



Turning Far Flung Staff and Volunteers Into a Team

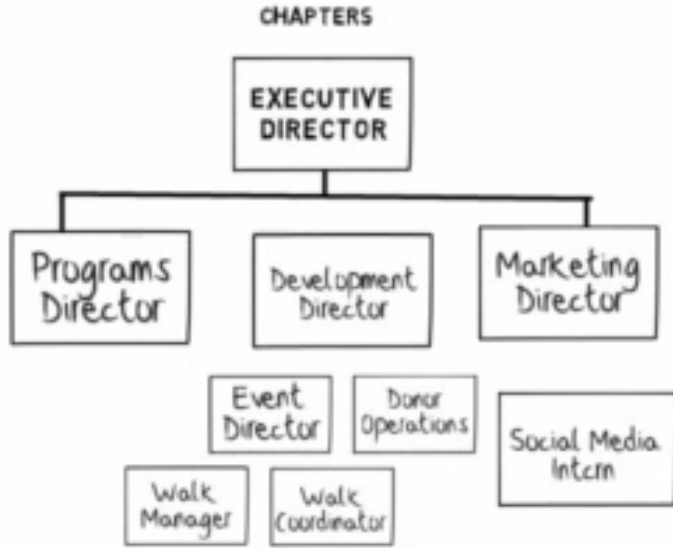
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SITUTATION

- Dotted-line reporting
- Conflicting objectives
- Constant turnover
- _____

Dotted-Line Reporting



Dotted-Line Reporting: How to make the most of it!



For Managers

- Seek understanding
- Take time to explain
- Provide team exposure
- Develop cross-functional teams

For Staff

- Clearly articulate your role
- Practice good self-leadership
- Be inquisitive
- Work with all managers to prioritize tasks

Conflicting Objectives



National

- Consistency & alignment
- Industry standards
- Accountability
- National execution abilities

Chapters

- Urgent needs
- Local benefit
- Employee management
- Execution



Development

- Revenue
- Donor engagement
- Messages by channel and audience
- Brand extensions
- Urgent

Marketing

- Consistent brand and messaging, regardless of channel
- Calendar management
- Balance program vs. development needs

Conflicting Objectives: Finding Peace



For National

- Clearly articulate goals (what and WHY)
- Build goals from bottom up vs. top down
- Successful chapters = successful national organization
- Integrate into job descriptions and reviews
- SIMPLE customizable dashboard tool

For Chapters

- Clearly articulate goals (what and WHY)
- Consider what is best for ALL
- Do unto others...
- Genius of the AND
- Just say NO
- Learn from others
- COMMUNICATE

Conflicting Objectives: Finding Peace



For Development

- Provide explanation of branding needs
- Give advance notice of fundraising activities and schedule
- Engage marketing earlier in the conversation
- Identify existing marketing work that can be re-purposed
- Be realistic about needs and timelines
- Articulate impact to fundraising results

For Marketing

- Talk to development before establishing calendar
- Help find solutions
- Listen to the fundraising experts
- Message testing with donors, sponsors, and participants
- Understand budget implications of changes
- Margin

Case Study:



Wishes *in* Flight®



- New campaign
- Making the case
- Bringing to life
- Tracking & wrap-up

TOP 3 LESSONS

Conflicting Objectives: Tools to Use



- Project Charter
- Kick-off meetings
- Integrated job descriptions
- Project-specific team engagement
- Team culture
- Project team recognition
- Project dashboard

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With Chapter Staff and Volunteers:



- Make it simple
 - What do you want people to do?
 - How will you help them get it done?
- Make it visual
- Make it matter locally
- Add some fun and internal incentives
- Build and use peer groups and task forces





Managing Turn-over



median
DEVELOPMENT DIRECTOR
VACANCY

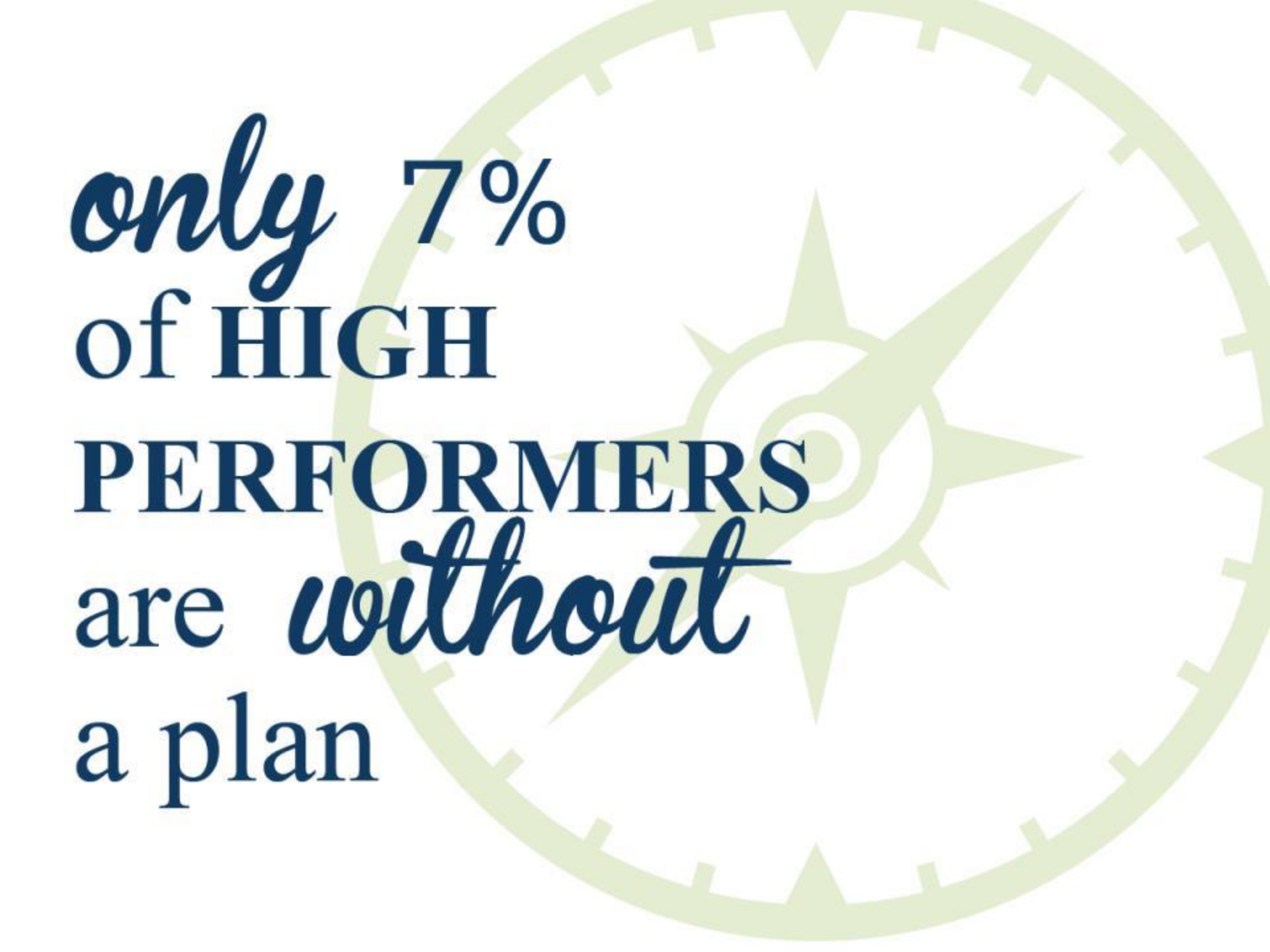


50% *of* DEVELOPMENT DIRECTORS
≡ *anticipate*



LEAVING THEIR
CURRENT JOB IN
2 YEARS

or less



only 7%
of **HIGH**
PERFORMERS
are *without*
a plan



21%
have NO

fundraising database

**17% OF EXECUTIVE DIRECTORS
REPORTED THAT THEIR BOARDS
HAVE NO INVOLVEMENT IN
FUNDRAISING AT ALL**





89% of Development Directors reported LITTLE or MODERATE INFLUENCE on engagement of other staff in fund development or annual budgeting

Among high performing organizations, 61% of Development Directors report having A LOT OF INFLUENCE





2 out of 5

RESPONDENTS REPORTED HAVING
no culture of philanthropy AT
THEIR ORGANIZATION

90% *do not*
HAVE A FORMAL
STRATEGY
FOR
RETAINING
STAFF



over
the
past 3
years

29%



37%

Organizations
HIRING NEW
STAFF to support
new programs or
initiatives
HAS RISEN
because of an
increased
awareness among
leaders that STAFF
HAS REACHED
CAPACITY

Most entry-level vacancies filled
by candidates from
OUTSIDE THE NONPROFIT SECTOR,
which means an
increase in training
is necessary.



THIRTY SEVEN
PERCENT



have a telecommuting
or virtual work policy

OVER 2/3 DO NOT HAVE A



FOR SENIOR LEADERSHIP

Managing Turn-over



- Bring people of similar positions together in-person 1-2x year
- Build a staff class and facilitate on-going meetings
- Develop a mentor program
- Work with your HR managers during the hiring process and make it more collaborative
- Offer career development opportunities
- Outline possible career paths
- Create a 'Welcome Package'
- NO BURN-OUT
- Succession planning
- MISSION!

Turn-over: Not Me!



- Share your career goals
- Be your own best champion and advocate
- Volunteer for collaborative projects
- Know your impact
- Get involved in your organization's mission in a way that is meaningful to you

Virtual Teams

CONFERENCE CALL				
B	I	N	G	O
Can someone call ____		Let's start a committee for that	Can you repeat that?	Who just joined the call?
Talk to IT	Let me try to dial back in		We need to be mission focused	
Oops, my mute button was pressed	Update the website		Can you hear me?	Are you there?
	Budget	Are you there yet?		That's really 3rd party fundraising
You're breaking up...		Talk to Marketing	Hello? Hello? Hello?!	Sorry, my phone dropped the call

Conference Call ...in Real Life



<http://www.break.com/video/video-a-conference-call-played-out-in-real-life-2567235>

Virtual Teams

For Managers

- Hold regular team calls
- Encourage calls and conversations across the team with and without direct manager
- Develop project opportunities for 'time in fox hole'
- Host face-to-face meetings (minimum 2/year)
- Include scheduled 'no work time' for bonding
- Send care packages (during busy seasons)
- Google hangouts

Virtual Teams

For Staff

- If you aren't already, be prepared to be on the phone - A LOT
- Over communicate
 - Share your challenges/successes
 - Seek forms of interaction (w/ local chapter, local mission related, visits w/ home office, etc.)
- Seek some face-to-face time with your team (live or video)

Key Takeaways

- Embrace it!
- Connect and build relationships
- Use Project Charters
- Be clear, concise and upfront about expectations
- Golden Rule
- Know your impact

72 Hour Challenge





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