



READ NB
Improving lives through literacy

TUTOR COORDINATOR HANDBOOK



MODULE 4 - DATABASE, REPORTS & RECORD-KEEPING

REPORTING & RECORD-KEEPING

READ NB's Learner Management application is a Salesforce Application along with a community to manage the activities of each council's learners and tutors. Within Salesforce, the Tutor Coordinators are able to input and update all tutor, learner and volunteer contacts, manage the Tutoring Assignment which connects a learner and a tutor, and monitor learner progress by accessing the assessments goals and sessions for each assignment.

Like our previous database, each council can see only their own tutors and learners. The READ NB Team will have administrative access to assist all councils.

Tutor Coordinators will be performing the following tasks:

- Adding New Learners, Tutors & Volunteers
- Managing their tutoring profile information
- Reporting on Tutoring Activities

Tutor Portal - Salesforce is a customer relationship management system (CRM). It has been configured for READ NBNB by cloudStack Services so that we can use it as a secure database with individual portals for each of the tutors to access their learner's information. All tutors will login through a secure "Tutor Portal" where they will only have access to their own learner's information. The tutor portal will also have direct links to the Resource Page on our website.

One thing you will note is that tutors are not required to separate their preparation time and their tutoring time. They can still feel free to make a separate session note for each, or simply tack on their preparation time to notes for the tutoring session.

The new system has a lot of functionality, however, our primary focus is the database as it pertains to tutors, learners and peripherally, volunteers. You will notice as soon as you open a contact sheet that it can also be used as a donation management system.

You will find short guides on the Tutor Coordinator Portal (on READ NB's website) to help you become familiar with the basics of adding a new tutor or learner, adding assessment info, goals, and sessions notes, as well as running basic reports.

Do not hesitate to reach out to Alison or Carol for one-on-one tutorials or any additional support you may need.

NOTE: Tutor Coordinators are responsible to remind tutors to update their session notes in the Tutor Portal on a quarterly basis (minimum). They are also responsible for ensuring all tutor and learner information is complete and updated in the system on a quarterly basis (minimum).

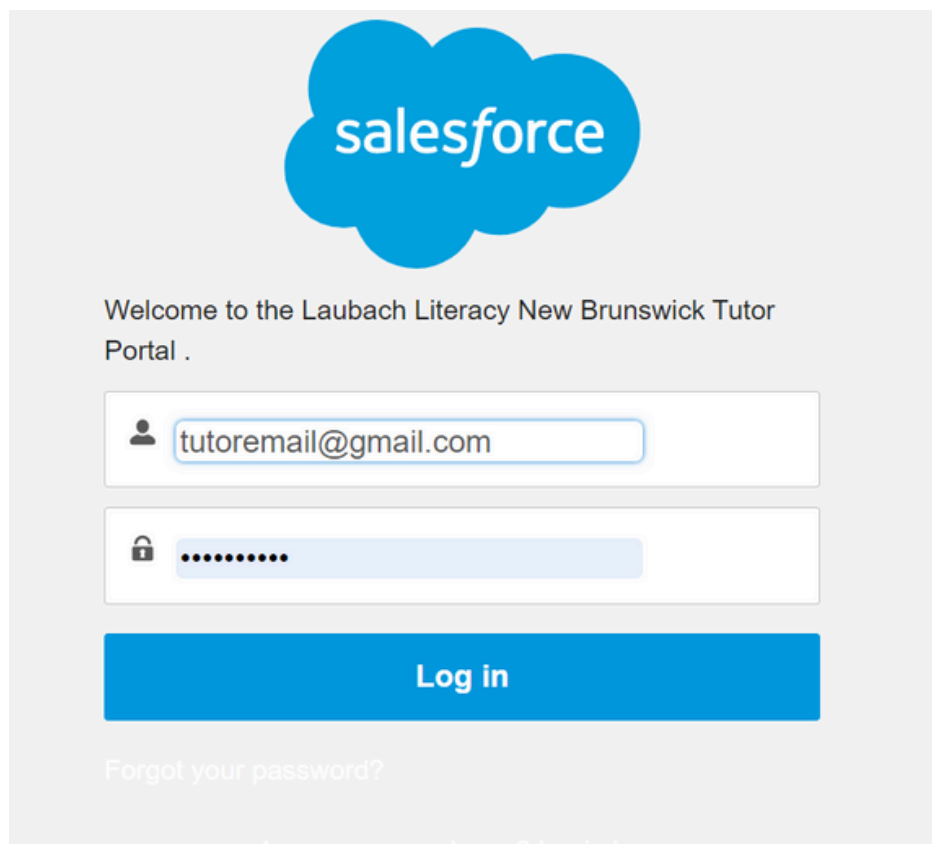
The Tutor Portal

Once lessons begin, remind the tutor to log their sessions on the portal as soon as possible after the lesson has ended. (It is easy to forget details that might be helpful in the next lesson!)

All that is required is the date and duration of the lesson together with some brief details of what was covered during the session i.e., "Read Challenger 4 Lesson 2 and discussed consonant blends" update or add any information to their Progress Notes.

Tutors can access the database via their own Tutor Login Portal. Their Username will be their own email address. After they complete their online training, as long as their information has been logged into the database, their account will be activated. At that time they will receive a welcome email, with a temporary password from READ NB. They will prompt them to go in and reset it.

Once they have successfully logged in, they will be brought to a landing page showing the details of their learner (or learners):



The image shows a login interface for the Laubach Literacy New Brunswick Tutor Portal. At the top, there is a blue cloud-shaped logo with the word "salesforce" in white. Below the logo, the text reads "Welcome to the Laubach Literacy New Brunswick Tutor Portal .". There are two input fields: the first is for the username, containing "tutoremail@gmail.com", and the second is for the password, represented by a series of dots. A blue "Log in" button is positioned below the password field. At the bottom, there are two links: "Forgot your password?" and "Are you an employee? Login here".

Learner Profile

Once the tutor has successfully logged in, they will be brought to a landing page showing the details of their learner (or learners). By clicking on the Assignment # they will be brought to a page where they can access information on and edit their learner's:

- Basic Information
- Session Logs
- Learner Assessment
- Learning Goals.

Session Logs (6+)			New
Session	Date	Hours	
Session-02210	2023-04-27	1.5	▼
Session-01987	2023-03-08	2.0	▼
Session-01864	2023-03-02	2.0	▼
Session-01851	2023-02-24	1.5	▼
Session-01837	2023-02-13	1.5	▼
Session-01748	2023-01-25	1.0	▼
			View All

Learner Assessment (1)			New
Assessment	Assessment Date	Type	
LA0105	2022-02-18	CARA	▼

Logging a Tutoring Session

New Session Log

Information

* Date

* Tutoring Assignment

Session Notes

* Hours

Session

Enter Session Information

New Session Log

Information

* Date

* Tutoring Assignment

Session Notes

* Hours

Session

RECORD KEEPING / MAINTAINING RECORDS

The Tutor-Coordinator is responsible for keeping accurate up-to-date records of all council members, tutors, and learners. Information should include names, mailing address, phone number, e-mail address, and training dates of any READ NB training taken.

Having the most current information is essential for insurance purposes and ensures a quick contact for any number of reasons (e.g., matching tutors to learners, arranging meetings, recruiting, or telling them about training and other council events).

IMPORTANT: All print files and folders containing personal information must be stored in a lockable filing cabinet.

COUNCIL RECORDS

The Tutor Coordinator is required to ensure all records are updated on a quarterly basis (minimum). READ NB will periodically, pull statistical information concerning council activities, active tutor and learner numbers, tutoring hours, and learner progress achievements.

For funding purposes, and to ensure that at any given time we have an accurate snapshot of current learner and tutor numbers and tutoring activity, it is important to monitor the database on a regular basis to ensure the following:

- New learners have been added.
- Tutors currently working through the online tutor training series have been recorded.
- Inactive learners and tutors have been recorded correctly.
- Tutoring hours are being logged regularly.
- Session information and Learner Progress is being updated.

AFFILIATED COUNCIL SUMMARY

As per the affiliation agreement, the tutor coordinator along with the board president must fill out an annual activities report and a self-audit report each year (December 1). These documents serve multiple purposes including, but not limited to, updating our Directors & Officers Insurance. They include much of the information we previously required as part of the annual grant request. *(These reports have been included at the end of this module. A link to the reports to fill in online will be sent to each council on/about Nov 1.)*

General Volunteers and Board Volunteer Hours – your council may also from time-to-time request data regarding volunteer hours. You may decide to track that separately, or you can choose to add the volunteers to the database, and to give portal access to your volunteers, like you do tutors, so they can track their own volunteer hours. Reach out to Carol or Alison for more information on using the database to track volunteer hours.

LEARNER RECORDS

Learner's personal information must be accurate, complete, and up-to-date as is necessary for program purposes. The Tutor Coordinator should periodically review the session notes that their tutors are keeping. Ensure that they are 1) entering session notes, 2) providing progress notes periodically (not just entering the hours) and 3) reviewing/updating their goals.

Access to and Use of Personal Information

As part of the learner intake process, learners are made aware of and provide consent, for their personal information to be collected. The primary use of this information is for their tutor (and future tutors) to be able to make decisions regarding their learning path.

The secondary use of their personal information is administrative in nature (e.g., management, finance, marketing, or research).

If their personal information is being used for any other purpose, consent must be secured before using personal information for purposes not originally identified with the learner.

In addition to on the database, you may have a learner's personal information contained in paper files, in emails, or it may be verbally communicated between tutors, Tutor-Coordinators, and READ NB staff. Whatever its source, any information obtained should be kept confidential, used for direct service delivery purposes that respond to learner needs, and is to be protected by security measures that protect it from intruders and accidental disclosure (e.g., computer password, locked access to offices or file storage locations).

Physical access to computers, files, or areas where personal information is stored should be limited. Security measures should be applied and followed in controlling physical access to personal information stored at the community level.

For tutors to work effectively, they will have access to personal information on a "need-to-know" basis only. READ NB (and each learner) relies on the personal integrity and professionalism of READ NB member councils and volunteers to access only the information required to do their work with learners.



Disclosure/release of personal information outside of our organization (for primary or secondary uses) should not occur without the expressed written consent of our learners. Disclosure without consent may occur only if:

i) It's necessary to protect the health, safety, or security of the client or another person.

ii) It's needed for a police investigation, provided a subpoena or search warrant is given.

iii) It's required by law, such as the mandatory reporting of abuse.

iv) Data has been rendered anonymous by deleting/ scrambling all personal identifiers.

Note: Threats to personal information may occur through human error, technical failure, deliberate acts, or natural disasters (fires, floods, etc.).

See READ NB's Confidentiality & Privacy Policy

Appendix 1:

ANNUAL ACTIVITIES REPORT DUE DECEMBER 1st

Please provide a short report that includes the following:

1. Name of Affiliated Council
2. List of Board Members
3. Programs offered (e.g. one-to-one tutoring, conversation circles, cooking to learn, book club, other)
4. Number of Active Tutors
5. Number of New Tutors since April 1st
6. Number of Active Learners
7. Number of New Learners since April 1st
8. Number of Learners on your waitlist
9. Number of matched tutor/learner pairs
10. Number of other volunteers
11. Number of times your board has met over the last year
12. A copy of your latest financial statement/annual budget (using template provided by LLNB)
13. A short summary of what you have done over the last year to improve community engagement and awareness

Please note: LLNB does not provide an annual activities report to its councils in December. Their annual activities report is part of their Annual Report, presented at the Annual General Meeting in June and available thereafter online at readnb.ca.

Appendix 2:

AFFILIATED COUNCIL: ___ (your name here) ___

ANNUAL SELF-AUDIT CHECKLIST

DUE DECEMBER 1st

Governance & Accountability

- The board meets either in-person or virtually on a regular basis. *(As defined by our bylaws.)*
- The board follows a set of by-laws, which are reviewed regularly.
(Year of last review _____)
- Board sets annual target for the number of learners/tutors.
- The board sets an annual budget.
- The board has established priorities for the year.
- Affiliated Council representatives participates in planned workshops, education and engagement events presented by LLNB throughout the year.
- Affiliated Council representatives attends the LLNB Annual General Meeting either in-person or virtually.
- The Affiliated Council adheres to the standard policies and procedures defined by LLNB as noted in Appendix 1 (a) of the Affiliation Agreement.
- The Affiliated Council ensures that learner and tutor data is update to date, at a minimum on a quarterly basis *(for March 31st, June 30, September 30, and December 30.)*

Learners

- The Affiliated Council has actively encouraged learner recruitment throughout the year.
- Learners are asked to sign the LLNB Consent Form
- Learners are asked to sign the PETL Consent Form
- Learners are assessed using prescribed assessment techniques approved by LLNB.
- Learners have access to a wide variety of resources, approved by LLNB.
- Learners are aware who to contact should they have concerns/complaints.

Training & Tutors

- The Affiliated Council has actively encouraged tutor recruitment throughout the year.
- Tutors have received training from LLNB.
- Tutors are aware of the continuing education options provided by LLNB.
- Tutors are reminded regularly to post the time/details of their tutoring sessions in the tutor portal.
- Tutors are aware who to contact should they have concerns/complaints.
- Tutors are familiar with any policies (Affiliated Council/LLNB) that may affect them.

Community Engagement

- The Affiliated Council has actively promoted the program in their community.
- The Affiliated Council reached out to community partners regularly to remind them of its programs/services.

Special Events and/or Fundraising

- The Affiliated Council holds special events and/or fundraising during the course of the year.
- To ensure that the organization has appropriate insurance coverage, the Affiliated Council has made LLNB aware of any special events and/or fundraising that they have planned. (And it has been done so in a timely manner to ensure that insurance riders may be added if needed.)

Note: Not all special events and/or fundraising events will require additional insurance, but it is important to discuss with LLNB who manages both the liability and Directors and Officer's Insurance for itself and its Affiliated Councils.

On behalf of the board of _____ (council name) _____, I attest that the checklist has been reviewed by the board, and the information is true, accurate and complete to the best of our knowledge.

SIGNATURE: _____ **DATE:** _____

PRINTED NAME: _____ **POSITION:** _____