Tune Up Your Organization
Part 2: Create a unified team and increase the effectiveness of your board
Tune Up Your Organization

What we will cover today:
Creating a unified team
- Effective internal communications
- People management
- Hiring the right people

Building an effective board of directors
- Clear expectations
- Getting the board involved in fundraising

Coming up next week
Powering Your Journey
- Raising needed funds
- Increasing public engagement
Do you feel that your team is unified?
- Most of the time we are unified
- Sometimes we are, sometimes not
- Rarely
- Not sure or not applicable
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Creating a Unified Team

Strong Internal Communications

Simple decision-making guidelines

Distill the organization’s mission and goals into easy to remember statements that guide team members in making the most appropriate decision

Our four priorities to guide decision-making:

• Create lifesaving solutions for the animals.
• Involve the community in our work.
• Deliver quality customer service.
• Provide excellent care to the animals.
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Creating a Unified Team

Strong Internal Communications

Well-run meetings that include two-way dialogue

- Management team (weekly or every other week, one hour max)
- Stand-up team meetings (weekly or twice weekly, 15 minutes max)
- All-staff meetings (twice a year, one hour max)
- Supervisor one-on-one meetings with direct reports (monthly or more often, 20 to 30 minutes)

(Tips for better meetings in Part One)
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Creating a Unified Team

Strong Internal Communications

One Good Thing

Each person (or a representative of each department) starts off the meeting by briefly sharing one good thing that happened that week

- Helps everyone learn about the role each department/person plays in overall success
- Sets positive tone
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Creating a Unified Team

Strong Internal Communications

Communication Tools

Find one that works well for your team

- Tech: Teams, Trello, Asana
- Low-tech: Posters, white boards, email, binder with updates and sign-off sheets
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Creating a Unified Team

Strong Internal Communications

Customer Service Guide

• Customer service standards and expectations
• How to respond to common questions
• Where to direct calls and emails
• Where to get help, answers to questions
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Creating a Unified Team

Strong Internal Communications

Organizational Attire

• Logo shirts
• Designated colors
• Sensible dress code for safety and professional appearance
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Morale boosters

• Managers serve staff breakfast or lunch

• Department contests (holiday tree decorating, Halloween costumes)

• Bingo games for teams

• Birthday cards, thank you notes, celebrating work milestones

• Create a “Wow Wall”
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Morale boosters

• Training opportunities, attending conferences and professional development opportunities
• Rewards for hitting a goal—pizza party or food truck day
• Confidential surveys to get staff input
• Staff picks to promote harder to place pets
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Morale boosters

- Making goals visible, tracking progress, celebrating each success
- Achieving great things together and talking about it
- Leader pointing out how each role contributes to successes
- Activities, such as making toys for the animals or tie-dying t-shirts for a promotion
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Morale boosters

• Employee recognition that includes peers
• Online Kudos or Cheers for Peers
• Design your own program (we can send a sample)
People Management

Recognize the good works of team members. Be sure it’s in the way the individual wishes to be recognized.

“Follow the ‘Platinum Rule.’ Treat others the way they want to be treated.”

– Mary-Frances Winters
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Personality Self-Assessment with Your Team

Golden Retriever

Chimpanzee

Fox

Lion
Personality Self-Assessment with Your Team
Which animal are you?

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- Golden Retriever: Pace: Slow, Priority: Relationships
- Fox: Pace: Slow, Priority: Tasks
- Chimpanzee: Pace: Fast, Priority: Relationships
- Lion: Pace: Fast, Priority: Tasks

Indirect - Open - Direct
Self-contained
Based on what you know so far, which animal do you think best represents your style?

- Golden retriever
- Chimpanzee
- Fox
- Lion
- Not sure
People Management
You get more of what you reward

Sometimes we unintentionally reinforce behaviors we do not wish to reward

Address people problems promptly

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People Management
Creating a culture of accountability

- Walk the talk
- Define results, expectations
- Gain commitment
- Be open to feedback
- Coach employees on how to be accountable
- Consequences and reinforcement
- Hold each other accountable
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Hiring the right person is one of the most important and challenging things we do.

“Get the right people on the bus and in the right seats and the wrong people off the bus.”
– James Collins

“You’re only as good as the people you hire.”
– Ray Kroc
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Job Descriptions help you hire the right person and manage performance

“If you know how to beg, we may have a position for you in Accounts Receivable.”
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Hiring the Right Person
Can Do, Will Do, Fit

• Can the person do the job?
• Will the person do the job?
• Will the person fit into our organization and this role?
Can Do Factors
- Work Experience
- Education
- Technical Skills
- Analytical Skills
- Communication Skills
- Specialized Training

Will Do Factors
- Motivations
- Interests
- Goals
- Drive/Energy
- Reliability/Stability

Fit Factors
- Team Orientation
- Independence
- Social Effectiveness
- Interpersonal Style
- Stress Tolerance
- Limitations
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Hiring the Right Person

Interviews for Leadership Roles

Three phases for important jobs

• 30-minute phone screening
• One-hour video conference interview
• In-person interviews
  – Supervisor (board or chief exec.)
  – Peers or staff
  – Time outside of formal interview setting
When you interview job candidates, do you ask questions that get them talking about specific past situations/experiences and how they handled them?

- Yes
- Sometimes
- No or not usually
- Not sure or not applicable
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Hiring the Right Person

Effective Interviewing

Past behavior is the most reliable indicator of future behavior

Develop questions that will reveal how they have handled things in the past
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Hiring the Right Person

Sample Questions

- Can you share an example of how you _____ from your past?
- Share an experience where ____. How did you deal with it? What were the result?
- Give us a few examples of your experience with...?
- What were the factors you considered and what did you decide? How did it work out?

“Where do you see yourself five lives from now.”
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Hiring the Right Person

Listen more than you talk
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Hiring the Right Person
What to look for in a candidate

- Energy, drive, enthusiasm
- Customer service orientation
- Strong communication, interpersonal skills
- Attitude of continuous improvement
- Animal welfare experience may not be crucial
- Management skills, creates clear expectations, accountability
- Decision-making – timely efficient
- Fundraising, relationship building
- Budgeting, growth opportunities not just cost cutting
Questions to ask references:

• In what capacity did you work with this person? How long?
• How would you characterize your experience working with this person?
• What positive impact has this person had on the organization?
• What was challenging for this person and how did they overcome these challenges?
• Anything else you would like to share?
• Would you hire or work with them again? Why or why not?
Onboarding new staff – more than policies, paperwork, and forms

Hiring the Right Person

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- Mission and goals
- Safety and animal handling training
- Introductions
- Facility tour
- Hands-on training with mentor
- Check-ins to see how things are going
Create Your Road Map

Quick Poll

Do you feel that your board of directors is effective?

- Yes, most of the time
- Sometimes
- Rarely
- Not sure or not applicable
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Building an Effective Board of Directors

Stanford University survey of non-profit board members:

• 27%—colleagues lack understanding of organization’s mission and strategy

• Over 50%—colleagues lack understanding of their own roles and responsibilities
What is the role of the Board of Directors?

As an organization grows, the role of the board evolves.

Governance Board? Working Board?

As an organization grows, the role of the board evolves.
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What every board member should know

• Mission, goals and key strategies
• Board members’ role and requirements:
  – Legal: “Duty of care, loyalty, good faith”
  – Your group’s requirements
• Bylaws and major policies
• Annual operating budget and financial status
• Fundraising plan
• Key statistics: animals helped
• Essential programs
• Key messaging
<table>
<thead>
<tr>
<th>Board = Governance</th>
<th>Staff = Management</th>
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<tbody>
<tr>
<td>Select, support, evaluate ED</td>
<td>Run the organization</td>
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<td>Keep board informed</td>
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<td>Seek their counsel</td>
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<td>Make major decisions</td>
<td>Provide accurate, complete info</td>
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<td>Current best practices</td>
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<td>Approve high-level goals/policies</td>
<td>Recommend goals, policies</td>
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<td>Manage the organization</td>
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<td>Oversee organizational performance</td>
<td>Provide timely info</td>
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<td>Candor and responsiveness</td>
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<td>Fundraise Ambassadors/Advocates</td>
<td>Create &amp; work development plan</td>
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<td>Leverage board connections</td>
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<td>Provide training/support</td>
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<td>Ensure legal, financial, ethical integrity</td>
<td>Sound business practices</td>
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<td>Compliance and transparency</td>
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<td>Timely and accurate info</td>
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<td>Build a competent board</td>
<td>Assist with recruitment, orientation</td>
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Prevent Problems

- Board member contract sets clear expectations including fundraising
- President holds board members accountable for fulfilling responsibilities
- Terms of office, Term limits

Problems?

- Peer-to-peer communication most effective
- Consider outside consultants or a self-assessment tool
- Increase board to include skilled, experienced board members
Develop an on-boarding process for new board members

- Clearly written expectations
  - Board member contract
  - Orientation package about organization
- Tour of the facility
- Time with the ED and President
- Answers to their questions

blueavocado.org
boardsource.org
Bulding an Effective Board of Director

Helping board members fundraise

- Clear expectations from the start
  - Making personal gifts
  - Participating in events/campaigns
- Engaging with donors at events
- Accompanying the ED for donor meetings
- Handwritten thank yous to donors
- Making connections
- Soliciting auction items, prizes
- Community speaking engagements
- Sharing on social media and via email
- Thank-a-thon calls
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Review: Strategies to Tune Up Your Organization

Create a unified team
- Effective internal communications
- People management
- Hiring the right people

Build an effective board
- Clear expectations
- Getting the board involved in fundraising

“Anything which is not managed deteriorates.”

- Adage
You’ll learn how to:

- Raise the funds you need for your organization

**Powering Your Journey part two:**
How to increase public engagement with your organization to help you raise more funds.
Bonney Brown and Diane Blankenburg
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www.humanenetwork.org

This webinar is made possible by the Petco Foundation.
The Petco Foundation is creating a national lost and found database for pets. Learn more and join the initiative by visiting petcofoundation.org/lostpets
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