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SURVIVE

How to Run a Sustainable Team without LOSING YOUR MIND

Wendy Austin, Elise Cronin-Hurley
Amanda Little & Joyce Walters

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Wendy
AUSTIN
Culture Building

Elise
CRONIN-HURLEY
Team Organization

Amanda
LITTLE
Team Organization

Joyce
WALTERS
Finance & Fundraising

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Continuity and Sustainability

Organizational Continuity (Surviving)

The leadership, talent, insights, and flexible strategies necessary to rise to your unique challenges.

Organizational Sustainability (Thriving)

The processes, procedures, decisions and activities to ensure that an organization can continue to function through an operational interruption.

You might not be the first leader of your team,
but you shouldn't be the last!

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Goals of this presentation…

- Tips and tricks to building a more sustainable team
- Meeting your goals
- Making your team life easier and increase individual satisfaction.
- Have more fun!

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Every team is different

Unique elements of people, organizations and culture

- Robot
- Students
- Contacts
- Finances, Fundraising & grant
- Communications
- Scheduling
- Advisory committees
- Day to day activities
- Community activities
- Sponsors
- Parent involvement
- School/youth organization
- Multiple teams under one umbrella.
- Teacher/community team

Customize the process to address your specific team & culture needs.

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Some possible team buckets

Administration

- Charter, Handbook & Bylaws
- Membership
- Facilities

Team Organization

- File Management
- Contacts & passwords
- Logos & Branding
- Outreach

Finance

- Money Collection
- FIRST Account
- Fundraising

Communications

- Email
- Online Meeting Tools
- Internal Communication
- Website & Social Media

Competition & Travel

- Travel Plans
- Pit
- Initiatives
- Awards

Whys

- Team Culture
- Strategic planning

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Each Team has its Own Set of Buckets

Decide what buckets your team needs to work on. Then brainstorm ideas to help achieve those bucket goals.

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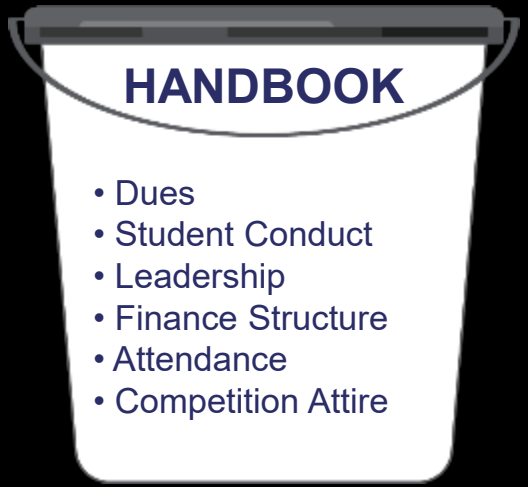
So your Worksheet might look something like this…



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Understand your specific circumstances

- Available budget
- Rules & Restrictions
- Leadership
- Accessibility
- Features
- Oversight

Team Administration

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Establishing Expectations

Tools can set clear expectations and boundaries for all.

- Charter or Club Form
- Strategic Planning
- Handbooks
- Calendars

Should be reviewed each year to ensure the team is in agreement and on target.

Underappreciated Critical Information

Key contact information of sponsors, partners, community leaders, FIRST support in your area (Regional Directors and Senior Mentors)

Vendors (Robot parts, shirts, temporary tattoos, etc.)

Official Team logos, fonts, colors, and images.

Official *FIRST* and season logos and colors.

Facilities Maintenance & Emergency Contacts

Passwords!

A notebook and shared spreadsheet

Team organization documentation

- **Charter or Club Form (official acknowledgement of organization)**
- **Handbook**
  - What to expect: calendar, contacts, structure, finances, etc.
  - Expectations: commitments, code of conduct, etc.
- **Bylaws**
  - rules that are so important they cannot (and should not) be changed easily.

Handbook

- FIRST Robotics Competition Team Management Resources
  https://www.firstinspires.org/resource-library/frc/team-management-resources
- FIRST Robotics Competition Team Handbook Guidelines
  https://www.firstinspires.org/sites/default/files/uploads/resource_library/frc/team-resources/frc-team-handbook.pdf
- The Compass Alliance Team Organization
  https://www.firstinspires.org/sites/default/files/uploads/resource_library/frc/team-resources/tca/tca-team-organization.pdf
- Search for FRC Team Handbooks for a variety of examples
  Eg. Team 1816 https://edinarobotics.com/resources/#Organization-Resources

Team Organization

Implement with Online Tools

Slack/Microsoft Teams/Discord
Closed Communication Tools

Google Hangouts/Zoom/ Microsoft Meetings
Online Meeting Tools

Google Drive/One Drive/Dropbox
File management and sharing of key documents and projects.

File Management

- Create an index of folders for overview
- Use table of contents feature
- Include name of creator, date created in footer of document
- Create document standards to make communication of information clear and simple.
- Your buckets list can be used as both a handbook table of contents and your file management hierarchial structure.

Imagery & Branding Assets

- Official Team logos, fonts, colors, and images.
- Standards for communicating your message.
- Official *FIRST* and season logos and colors.
- Where to find assets and information.
    - Location of your specific information
    - https://www.firstinspires.org/brand
- For more information on Branding for *FIRST* Teams, check out: https://explodingbacon.com/resources/big-bacon-theory/
- Assets documentation tool.

Team Financials

FIRST Account

- Your *FIRST* Account is a team account held with *FIRST*
- Donations can be sent to *FIRST* on your behalf
  (most large companies do this directly)
- Where Can you find it?
  - on your dashboard (Team Leaders Coach 1 & 2 are the only ones with access)
- Can you access it after the season is over?
  - If you end up with money left over in your FIRST Robotics Competition team account, there is a procedure within FIRST to get the funding to your team's business account. You MUST follow the FIRST guideline for the regrant. - Must have an FEIN # and apply to receive by the deadline. https://www.firstinspires.org/robotics/regranting-process-procedures-and-w-9

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What does my team need to know about finances to Survive:

- What rules do you work within?
- What is your financial status? Do you have a 501(c)(3)?
- Are all assets passed through & owned by a school?
- What tax laws are you subject to?
- What about sales & donations?
- What is the difference between restricted and unrestricted funding?
- What are your team assets?

Document your assets.

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What are your Team Assets

- Checking and/or Savings Bank Accounts, CDs?
- *FIRST* Account
- Who has access to these accounts?
- Are assets passed through & owned by an affiliate?
- Who owns your equipment?

Document your assets.

Banking & Finances

When was the last time you heard…
“Oh I left my checkbook at home. Can I bring it next time?”

Having an online financial option these days ensures you can easily collect fees in the moment for memberships, meetings, and products.

Reduce the collection time.

This should be connected to an organization cloud-based email that can be shared with the next group of officers. Never a personal email account.

Many Options to chose from:

- PayPal
- Square
- Zelle

Budgets & Finance tools

Can be as simple as a spreadsheet or you may find something like Quickbooks is more appropriate for your needs.

Educate your members on your financial policies

- Receipts
- EIN numbers
- What is and is not Tax Deductible
- What is and is not a team expense
- What are member's expense responsibilities

Checks and Balances

For *FIRST* Robotics, *FIRST* Tech Challenge, and *FIRST* LEGO League Teams, as a Leader you will want to have a financial check and balances system in place.

Team Lead may be on the bank accounts and act as a signatory.

Treasurer keeps records of all transaction and reporting.

- Treasurer works with all involved with the team organization structure and writes the checks or purchase orders but can not sign checks. A separate person needs to execute.

Transparency within the organization.

Reporting income and expenses regularly to the team.

Teams Organizational Structure Example:
- Team Lead/President
- Vice-Lead/President
- Secretary/Historian
- Treasurer

Team
Competition & Travel

All things related to competing… except the robot

- **Travel Guide & Parent/Student Meeting**
  - Food
  - Transportation
  - Hotels
- **Awards**
  - Documentation (judge's packet, brochure)
  - Submissions
- **Pit set-up & planning**
- **Scheduling**

Internal & External Team Communications

Digital Media Management

- Establish Best Practices: expectations and guidelines
- Document all passwords with access by at least two (2) trusted mentors.
- Multiple mentors monitoring all assets for safe content and interactions.
- Having numerous admins not only provides for continuity of maintenance and oversight, but also means less fatigue.
- Understand the purpose/benefit of each platform for your team
- Features
- Accessibility
- Restrictions

Organizational Email

Critical applications should be tied to organizational email accounts and shared with multiple officers.

- Financial
- Digital media assets
- Membership
- Website contact forms

Never a personal account.

Some Considerations

How many emails do we need?
e.g. a separate treasurer account?

Minimum of 2 people access to monitor and manage activities.

Privacy and security, your specific restrictions require.

Gmail is a popular option, but there are numerous options these days.

Major Benefit: year to year your leadership will have access to the history of critical information.

Basic Website Assets

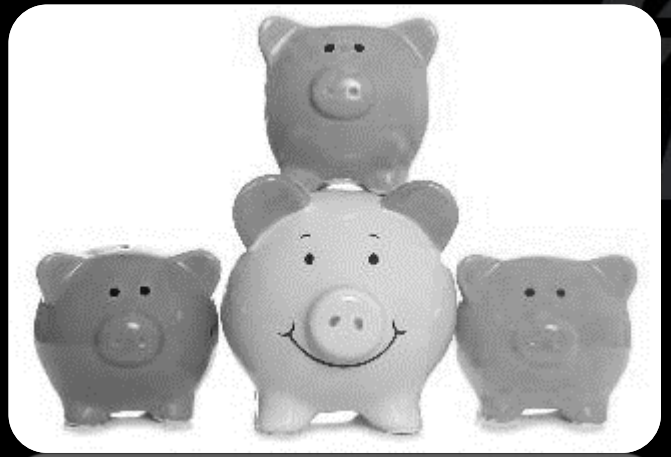
Some of these may be bundled together depending on your website set up.

- **Domain Name:** myteam.org
- **Hosting company.** Where your website files are hosted.
- **Website. The actual content of your website.**
- **Website ADA Compliance**
  https://www.ada.gov/resources/web-guidance/

Social Media

- Facebook Page/Group: assign page roles –must have a Facebook account to have a role.
- Twitter: share login with several trusted members
- Instagram: share login with several trusted members
- Linkedin: assign page roles –must have a user account to have a role.
- Tik-Tok

Communications Plan



Clear guidelines and expectations.

Include a list of your team's digital assets?

Is access student friendly?

Is there proper supervision/assigned mentors?

Multiple students and mentors involved will ensures sustainability of delivery to your audiences.

Link to FIRSTinspires.org and your regional and/or state *FIRST* websites to help audiences find answers quicker.

Can take time to get your entire group onboard. Be patient.

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Documentation & Communication Benefits

ACTION	PROVIDES	RESULTS
Structure and documentation	Expectations and boundaries	Succeed together Weather conflicts
Open communications	Transparency of management and financial activities.	Accountability Integrity Trust
Multiple trusted members	Productivity, Effectiveness, & Continuity	Sustainability Less stress

- .

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What bucket or bucket item(s) do you need to address this year?

Firm Foundation in *FIRST* Culture

https://www.firstinspires.org/about/vision-and-mission

- Gracious Professionalism
- The FIRST Core Values
- The Vision and Mission Statement

https://www.firstinspires.org/about/diversityinclusion

- Diversity
- Equity
- Inclusion
- Accessibility

Wrap Up!

- This is not meant to be a complete list of all matters of concern to your organization.
- Brainstorm with your members to address the issues specific to your team and work together to determine how to best manage.
- You are not likely to the first to experience a given issue. Search online for teams with similar challenges and creative solutions.
- Reach out to your FIRST Regional Directors and Senior Mentors when you aren't sure of something.

Your mission matters!

QUESTIONS

Thank you for joining us!

For more in-depth information, bookmark:

FIRSTMentorLife.com

FIRST Mentor Life

THRIVE

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So your Worksheet might look something like this…

Some possible team buckets

Business Plan

- Mission/Vision
- SWOT
- Goals
- Strategic Planning

Outreach

- Partnerships
- Training
- Local FIRST Outreach support

Fundraising

- Partnerships
- Student Involvement
- Fundraising

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Why build your team culture?

- Save time & money
- Spark creative ideas to innovate and improve
- Make actionable decisions
- Identifying opportunities
- Create a more flexible and responsive team
- Maximize your impact
- Contributes to sustainability of the team

What is your team culture

Who are you?

- What are your team values?
- Are your team expectations clear?
- What are your team's stories?
- How do your members view the team?
- Are you elastic or resistant to change?
- What does your onboarding process look like for student, mentors and families?
- How is transparent is your team's leadership with the members?

Team
Business Plan

Lay the Groundwork

Mission/Vision

SWOT analysis

Goals & Objectives

Budget

The strategic planning process puts the responsibility of defining, planning and implementing on the students to build a culture of self-reliant team members who will train the future of your team.

Mission & Vision

TODAY

Mission statement

What drives your Team?

Mission statement questions look like:

- What do we do?
- Whom do we serve?
- How do we serve them?

TOMMOROW

Vision statement

What gives your team direction?

What you want to become?

It's aspirational.

Vision statement questions look like:

- What are our hopes and dreams?
- What problem are we solving for the greater good?
- Who and what are we inspiring to change?

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Conduct a SWOT Analysis

INTERNAL to the Team	EXTERNAL to the Team
Strengths	Opportunities
Weaknesses	Threats

Goals, Objectives to build a Foundation

- 1/3/5 goals
- 3 objectives for how to hit those goals
- Business Plan & Sustainability
- Repeat each year

Strategic Planning or Annual Meeting

- **Inclusive meetings with students and mentors.** Can be helpful to have breakout sessions for each for some discussions.
- **Determine your team mission, statement, vision statement, goals, and objectives.**
- **Brainstorm ideas.**
- **Follow up meetings to reflect and evaluate what you have accomplished provides opportunities to create next steps and redirect as needed.**
- **Getting started worksheet**

Team
Outeach

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Types of Outreach

Sponsor Outreach

Building and maintaining relationships with your sponsors

Community Outreach

Promoting FIRST and STEM within your communities

FIRST Outreach

FIRST Teams at all levels can support *FIRST* local community outreach

Building Partnerships

- *The first ask* of partners and potential sponsors is always for mentors.
- Invested mentors/parents can provide opportunities for buy-in, which can lead to investment and give you an advocate for future sponsorships
- How can you leverage your network?
  - Two contacts to ask
- Who isn't involved with the organization?
  - Local restaurants?
  - Community foundations?
  - Large companies?

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Outreach Tips

- Build relationships first, money later.
- Don’t read PowerPoint presentation content
- Kid’s facing the flow of traffic at events
- Help your students identify their story
- Elevator speeches
- *Outreach prepares students for judges and future interviews*

Ever Evolving Training

- Identify your most challenging areas on the team.
- Adults and Students: Train your replacement.
- Focus training during the off-season, so it flows more naturally during the busy build and competition season.
- A veteran senior’s job is not to rule the world but to train their replacements.

Internal & External Team Fundraising

Fundraising

Build on those partnerships

- Grants
- Families
- Local Business
- Local Organizations
- Government entities

Getting the students involved

- Student Treasurer
- Setting the Budget
- Fundraising & Grant writing

Fundraising

- Know where you can look:
  - https://www.firstinspires.org/robotics/team-grants
  - https://www.firstinspires.org/robotics/team-grants-faq
  - https://www.firstinspires.org/resource-library/fundraising-toolkit
- Most Importantly
DOCUMENT & SAVE!

Impact

What is the result of what you are doing?

- Establish timelines & expectations.
- Consider the size of your team and resources available
- Identify areas the team members would like to address
- Brainstorm
- Create living documents that change as circumstances and new awareness evolve

This is a Learning Process

- **You will experience new circumstances.**
  - Events
  - Personalities & Stakeholders
  - Budget
- **You will see patterns develop.**
- **Modify your plan**
- **Adapt for maximum success.**

Tap into Your Resources

Some of the people already connected to your team may already have tools available to help you work smarter!

- Mentors
- Sponsors
- Partners
- Parents
- Alumni

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