



EMPLOYEE PORTAL BASICS



INTRODUCTION | Why Do We Need an Employee Portal?

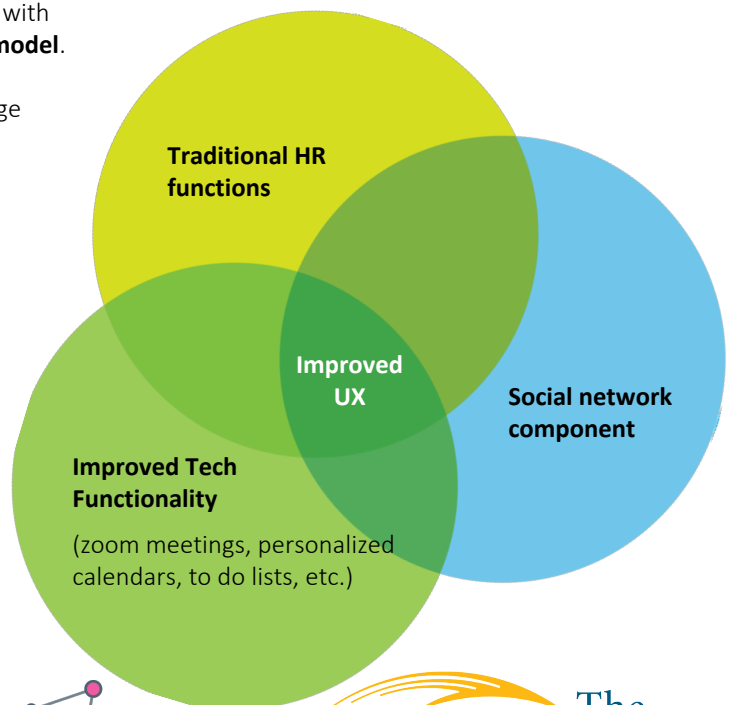
TOMORROW IS HERE. Now, more than ever, a company's Employee Portal is as vital as a team meeting space, an employee breakroom, or, at the very least, the water cooler. These unprecedented times, along with the undeniable power of the millennial workforce, are challenging the conventional approach to cultivating organizational culture. Whether it is transparency, knowledge transfer, going paperless, mobile technology or "WFH" scenarios, we can all agree that the most logical place to connect with employees is through a virtual meeting place.

SHAPING OUR CULTURE. The portal acts as a digital hub where individuals "do work." This facilitates efficiency and productivity, helping to shape the organization's culture through three dimensions: collaboration, engagement, and innovation.

- **COLLABORATION.** The Employee Portal provides a place where all individuals can go to find information, to find experts, to ask questions and receive answers. Duplicate work is avoided as individuals can locate project artifacts or individual experts. Department, project, and team sites are all tightly integrated and searchable.
- **ENGAGEMENT.** The Employee Portal provides an easy way for content to be published without IT intervention. Further, the portal enables two-way communication, allowing individuals to not only listen, but also to participate in conversations.
- **INNOVATION.** The Employee Portal allows products/projects to be produced more quickly, more cost effectively, and with higher quality and business impact. Many of the best ideas come from the frontline workers but many organizations struggle to empower those individuals. The modern portal allows rapid innovation and often includes mechanisms to collaborate and engage between customers and business partners.

OUR APPROACH. We are reinventing the way we harness our resources and keep our teams engaged. We are combining the **traditional portal** where compliance issues, company documentation, rules and regs and other HR materials live with a more interactive, **social / tech focused model**.

This approach will allow us to better engage teams and leadership, while providing an experience they will actually enjoy.



Creating people-centered environments is why TCE exists. Our core, our purpose, and our very reason for being is centered around people. So why not create a digital space for the people with whom we spend most of our waking hours. Here are a few features to consider:

1. **A people finder.** Employee search functions are often the most highly utilized part of an employee portal, allowing intuitive searches by community or location, role, business group, or project experience, etc.
2. **Employee profile photos.** Putting a name to a face makes it easier to connect with colleagues, especially those in other locations.
3. **Photos of employees engaged in meaningful activities.** Pictures help tell the TCE story faster than words can. Use photos to keep people informed, motivated, and in touch.
4. Always show who has **authored content, and/or who to contact** about it. The more authors and contributors, the more engagement we can cultivate.
5. **Employee recognition** throughout the employee portal is a great way for people to show appreciation for one another more often and in real time.
6. **Idea generation and organization-wide participation.** In many organizations, employee engagement is an elusive best practice. Think of the employee portal as a virtual suggestion box, or a community bulletin board, where people can share ideas as well as causes.
7. **Make it easy for people to contribute content.** An easy-to-use template and tool kit are available to make content generation easy and efficient.
8. **Community and team sites.** Team sites are temporary sites for smaller groups of people. Community sites are used more for ongoing topics of interest, which may be important to a wide range of people and are stronger in social features.
9. **Blogs/vlogs about important topics** or subject matter experts. Since there are also blogs on the external website, we can play with the timing a bit where we offer “**first looks or sneak previews.**”
10. **Make it easy to give feedback** about the portal. Allowing comments and feedback is vital for continuous improvement, as it gives developers insight into how people are integrating the portal’s tools in their everyday work life.
11. **Employee-generated news.** Employee-generated news content also helps inform others about people’s interests and expertise.
12. **Regularly highlight people** from different TCE offices/hub sites. Real people. Real Stories.
13. **Maximize web analytics** to surface what’s actually useful to people. Surfacing pages most clicked on, viewed, and opened is a great way to let your employees identify the most useful resources on your portal, and help others to find them.
14. **Create clear guidelines, education and governance** around people and social features so they feel comfortable participating. Some people may want to share photos of their personal lives, whereas others may prefer to keep their profiles more professional. Clear guidelines and communication will make users more comfortable.
15. **Have a community manager, or social champion,** who promotes the portal and makes people comfortable with the technology. Champions are often regular staffers who are natural influencers in their peer groups and social circles. Keep an eye out for these “superheroes” and invite them to be part of this project.



OVERVIEW. If you've ever sent out a mass email, joined a group chat, or collaborated on a document using Google docs, OneDrive, or something similar, you are using the basic elements of an Employee Portal. Companies use Employee Portals to communicate internal information to their employees quickly and efficiently through an internal server. **Our employee portal is about connecting with the people who live, breathe, and embody our brand.**

WHAT IS THE DIFFERENCE BETWEEN INTRANET AND PORTAL?

- **INTRANET.** This is TCE's **internal website**. Like all responsible and cohesive organizations, the TCE family needs to communicate about "work matters" or information that is specifically related to internal TCE business that is for "employees only."
- **EMPLOYEE PORTAL.** A Portal is the gateway (or entry point) by which you can stay connected with, and updated about, our organization. It generally contains basic employee tools (such as forms, time sheets, letterhead templates, etc..) and can be customized to provide other mass communication materials, such as e-newsletters, videos, and other shared assets that many departments may find useful.
- **PURPOSE.** Whether we refer to it as "intranet or employee portal," the function is the same. The Employee Portal is about PEOPLE. The portal can be designed to have "work-focused sections" such as compliance issues, staff training, company directories, etc. However, it can also serve to inspire the TCE family through mission-focused messaging, stories, videos, and blogs, and serves as a space to recognize and appreciate employees whose work and efforts go above and beyond.

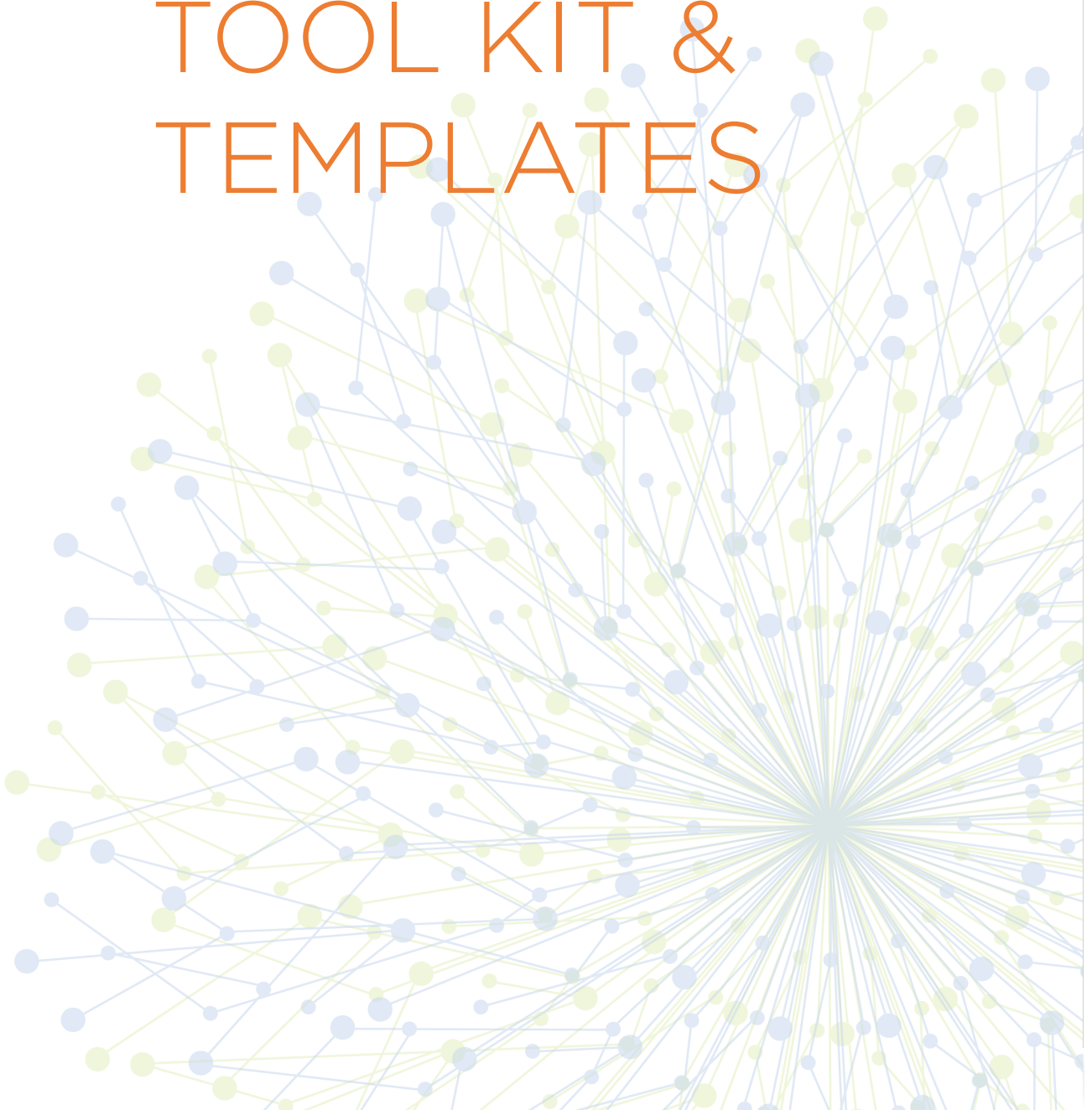
USING THE EMPLOYEE PORTAL TO COMMUNICATE WITH STAFF

1. **Enterprise-wide Communications.** By using the employee portal to convey immediate and timely information, TCE staff know they are among the first to be informed. Staff who feel valued, listened to, and involved are more positive about their jobs and the companies they work for. Engaged employees tend to have a better understanding of the big picture and their contribution to it and will help create a positive tone when delivering the message to outside stakeholders.
2. **Realtime Connection and Interaction.** Employee portals provide employees/departments with spaces and opportunities to connect, interact, and share the latest successes, experiences, and stories. This can also be a safe space in which questions can be raised and best practices can be shared. For an enterprise like TCE, an employee portal will help connect everyone with colleagues who work in other locations, or who are working remotely (from home, or elsewhere).
3. **Project Management.** The employee portal can help efficiently manage projects by providing a centralized location to handle tasks, such as submitting expense reports and mileage logs, registering for events, and booking rooms.
4. **Shared Knowledge.** There is no need to reinvent the wheel with an employee portal. Use it to share files, tools, group calendars, photos, contact information, and knowledge bases (such as fact sheets, position papers, slide decks, etc.).
5. **Build Camaraderie.** The sky's the limit when it comes to using the Employee Portal to build camaraderie and boost morale. With our "new normal," everyone has had to adjust to working via Zoom meetings, conference calls, and webinars. Use the employee portal to recognize outstanding work by teams or individuals, and to promote mission-focused successes from which others may learn.





EMPLOYEE PORTAL TOOL KIT & TEMPLATES



CONTENT DEVELOPMENT / INFRASTRUCTURE.

Our Employee Portal follows a specific hierarchy of information. The diagram below illustrates the types of information shared in the Employee Portal, the person/team providing information, as well as the action that may be required of staff.

CHECKLIST & TEMPLATE. To make it easier and more efficient, we are providing a checklist of items as well as a PowerPoint template that you can use when providing content for publishing review. You may be asked to collaborate with a Communications Specialist to ensure brand consistency and quality.



ENTERPRISE-WIDE INFORMATION

Information Source:

TCE Leadership
Managing Director of Communications

Employee Role

Read, share, implement (as needed)

Examples

Mission, Vision, Annual Report, Enterprise-wide changes and initiatives

DEPARTMENT INFORMATION

Information Source:

Directors and Managers
Managing Director of Communications

Employee Role

Read, share, implement (as needed)
May provide details / photos, etc.

Examples

Department successes, event invitations

INDIVIDUAL

Information Source:

All of the above
In some cases, staff

Employee Role

Respond/Engage

Surveys
Time
sheets

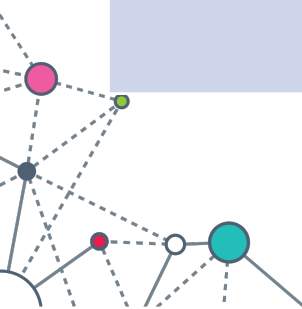
1. PLAN YOUR CONTENT

1. Define Your Content Goals
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time-bound
2. Define your audience
3. Audit existing content or look at other websites that have similar department functions
4. Feature at least one department activity or news message that reflects or helps promote TCE's 3 Bold Ideas (see table in section 2, Developing Content)
 - **People Power** – promote civic activism
 - **Reimagining Our Institutions** – champion racial and social equity
 - **21st Century Healthcare for All** – prevention, wellness, access to care
5. Create / collect content assets
6. Use the PORTAL PAGE TEMPLATE to put in your content: photo(s) + write up + Call to Action / Author /contact info
7. Email your template to Employee Portal coordinator
8. Monitor performance of your page (check comments / hits / shares)



2. DEVELOPING CONTENT. A content map is a plan to deliver the right content, to the right people, at the right time. Use the grid below to help you create your content. Feature at least one department activity or news message that reflects or helps promote TCE's 3 Bold Ideas. Once you have your key theme, write the the story and make it more compelling using interviews, quotes, statistics, and photos

Main Portal Content	My Department Content [Enter Department Name]
<ul style="list-style-type: none"> • People Power promote civic activism 	<p>Suggestion:</p> <ul style="list-style-type: none"> • Feature a service your department offers that helps underserved communities
<ul style="list-style-type: none"> • Reimagining Our Institutions champion racial and social equity 	<p>Suggestion:</p> <ul style="list-style-type: none"> • Feature a team member of your department who advocates to fight racial and social equity (either as part of their job or as a philanthropic / volunteer activity in their spare time)
<ul style="list-style-type: none"> • 21st Century Healthcare for All prevention, wellness, access to care 	<p>Suggestion:</p> <ul style="list-style-type: none"> • Promote a service or community program your department knows about or is involved with that promotes wellness, prevention, or access to care • Offer health tips or activities that you or your team members have benefitted from.





YOUR PAGE CONTRIBUTES TO TCE'S STORY.

An effective message will...

1. Widen the sphere of people with whom you can share it;
2. Help people figure out who knows what;
3. Provide tools, technologies, and processes for people to help each other and work collaboratively;
4. Help people easily share the knowledge and expertise they are bringing to your department (and for others to receive it);
5. Motivate people by sharing successes, the progress of colleagues and teams, and important contributions to the organization; and
6. Support the mission, vision, and purpose of TCE through your team's work and achievements.

MESSAGE BOX. This is a tool to help you focus and prioritize the message(s) you would like to share with your audience. Your portal page is designed so that you can focus on the most important news items that you would like others to know about your department.

<p>AUDIENCE(S): Who are you communicating to? Be as specific as possible</p> <p>BENEFITS OUTCOMES What improvements will result by addressing the issue</p>	<p>List your audience here. You will create a stronger message when you speak specifically to an audience that you know well.</p>	<p>SO WHAT? Why should the audience care? What's the downside of not addressing the issue?</p>
<p>What's in it for them?</p> <p>How will their attention or participation make an impact?</p>	<p>ISSUE: State the topic / main idea / problem you are working to address</p> <p>Focus on one issue that you would like to share, or receive some response about, or solicit help to address</p> <p>Be brief, be clear, include a human/emotional element that will engage your audience</p> <p>Pick an emotional trigger: Compassion? Fear? Gratitude? Hope?</p>	<p>Why should your audience care?</p> <p>What will happen to your cause or your issue if no one participates?</p> <p>If you don't need the audience to care or to participate or at least learn more, then you may need to change your topic.</p>
<p>SOLUTION(S): What strategies and tactics can we implement to create change</p> <p>This is an opportunity to engage your audience.</p> <p>Suggest some actions that you are planning to take or have already taken. Invite your audience to take part in the action(s) that you are taking, or ask for suggestions to help improve your plan</p>		

DESIGN TOOL KIT | Use this template to make Your Department Portal Page pop!

YOUR PORTAL PAGE TEMPLATE. This is a standard Department Portal Page. Use this template to populate with information about your department that you would like to share. Remember to include photos, text, names and contact information of your team to encourage engagement, collaboration and inquiries about the meaningful work that you are doing. This template will be provided to you as a PowerPoint document that you can fill in with text and photos. When approved, our intranet development team will use these materials for your online portal page.



TOP NAVIGATION BAR: this is the top of your portal page. No need to customize this top section.

IN THE YELLOW BAR, ENTER: YOUR DEPARTMENT NAME | Your department mission or a brief summary of what you do

FINANCE | Responsible, Compassionate Fiscal Management



IN THIS SPACE, PLACE:
A PHOTO OF YOUR TEAM IN ACTION
OR A PHOTO THAT PROMOTES YOUR MOST CURRENT ACTIVITY

Minimum size of photo: 5 x 7 inches
Minimum resolution: 300 dpi

IN THIS SPACE, PLACE:

HEADLINE OF YOUR STORY

Sub-headline of your story

BYLINE : Name and title of the person who wrote the story

Your article or write up. Not to exceed 300 words in 12-point type.

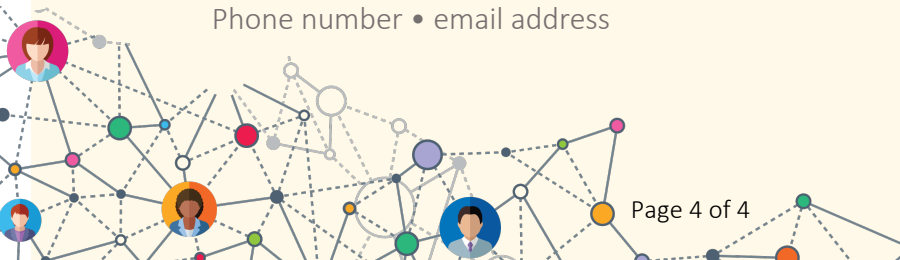
AT THE END OF THE ARTICLE BE SURE TO INCLUDE THE FOLLOWING:

For more information, please contact:

Name of contact, title

Department

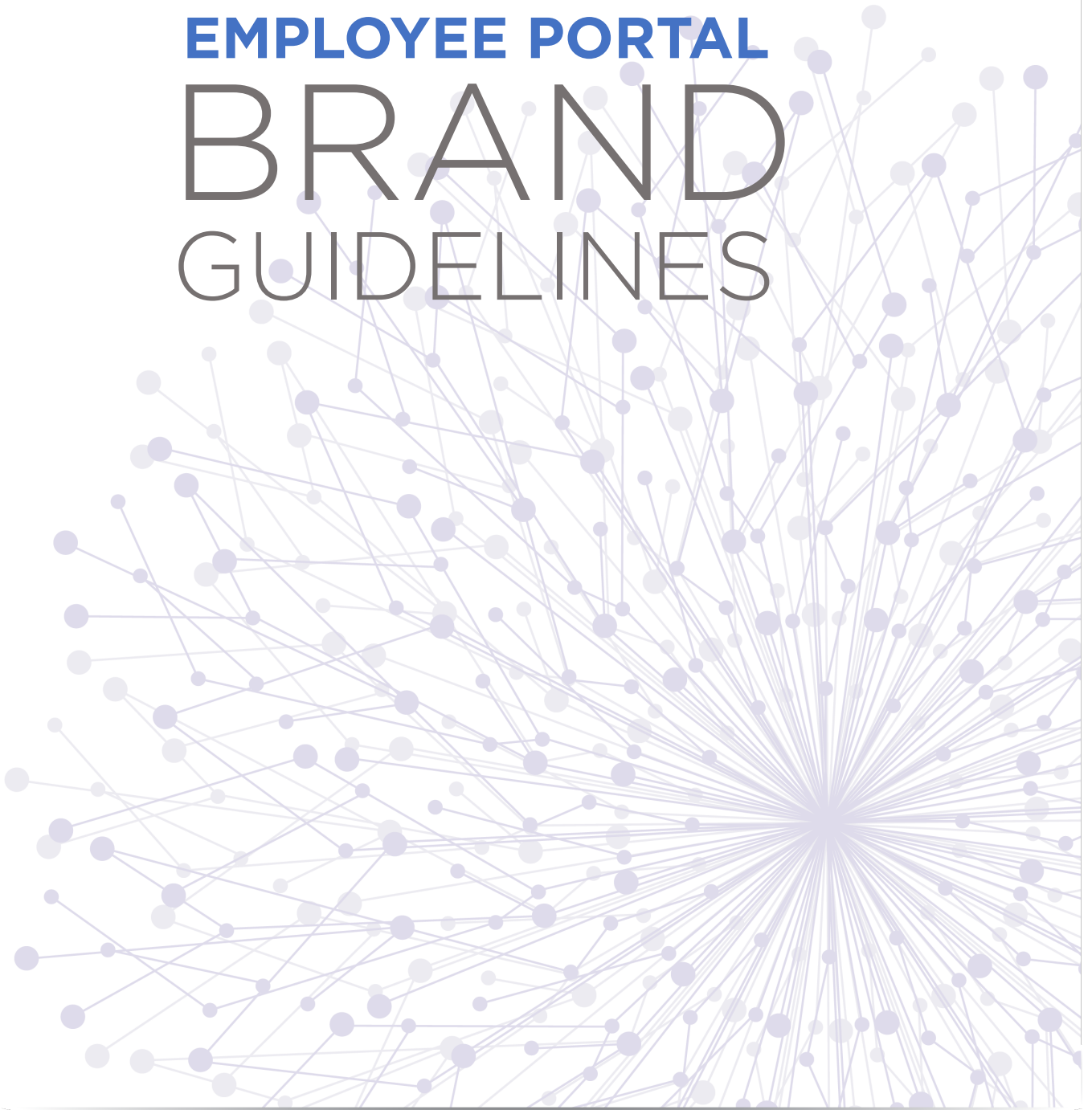
Phone number • email address





PROPOSED

EMPLOYEE PORTAL
BRAND
GUIDELINES



WHAT IS A BRAND STYLE GUIDE? A brand style guide is a quick reference visual guide that communicates not only the look and feel of your brand, but also provides basic specifications for your brand assets (logo, colors, fonts, patterns, etc.).

WHY DO WE NEED A BRAND STYLE GUIDE?

1. The Style Guide ensures branding elements are consistent whenever we present ourselves through our communications materials.
2. The Style Guide helps to remind our team members to use the right fonts and colors to keep our look consistent.
3. Ensure outside contractors (videographers, designers, stakeholders, etc.) are consistent with our look when they are developing material for us, or when our stakeholders partner with us.
4. To ensure cohesion and consistency and continued brand recognition when introducing new products or programs.
5. While we encourage consistency with our publications and other communications materials, we realize that we need to make an exception when it comes to using fonts for material that we publish online (social, twitter, internet, intranet, etc.). To ensure consistency, please refer to our list of selected web-friendly fonts (see item 4 in the Branding Elements section).

BRANDING ELEMENTS FOR TCE's EMPLOYEE PORTAL

1. Logo Use

• PRIMARY LOGO

1. We use a primary logo which carries the name, "The California Endowment."
2. The primary logo identifies our organization and should be used in all communications published by TCE.
3. As much as possible it should be used in its original iteration.
4. Only in unavoidable circumstances should we opt to use an all black version or a "reversed-out" (all white) version of our logo.
5. Under no circumstances should we change the color combination of our primary logo.

• SECONDARY LOGO

1. This logo is used when identifying communications, programs, products, or initiatives related to Building Healthy Communities.

2. Colors

- Our primary logo colors are:
 - Blue – PMS
 - Yellow – PMS

3. Typography for Print and Publications

- Use sans serif fonts for Main headers, titles, and subtitles
 - We use **OPEN SANS** font family
- Use serif fonts Body copy:
 - We use **WHITMAN** font family
- Display fonts (used for emphasis or standalone text)
 - We use **Memphis** font family

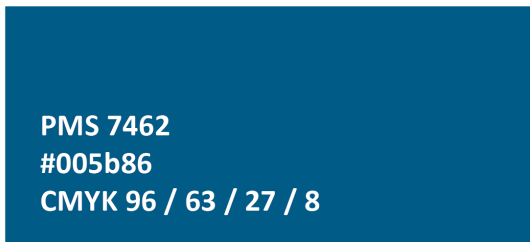
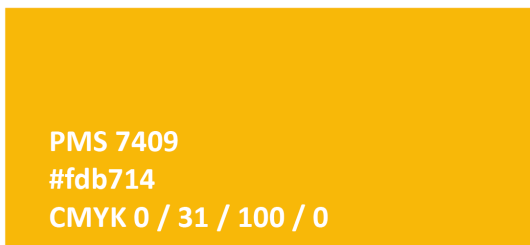
4. Typography for Online use. Because web browsers are notoriously finicky about font compatibility, we use the following web-friendly fonts:

- San Serif: Arial, Helvetica, Calibri
- Serif: Times Roman, Georgia, Palatino

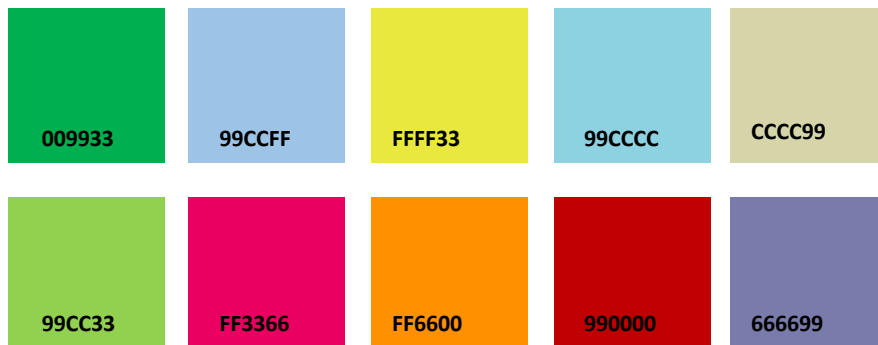
GUIDELINES FOR COLOR USE

1. These colors should be used for TCE's primary logo
2. When creating materials, complementary colors should be used
3. As much as possible, use black or dark colors for text, especially for body copy.
4. White type can be used against lighter colors, provided the fonts are legible.

PRIMARY COLOR PALETTE



SUGGESTED WEB SAFE COLOR PALETTE TO COMPLEMENT PRIMARY COLORS



Primary Logo



This logo is used for all materials related to TCE.

Secondary Logo



Along with the primary logo, this logo is used for all materials related to our Building Healthy Communities initiatives and communications

REVERSED OUT OR ALL BLACK LOGO

Only in unavoidable circumstances should we opt to use an all black version or a “reversed-out” (all white) version of our logo.



NEVER CHANGE THE COLOR OF THE LOGO

