSA

- Two professional volunteers have checked our website and reviewed our SMP video "Chasing the dreams." Now they wanted to get involved as skills coaches/mentors - Next step is needed - Dave will invite them for an orientation/visit to our office.
- One eighth grader along with his mother will be visiting our office this Saturday at 11:30 AM for an orientation/interview session with Dave and his LSA staffs.
- The green students have now settled with our current work structure - we need to provide them with more directions/assignment aimed to improve their public speaking, mannerism, and individual assignments directed to reading comprehension and writing skills.

Arc360

- Please refer to this link to see our [Arc360 Program Data Analysis](#).

IT Update

- Server built project with Duy is on schedule. IT Team had a meeting with Duy on Thursday, February 19th, 2015 to begin project planning and setting scopes.
- IT improvements will resume progress next week.

Lunch/Office Administration Update

- Make to sure to keep our office clean before you finish for the day. All waste should be in trash can and paper/boxes should be in the recycle bin. .

Finance

- Mr. James Kelman generously donated \$500 for the second half of 2014 Contribution to AAS.

[\(Edit post\)](#)

Annual Reports

Policy: AASuccess shall prepare an Annual Report for public viewing by the end of January each year. The President shall work with the Executive Board to identify key highlights of the year and create a financial report.

Procedure: The Annual Report will be no longer than 5 pages and include the following:

- Photographs of activities
- Total contributed volunteer hours by all volunteers
- A general income statement
- Expense pie chart
- Sample:

<https://dl.dropboxusercontent.com/u/92741676/General%20Marketing/BSC/AASuccess%202012-2013%20AnnualReport%2C%20v4.0%20Final%2006Feb2014.pdf>

2012-2013 Annual Report



Version 4.0, Final – 06 February 2014



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Chapter 6: Programs & Projects

In this chapter:

- ✓ Life Skills Academy Program
- ✓ Arc360 Civic Projects
- ✓ YouthCon Scholarship Program
- ✓ Student Member Recruitment
- ✓ Programs for Professional Volunteers

Life Skills Academy Program

Overview

Balancing multiple cultures and languages, AASuccess students often struggle with English and bridging the cross-cultural divide. We help give them the confidence, and the hard and soft skills, to use their voices effectively in the community and at home. Newly arrived immigrant students do not have the connections and resources to establish themselves in the business community. We help our students to tap into a rich support community of business owners, elder citizens, seasoned and young professionals, state and local officials, non-profit organizations, school officials and universities.

Since 2007, AASuccess has induced positive change by providing critical life skills training and coaching to underserved minority students to prepare them for rewarding professional careers and productive lives of citizenship. Students find AASuccess to be a sanctuary in which their desire to learn and grow – an environment that they sometimes cannot find at home. Consequently, we have seen alumni in the program return, serving as Life Skills Coaches, as they start their professional careers and continue their professional development training via our LSA.

“The coaches helped me to make important decisions, which made a turning point in my life. A change happened – one that I thought I could not have ever done, and it was a good one. The members at AASuccess made me feel like this is another family, in which I can completely be honest and trust everyone. They are also my support system through my crises!”

Tran Pham

“It has been a blessing to be a part of AASuccess. I learned a lot and grew a lot on both hard skills and soft skills. My communication has been improving since I have been with AASuccess, since English is not my primary language.”

Yen Le

“I sought a Project Management certification as a result of encouragement from AASuccess students and professionals.

Students enrolled in the LSA, as well as alumni of the program, learn valuable life skills and are afforded personal, continuous, year-round training and career development. Each student works with coaches to hone their skills in critical thinking, problem solving, effective communication, and productive collaboration. Designed for students from middle school to university levels, the LSA curriculum covers a range of topics, to include:

- ✦ Citizenship
- ✦ Cultural Competency
- ✦ Emotional Intelligence
- ✦ Artful Communication
- ✦ Management & Leadership Essentials
- ✦ Business and Technical Skills
- ✦ Finances
- ✦ Entrepreneurship
- ✦ Mannerism & Etiquette
- ✦ Optimizing Life, Body & Mind

All students enrolled in the Life Skills Academy are offered real-world projects in groups of two to four teammates. These projects give the students a broad perspective on personal and professional interactions, as well as the opportunity to train on technical skills. While students may also access the courses online, the small group format seeks to promote team learning while honing team members' communication skills.

Apprentice Training Opportunities

AASuccess teams up with its Business Support Community to identify potential hands-on training opportunities where students get real-life work experience alongside working professionals. The Life Coach Executive usually makes the recommendation for apprentice training opportunities when he or she feels that the students are ready to “step-up” to this challenge.

In addition, qualified senior students are eligible for apprenticeships with the AASuccess' Business Support Community offering valuable work experience alongside professionals. To qualify, students must:

- complete a Life Skills Certification exam;
- maintain a GPA of 3.0 or graduate from an accredited university or college; and
- demonstrate reliability through attendance and time sheets.

Apprenticeship participants should expect:

- enhanced responsibility for projects (i.e., less direct guidance from coaches);
- interaction with real clients in real business cases; and
- opportunities for full-time, paid employment (after an initial training period).

Tuition and Schedules

New classes are available on a monthly basis. Times and dates of courses are determined and provided by AASuccess. Students are encouraged to look through the catalogue of course offerings and discuss their interests with their Life Skills Coach, so that the Life Skills Coach can help coordinate enrollment and participation. The tuition for the 40-week course – corresponding to a suitable level – is a modest \$3000 to cover basic operational and administrative costs, and is fully tax deductible.

Training

AASuccess provides students with adequate training to do their job safely and competently. AASuccess believes training is a two-way process. We encourage students to participate and to highlight any gaps in their own skills or knowledge.

Training includes internal on-the-job training, written instructions such as standard operating procedures, coaching, external training unrelated to AASuccess, and courses offered by AASuccess. This comprehensive training can span through a period of five years for high school and college students, addressing various responsibilities at each level of learning in the program.

Career Resources

AASuccess Life Skills Academy partners with community businesses and professional volunteers to help students and alumni pursue career opportunities. As a member of the Academy, students will gain access to innovative learning tools, a support community, and resources to help them launch careers that are centered on wellness, integrity, and citizenship.

Academy Benefits

Students enrolled in the Academy have the ability to gain access to standards-based courses that support core academics. The courses are aligned to in-demand job skills that require expertise in areas such as oral and written communication, critical reasoning, interpersonal communication, leadership, and technical skills.

Not only do Academy instructors receive ongoing training and support, but they are also supported by a collaborative community of volunteer professionals and community businesses.

Education & Training Benefits:

AASuccess provides students with a toolkit to develop vocational and professional career goals.

- Vocational Training and Professional Development through Life Skills Academy:
 - Business and finance training
 - Resume writing and interview training
 - IT training
 - Website development training
 - Emotional intelligence training
 - Professional mannerism & writing etiquette training
 - Opportunities to become part of AASuccess Executive Leadership
- \$6,000 worth of educational resources provided by the AASuccess Business Support Community
- LSA Program Description and Courses:

<http://www.aasuccess.org/what-we-do/life-skills-academy/program-overview.html>

Arc360 Civic Projects

The AASuccess Arc360 Civic Projects (Arc360) provides real-life opportunities for students to give back to their community. Arc360 is an initiative designed to allow students to apply their technical and life skills, and “*Perfect the Act of Giving Back*” to the community. It encourages LSA students to collaborate and work on their strengths and weaknesses outside of the classroom, with the guidance of caring coaches and professional volunteers.

Name of Project	Project Duration	Project Description
Emerging Scholars Program	2013 - Present	AASuccess assists low-income students make the financial, academic, and personal transitions from public schools to independent schools.
Hepatitis B Initiative-DC	2013 - Present	AASuccess leads this preventative Hepatitis B outreach to Vietnamese Americans, participating in local health fairs and seminars. We also work towards instigating a Hepatitis B Awareness Day in Virginia.
Livability Project	2013 - Present	This project aims to address the long-term needs of the Vietnamese community, with a current focus on facilitating inter-generational dialogues.
Viet Nam Human Rights Day	2012 - 2013	AASuccess students help organize the annual Viet Nam Human Rights Day event in Washington, DC. This event aims to help raise awareness for the oppressed in Viet Nam.
Vietnamese Health Fair	2009 - Present	AASuccess assists the Vietnamese Medical Society of North East America (VMSNA) to provide basic, free health care and education to the Asian American community. In 2012, AASuccess was the principal organizer, and the Fair received a recognition award from the Fairfax County Health Department.
YouthCon Scholarship	2009 - Present	This annual scholarship awards students in 8 th -12 th grades for their community involvement. YouthCon is a community project organized and hosted exclusively by AASuccess.

With unyielding support from our sponsors and donors, AASuccess was able to execute the 2013 Annual YouthCon Scholarship Program with flying colors. Immediately after the same event

ended in FY2012, we kick-started the initiative to refresh, renovate, and expand the Program. The year-long effort involved tasks and actions to reach outward to a wider audience in the community – with the ultimate goal to award more scholarships to more hard-working and deserving students. One primary sponsor was instrumental in helping us achieve our goal in FY2013, and we proudly recognize Eden Center for their continued commitment to the Program. Eden Center has supported the Annual YouthCon Scholarship Program since its inception, and we thank them for their generous annual contributions. AASuccess could not have grown and accomplished as much as we did without our BSC Partners, and generous sponsors and donors. The following quotes are from two of our key professional volunteers, who invested much needed time and talent into the 2013 YouthCon Scholarship.

“We will celebrate the achievements of young scholars, whose thoughtful essays on community service and giving back should give us great hope on what their future contributions may be. In celebrating their achievements tonight, we will also share in the success of AASuccess, an organization empowering young adults and young professionals to acquire the life skills so necessary to succeed not only in academics but also in life. We should know that being “book smart” is only but one element to success and that AASuccess is passionate about addressing the issues of leadership, emotional intelligence, stress management, and citizenship – so that our youth may become productive leaders in our communities at large.”

**Nina Un, Founder of Care to Lunch
(a charity-focused lunch series in Tyson’s Corner, VA)**

“I think listening to and hearing from the candidates helped me think back when I was in high school many years ago, and how a program like AASuccess can be so instrumental in students’ livelihood – whether it be academically, professionally or socially.”

**Michael Chang, Professional & BSC Partner
(serving as Presentation Judge for Annual YouthCon Scholarship)**

The photographs below highlight some of our activities with community organizations during FY2013 and FY2013.

"Five years from now, I see the business aspect of giving back to AASuccess. I see my business growing and I see it giving back to AASuccess monetarily. Hopefully, I am able to give back in some way. Whether it be through health seminars, fitness classes, or something like that."



Bao Nguyen

AASuccess Alumnus

Be' N Motion Fitness, Founder

"I would describe AASuccess as a life-changing experience. I gained a healthy mentality that made



*Wellness Health Fair, 2012 – **We foster a civic spirit!***



Viet Nam Human Rights Day, 2012



YouthCon Communication Skills Workshop, 2013

YouthCon Scholarship Program

AASuccess grants annual scholarships and recognition awards to qualified students. Since 2010, qualified high school and undergraduate college students from the Washington, D.C. Metropolitan Area compete for AASuccess' scholarships worth up to \$1,000. The number of scholarships awarded each year varies based on the amount of sponsorship. Application requirements may also vary each year. The scholarship judging committee is comprised of a panel of at least five members of the community who are actively engaged in civic programs or projects.

Program Objectives:

- Emphasize writing, and oral presentation skills
- Measure character, commitment to community service, and communication skills (oral and written)
- Encourage students to be more open-minded and to think about things from a “big picture” perspective
- Support students financially
- Collaborate with other organizations in the community to support and motivate students

Demographic:

- High School students
- Predominantly Asian American, but other ethnicities are welcome to participate

Timing:

- Summer Program (May – July)

The scholarship program should always be student-managed and operated, but students will receive support and assistance from professional-volunteers and/or coaches.

On-the-Spot Award

AASuccess students may be presented with an “On-the-Spot” Award each year based on their overall performance. Below is a sample recommendation form for the “On-the-Spot” Award.

RECOMMENDATION FOR ON-THE-SPOT-AWARD

1. Name of Student:
2. Program Unit:
3. Award Amount: \$25 gift card for educational purposes (Cannot exceed \$50 per instance or \$250 per performance year)
4. By checking this box, I certify that I have informed the finance coordinator of my intention to provide the student this award.
5. Signature & Title of Nomination Official
 /Dave Nguyen/
 Life Skills Academy Program, Director
 I certify that this award does not exceed the \$250.00 total limit for On-the-Spot awards for this performance year.

6. Date: _____, 2012

7. Narrative:

From _____ to _____ 2012, your significant efforts above and beyond your normally assigned duties were critical in support of AASuccess' operations of our core programs. Your goals clearly demonstrate AASuccess' continuing commitment to provide the best possible products and services to its valued customers and stakeholders throughout the community.

Your leadership, extraordinary creativity, and focus on results, combined with your personal initiative and direction, made this initiative a success. Your efforts are deserving of this on-the-spot **award**.

8. **Student Signature & Date:**

Recruitment

AASuccess seeks to recruit both student members and professional volunteers on an ongoing basis.

AASuccess welcomes student members as young as 14 years old. Our program has benefited many individuals, but the greatest impact has been on economically disadvantaged youths, particularly those preparing for college.

Student commitment is important to AASuccess sponsors. Students must commit at least four to five hours a week to join AASuccess' Life Skills Academy.

AASuccess partners with organizations and professionals that can help identify and recruit potential students who are hardworking, dedicated, and serious about making a difference in their own lives and in the world.

In addition, professional volunteers are routinely sought to share their skills and knowledge and serve as Life Coaches. You will find in the Appendix a list of professional volunteers who have contributed to AASuccess.

Acknowledgement of Receipt and Acceptance

I hereby acknowledge receipt of the AASuccess Operations Manual. I understand that it is my continuing responsibility to read and know its contents. I also understand and agree to the policies and procedures described in this manual.

I understand that this is not an employment contract for any specific period of employment or for continuing or long-term employment. Therefore, I acknowledge and understand that unless I have a written employment agreement with AASuccess that states otherwise, I have the right to resign from my volunteer work, internship, membership, or employment with AASuccess at any time with or without notice and with or without cause, and that AASuccess reserves the right to terminate this professional relationship for any lawful reason.

I have read, understand, and agree to all of the above. I have also read and understand the AASuccess Operations Manual.

Signature: _____

Print Name: _____ Date:

Confidentiality Pledge

I hereby acknowledge receipt of the Confidentiality Policy described in this Operations Manual. I understand and pledge to abide by the policies and procedures described in the Confidentiality section of the manual.

Signature: _____

Print Name: _____ Date:

Retain this copy for yourself.

Acknowledgement of Receipt and Acceptance

I hereby acknowledge receipt of the AASuccess Operations Manual. I understand that it is my continuing responsibility to read and know its contents. I also understand and agree to the policies and procedures described in this manual.

I understand that this is not an employment contract for any specific period of employment or for continuing or long-term employment. Therefore, I acknowledge and understand that unless I have a written employment agreement with AASuccess that states otherwise, I have the right to resign from my volunteer work, internship, membership, or employment with AASuccess at any time with or without notice and with or without cause, and that AASuccess reserves the right to terminate this professional relationship for any lawful reason.

I have read, understand, and agree to all of the above. I have also read and understand the AASuccess Operations Manual.

Signature: _____

Print Name: _____ Date:

Confidentiality Pledge

I hereby acknowledge receipt of the Confidentiality Policy described in this Operations Manual. I understand and pledge to abide by the policies and procedures described in the Confidentiality section of the manual.

Signature: _____

Print Name: _____ Date:

Return this copy for AASuccess' record.

APPENDIX A – Board of Directors

BOARD

Board of Directors

The AASuccess Board of Directors is a distinguished group of civic-minded business leaders, career professionals, and former Presidents of AASuccess, each having experience in making strategic decisions in leading, executing, and advancing the organization's mission. A Business Support Community consists of established business owners and professional volunteers supports the Board by partnering with AASuccess students and providing critical resources.



James Alstrum-Acevedo (Chair)

Dr. James Alstrum-Acevedo is the current Chair of the Board of Directors. Jim serves as a Patent examiner at the U.S. Patent & Trademark Office and is a part-time student at the George Washington University Law School. Jim earned his Doctorate in Chemistry from the University of North Carolina at Chapel Hill in 2005. He graduated cum laude with university honors from Illinois State University, where he double majored in Chemistry and Spanish. He enjoys being a member of AASuccess and helping the organization's student members develop as leaders and achieve their dreams.



David Montanari

David Montanari earned his Doctorate in Biochemistry from the University of South Carolina in 2004. As a professional U.S. patent examiner and one of the primary founders of AASuccess, he mentors and helps secure business and career opportunities for many AASuccess students. As the current President of BCLC Global, he is pursuing a mission of guiding the 1st generation immigration youth to obtain not only success in their professional lives, but also happiness in their personal lives.



Dave Nguyen

Dave Nguyen attended the Virginia Polytechnic Institute and State University, and earned his Master's Degree from Johns Hopkins University. Dave is a recipient of the Exceptional Career Award signed by the Under Secretary of Commerce for Intellectual Property, and outstanding leadership awards for fourteen years. Dave believes that the key to success is the ability to demonstrate the mind (making sound decisions), voice (speaking a language that all can understand), ears (actively listening to others and hearing what is important to them), heart (building trust and respect among those we lead), and hands (using collaborations and partnerships).



Dieu Le

Dieu Le obtained her Master of Architecture from University of Maryland. Currently, she is an Architect at the Administrative Office of the US Courts. Since joining AASuccess in August 2013, Dieu believes that through creatively integrating our Life Skills Academy with real hands-on civic projects, we cultivate our students' hearts and minds not only with practical knowledge, but also with strong cultural understanding and compassion that come from helping others.



James Kelman

James Kelman served as senior public diplomacy advisor at the U.S. Department of State from 1999 to 2007. James is currently serving as the Director of the Korea-US Science Cooperation Center (KUSCO). James directs an interesting exchange program between the U.S. and Korea, in which young university aged students from Korea come to the USA for a professional internship, preceded by up to 5 months of intensive English language study. This is a government-to-government program, and KUSCO is a sponsor of this program. James is currently serving as one of our volunteer life skills coaches at the Life Skills Academy.



Scott Plein

Mr. Scott Plein is the owner of Equinox Investments, LLC, a real estate development, investment, and management company located in Chantilly, Virginia. He is also a partner in numerous construction and service companies, also located in Northern Virginia. Scott is involved as an advisor and board member for several non-profit organizations, including Capitol Hospice, Gleaning for the World, Hopkins House, and AASuccess. Scott also serves as a Mentor on the Arc360 Program, sharing his valuable insights with AASuccess student members, and coaching them in business development and management.

APPENDIX B – Volunteers

Our Volunteers include professionals, alumni, qualified high school and college students who are enrolled in a training and development curriculum with AASuccess through the Life Skills Academy. The students are learning to balance the demands of their academic, social, personal, and professional lives, while helping to manage and sustain AASuccess operations.

Team Name	Team Member	Title	Contact Information
Life Skills Academy	Dave Nguyen	Executive Director	dave.nguyen@asuccess.org
	Minh Pham	LSA Manager & Coach	minh.pham@asuccess.org
	Vihanh Tham	LSA Manager & Coach	vihanh.tham@asuccess.org
	Trang Bui	Associate LSA Manager	trang.bui@asuccess.org
Executive Associates	Michelle Kim	Executive Associate	michelle.kim@asuccess.org
	Tran Pham	Executive Associate	tran.pham@asuccess.org
Brand/Marketing Team	Dieu Le	Manager	dieu.le@asuccess.org
	Nguyen Nguyen	Associate Manager	nguyen.nguyen@asuccess.org
	Yvonne Nguyen	E-Newsletter Coord.	yvonne.nguyen@asuccess.org
IT Team	Rico Li		rico.li@asuccess.org
Finance Team	Nam Tran		nam.tran@asuccess.org
	Thao Bui		thao.bui@asuccess.org
	Sean Le		sean.le@asuccess.org
	Cho-kiu Wan		choku.wan@asuccess.org
Arc360 Civic Projects Team	Tran Pham	YouthCon Scholarship	tran.pham@asuccess.org
	Trang Bui	Health Fair Coord.	trang.bui@asuccess.org
	Christina Le	Tennis Clinic	christina.le@asuccess.org
	Sarah Nguyen	Tennis Clinic	sarah.nguyen@asuccess.org
Life-skills Coaches	James Kelman	Life-skills Coach	james.kelman@asuccess.org
	Dave Nguyen	Life-skills Coach	dave.nguyen@asuccess.org
	Dieu Le	Life-skills Coach	dieu.le@asuccess.org
Skills Mentors	Rosemary Saberton	Skills Coach	rosemary.saberton@asuccess.org
	Son Tung	Skills Coach	son.tung@asuccess.org
	David Montanari	Skills Coach	david.montanari@asuccess.org
	Dinh Nguyen	Skills Coach	dinh.nguyen@asuccess.org
	Kevin Lee	Skills Coach	kevin.le@asuccess.org
	Bao Nguyen	Skills Coach	bao.nguyen@asuccess.org
	Vihanh Tham	Skills Coach	vihanh.tham@asuccess.org

APPENDIX C – Business Support Community



Collaborative efforts between AASuccess and its Business Support Community are integral to provide resources, coach and help mentor our students to become future leaders and agents for positive change.

Business Community Shareholders

AASuccess Sustaining Members
BCLC Global
AASuccess Alumni and Volunteers

Tam Kim Inc.
Progressive Skills (PSK)

Major Community Partners

Charity Group of VA Affection
Virginia Delegate Kaye Kory
Fairfax County Health Department
HBI-DC Foundation
SBTN-DC
The White House Farm Foundation

Novel Smiles
Social Capital Solutions, Inc. (SCS)
St. Stephen's & St. Agnes School (SSAS)
The Vietnamese community of DC, MD & VA
Eden Center
United Solutions



"As a Sustaining Member for the past four years, supporting AASuccess has been one of my most productive investments."

Scott Plein | *Principal, Equinox Investments, LLC
Platinum Sustaining Member*



"There is a dynamic group of young people meeting in Falls Church each week, which will definitely impact their generation. They will challenge your own perceptions about reaching personal goals, but may just make you re-think where you are in your present career path."

John Myers | *Administrative Office of the United States Courts*

APPENDIX D – Alumni

Alumni consist of former student members who have completed their training with AASuccess and graduated from accredited institutions. Many of these alumni, while busy with their established careers, continue to contribute to AASuccess as active volunteers and mentors of current student members. These loyal and committed professionals are highlighted below, in alphabetical order.

Update: <http://www.aasuccess.org/who-we-are/our-staff.html>