

Moan-less Team Management

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It's All About the Goal

What is the Goal for your Team?
Where are You in Your Process?

- Securing LOIs
- Formalization
- Leadership Development
 - Involvement
 - Promotion
- Coordination
 - Motivation
 - Inspiration



BE REALISTIC!!!



What's Your Organization's Capacity??

CLARITY



- Is Senior Staff on Board
- Is the CEO
- Does your Board have clarity?
- Have members on the Committee Changed?
- Has Staff Changed?
- Is the Board Still on Board?

CLARITY

- Is everyone on the Same Page?
- Why Am I Here?
- Where Am I?



NEW YEAR-NEW TEAM

- Review Goals & Priorities
- What's Changed?
- What has worked?
- What needs tweaking?

A black square containing the text "Happy New Year" in a stylized, purple, 3D font with white outlines and shadows.

Happy
New
Year

The Basics*

- Reviewing the Goal of the Program and of the team
- Role Clarification
 - Who does What
 - Committee Members
 - Board
 - Staff



*Handout

What's Your Plan/Priorities?

- Awareness/Education
 - Presentations
 - Events
 - Social Media
 - Newsletters
- One on One Conversations – The Ask
- Tracking – Who's on First?
- Monitoring Success – Stats
- Communication – Who Knows What?
- Stewardship – Individual? Group? Calls/Letters?
- Celebration – How and Who



Setting Priorities

- What's most important?
 - What resources are needed?
- What's the 2nd priority?
 - What resources are needed?



- Role of Team Members
- Role of Staff
- Role of Others

We Do Good Stuff – Legacy Plan 2019-2020

Priority #1 – Secure LOIs

Activities:

- Board Solicitation/Completion
- Committee Member Presentation/Solicitation
- House Party
- Newsletter Article
- Mail Appeal
- Social Media



Priority #2: Stewardship

Activities:

- Event
- Newsletter
- Letters/Calls
- Legacy Society
- Newspaper Ad



Getting it Done- The Honey Do

Priority # 1: Securing LOIs / House Party

Activity	Lead	Staff	Due	Status
House Party	Madeline	Brenda	10/15	In Progress
House Secured	Madeline	Brenda	8/15	Done
Invite List	Madeline	Melissa	9/1	In Progress
Food	Madeline	Melissa	9/30	Done
Invitations		Melissa	9/15	Scheduled
Fol. Up Phone Calls	Team	Brenda	10/1	Scheduled

Successful Meetings

- Everyone has fun
- Everyone knows why they are sitting at the table and what is expected of them
- There is continuity from earlier meetings
- There is a sense of accomplishment
- Team members feel heard and valued
- There is consistent follow-up



Meeting Summaries*

Essential!!!

- What were the issues discussed
 - Outcomes
 - Follow-up – Who Does what
 - No He Said/She Said
-
- Ideally – Summaries out within a week and resent with meeting notice



*Handout

The Honey Do – Mtg. Follow-Up*

Assignment	Who	Due Date	Status
Newsletter Article	Janie	August 15	
House Party	Madeline	August 15	
1 st Draft Letter	Harvey	August 1 st	
	Jess	August 10	
RH Ad	Brenda	August 10	

*Handout

Donor Tracking

Donor	Lead	Next Step	Due Date	Status
Haim Shalom	George	Call for Coffee	Aug 1 st	Set Coffee for Aug 3 rd
Moses Schwartz	Jess	Meet for formalization	Sept 1 st	Awaiting call back
Livvy Garcia	Brenda	Follow-up	Aug 1 st	

Challenges

People Not Following Through!

Too many questions run out of time



Motivation*

- Donors aren't returning calls
- Team members losing focus
- Lull after the 1st or 2nd Year



*Handout

Team Building

The power of the ice breaker:

- Favorite Bagel
- Favorite Music
- Next place you'd like to travel
- Take a penny and have everyone share a memory from that year



Keys to Success!

- ✓ Clarity
- ✓ Communication
- ✓ Follow-Up
- ✓ Fun

