



Laissez les bons temp rouler: Building your “dream team”

Julie Naranjo Upham, CFRE

Taylor McMillan



Beads & Bling, it's a Mardi Gras thing!

- Build, Include, Execute
- Finding your keys to leadership
- All about the donors



My Mardi Krewe

- Importance of New Perspectives (Hiring for “fit”?)
- Onboarding for the long haul
- Trust & Transparency
- Planning for the future
- Samples: Hiring Matrix & 30-60-90 Plan



Discussion #1

- What has been a key ingredient on your team that has helped it be successful?



Reflection #1

- What do you wish you had known coming into your current role?



All the Floats in the Parade

- Natural Partners
- Defining roles
- Inclusive Decision Making Culture
- Executive and Volunteer Partnership
- Sample: Relationship Teams Definitions



Discussion #2

- What are some ways that you include executives in training and fundraising?



Reflection #2

- Think of 2-3 Natural Partners who are good with your donors, why?



Leave a Little Sparkle Wherever You Go

- The Why – having your plan
- The What – key ingredients for your plan
- The How – regular discussions and reviews
- Be willing to change course
- Samples: Account Plans



Discussion #3

- When have you used regular planning activities to plan for donor activities?



Reflection #3

- How many of your donors have clear donors plans?



Everywhere else it's just a Tuesday

- Learn from every leader
- Defined roles moves the team forward
- Clear and communicated plans
- Document, document, document
- Celebrate wins!



Questions?



Thank you!

Julie Naranjo Upham, CFRE – jupham@conservation.org

Taylor McMillan – taylor.mcmillan@nmss.org