Pivoting Your Team to a Virtual Environment

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Who, What, Where and our Why

➢ Executive Searches (Interim Services), Organizational Management, Fund Raising, and Virtual Training

➢ Support Services in the areas of Executive Coaching, Marketing and Advertising, Grant Writing, Database Administration, Background Checks and Drug Screening, and Virtual Events.

➢ Over $75 million raised since 2014

➢ Over 75 nonprofit organizations "changed"

➢ Over 400 volunteer hours donated

➢ Over $40,000 in corporate support back into the community

Learning Objectives

By the end of this session, participants will be able to:

➢ Better define potential work systems to successfully manage a virtual teams.

➢ Establish how you will effectively communicate to ensure mission fulfillment.

➢ Assemble the components needed to create a culture of efficiency, productivity, and success that includes remote employees.

How has the pandemic affected your nonprofit?

1/3 NPOs had less than one (1) month of cash before the crisis and we're already a month into this

2/3 of NPOs indicated they were facing crisis just weeks into this

Challenges with Staff and Volunteer Availability

Reduced Govt., Private, and Earned Funding

Unable to provide essential services

NFF Survey

Significant changes in demand

Cancelled revenue-generating programing

Destabilizing Conditions

Define Your Work System

Invest in the right tools and software for your virtual team:

1. **Instant Messenger**: <u>Skype</u> or <u>Slack</u> can help promote a sense of community and team building and gives teammates a quick informal way to communicate.
2. **Screen Capture**: Capture Tools like <u>TechSmith</u> or <u>Evernote Web Clipper</u> enable you to share what you're looking at when someone can't look over your desk or computer screen.
3. **Cloud file sharing**: <u>Dropbox</u> or <u>Google Drive</u> gives access to documents and files, anytime and anywhere. Larger organizations may use a specific platform developed specifically for use. <u>Adaptive Planning</u> provides accounting and management of donors, special events, social media and volunteers.
4. **Collaboration Software**: <u>Asana</u> or <u>ClickUp</u> facilitate task planning and execution.
5. **Training Platforms**: <u>Go To Meeting/Webinar</u>, <u>Microsoft Teams</u>, or <u>Webex</u> provide a more secure environment
6. **Visual Workflows**: <u>Gantt charts</u> or <u>Kanban Boards</u> can align the workflow visually for teams.

Establish How You Will Communicate

Internal Audiences: Board & Staff

- Focus everyone on the priorities and guidelines on frequency
- Transform culture and practice
- Increases confidence in management
- Appropriate uses for informal communications: Instant Messenger, Virtual Conferencing
- Appropriate use for formal communications: Email, Phone, Virtual Conferencing

External Audiences: Funders and Partners

- Demonstrates need and context
- Supports reporting and compliance
- Increases confidence in management
- Appropriate uses: Phone, Mail, Email (if preferred), and Virtual Conferencing

Creating the Culture

- Build trust by clearly communicating desired outcomes or deliverables, identification of a champion, the timeframe for completion, and provide the necessary resources
- Boost productivity through project time tracking
- Update position descriptions
- Invest in skills, abilities or knowledge

Incremental Changes

20th century

Structure: Bureaucratic, multi-leveled and managed by senior level

Systems: Distribute performance data to Exec. level only, offer training and support to senior level only, depend on few performance information systems

Culture: Inwardly focused, centralized, slow to make decisions, political and risk adverse

21st century

Structure: Fewer rules, limited levels of management and lower-level employees will manage

Systems: Distribute data widely, offer training and support to many people, depends on performance information systems

Culture: Externally focused, empowering, quick to make decisions, open and candid, more risk tolerant

Questions?

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