

# 2021 TEAM COALITION STRATEGIC PLAN



# FY 2021 TRAINING COMMITTEE PROJECTS



■ On track      ■ Future deliverable  
■ May be delayed  
■ Off track      COMPLETED PROJECTS

	MAR	APR	MAY	JUN	JUL	AUG	SEP
<a href="#">Develop collegiate content</a>	Develop Toolkit	Sales Strategy		New Product Ready to Sell			Goal: 20 Schools
<a href="#">Ensure training is competitively priced</a>			Regional, State & Local Programs				
<a href="#">Enhance training product – in-person and online</a>	Hybrid Training Option	FY22 Budget Requests to BOD		Special Needs Accommodation			
<a href="#">Develop e-commerce for training products</a>				Trainer/ Professor Payments	Bartender (Unaffiliated) Payments		Evaluate Ecommerce Usage
<a href="#">Provide access to data and subject matter experts</a>		Plan in Development					
<a href="#">Develop partnerships with state certification agencies</a>	Connect with 1 <sup>st</sup> tier states	Budget application fees	Connect with 2 <sup>nd</sup> Tier States			Connect w/ Remaining States	
<a href="#">Ensure TEAM trainers are the best of the best</a>	Review Current MT Requirements		Recruitment & Accountability		Brief MTs on training database enhancements		Ensure all MTs meet requirements
<a href="#">Maximize training revenue</a>		Non-Member Incentive					Launch starter kit, non-member incentives
<a href="#">Manage promotional assets</a>	1 <sup>st</sup> MT Videos			Distribute MT Videos			

# FY 2021 TRAINING COMPLETED PROJECTS



[Students certified in pilots for collegiate content](#)

[Student payments through ecommerce for training products](#)

[Maximize training revenue – Covid discount](#)

[Manage promotional assets- Training menu website updates](#)

# FY 2021 MARCOMM COMMITTEE PROJECTS



- On track
- May be delayed
- Off track

■ Future deliverable

COMPLETED PROJECTS

	APR	MAY	JUN	JUL	AUG	SEP
<a href="#">Engage in industry conversations</a>				Quarterly Report		
<a href="#">Develop mutually beneficial partnerships</a>	Committee Review			Implement Goals		Review Goals
<a href="#">Provide sponsorship support services</a>	Committee Review	Share with BOD	Membership Votes			Implement Fees in FY22
<a href="#">Reimagine fan engagement offerings and activities</a>	FY22 Budget Requests to BOD; Special Project Brainstorm	Special Project to BOD	Special Project to Membership			
<a href="#">Manage monthly newsletter</a>	4/12/21 Q2 Report	5/10/21	6/16/21	7/12/21 Q3 Report	8/9/21	9/13/21

# FY 2021 MARCOM COMPLETED PROJECTS



[Improve TEAM's website and social media](#)

[Develop, manage brand standards](#)

[Enhance media relations](#)

[Manage value proposition assets](#)

# FY 2021 MEMBERSHIP COMMITTEE PROJECTS



- On track
- May be delayed
- Off track

■ Future deliverable

COMPLETED PROJECTS

	MAR	APR	MAY	JUN	JUL	AUG	SEP
<u>Engage members</u>	Membership Dues Invoices	Committee Surveys		Membership Meeting			
<u>Recruit new members</u>			Establish Targets		Intros to 5 targets		Q4 Progress Report
<u>Reimagine fan engagement offerings and activities</u>	Best Practices	FY22 Budget Requests to BOD; Special Project Brainstorm	Special Project to BOD	Special Project to Membership			
<u>Provide fan engagement consultation services</u>	Develop Toolkit	Post content on website					

# FY 2021 MEMBERSHIP COMPLETED PROJECTS



[Clarify membership offering](#)

[Manage membership recruitment assets](#)

[Manage value proposition assets](#)

# FY 2021 GOVERNANCE & FINANCE COMMITTEE PROJECTS



■ On track      ■ Future deliverable  
■ May be delayed  
■ Off track      [COMPLETED PROJECTS](#)

	MAR	APR	MAY	JUN	JUL	AUG	SEP
<a href="#">Maintain clear expectations</a>	Board Orientation						
<a href="#">Cultivate culture of feedback</a>		Committee Surveys		Survey Results			ED Performance Review
<a href="#">Recruit strategically</a>	Identify Director-at-Large candidates	BOD Survey		Survey Results			
<a href="#">Budget includes input from stakeholders</a>		Committee Chairs Submit Budget Requests	BOD Review	Membership Vote			
<a href="#">Budgetary performance monitored and addressed</a>		Quarterly Review		Quarterly Review			
<a href="#">Maintain active committees</a>		Quarterly Review		Quarterly Review			



# FY 2021 GOVFIN COMPLETED PROJECTS



[Maintain clear expectations](#)

[Recruit strategically](#)

# AWARENESS OBJECTIVES



**TEAM IS A STRONG  
BRAND**

**TEAM IS A "GO-TO"  
RESOURCE FOR  
MEDIA AND  
INDUSTRY**

# AWARENESS OBJECTIVES

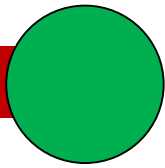


- On track
- May be delayed
- Off track

■ Future deliverable

COMPLETED PROJECTS

	APR	MAY	JUN	JUL	AUG	SEP
<u>Improve TEAM's website and social media</u>	Quarterly Report, Graphic Designer SOW Complete			Quarterly Report		
<u>Develop, manage brand standards</u>		Draft Media Kit		Final Media Kit		Update with FY21 Info
<u>Enhance media relations</u>	Finalize Kit			Quarterly Report		
<u>Engage in industry conversations</u>				Quarterly Report		



## Website Improvements – Complete!

- Audit website and make recommendations
- Add more images, less text
  - [Committees](#)
  - [Training menu and all sub-menu pages](#)
- Report website traffic, functionality quarterly
- Update website monthly at a minimum

### Milestones

April	July	October
Quarterly website traffic report, Strategy32 scope of work complete	Quarterly website traffic report	Quarterly website traffic report
Complete	Not Started	Not Started

### Project Owners

- TEAM lead - Liz



### Key Stakeholders

- Executive Director
- Strategy32 + Graphic Designer (donated by Constellation Brands)
- Board of Directors

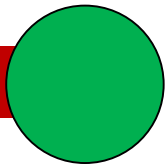
### Notes

Constellation Brands has donated the services of Strategy32 (Suzanne McGovern) and her graphic designer for design support

### Next Steps

Quarterly traffic reports





## Establish and Enforce Brand Standards

- Logo use
- Responsibility Has Its Rewards use
- Font
- PPT deck template
- One-pager template
- Audit internal and external communications annually

### Project Owners

- TEAM lead - Liz



### Key Stakeholders

- Executive Director
- Strategy32 + Graphic Designer (donated by Constellation Brands)
- Board of Directors

### Milestones

**February      March      June      July      September**

TEAM Staff updates current brand standard assets with Strategy32	Committee provides feedback and edits are made by S32	TEAM Brand standards are put into a media kit	Media Kit approved and added to website	Updates to kit with new fiscal year information
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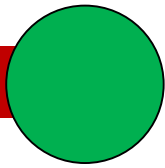
Complete      Complete      Complete      Complete      Not Started

### Notes

Constellation Brands has donated the services of Strategy32 (Suzanne McGovern) and her graphic designer for design support

### Next Steps





## Enhance Media Relations

- Develop media relations engagement plan – in dropbox
- Report progress at biannual membership meetings
- Press release templates – in dropbox
  - RHIR winners
  - New member
  - Response to incident of negative behavior

### Project Owners

- TEAM lead - Liz



### Key Stakeholders

- Executive Director
- Graphic Designer
- Board of Directors

### Milestones

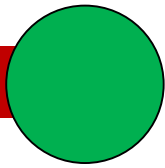
February	March	April	September
Committee Reviews messages and provides insight/feedback on plans for media engagement	TEAM implements feedback and creates a schedule/outline for media engagement & PR templates	Final plan & schedule is reviewed by committee and put in place; final PR edits are made	Metrics of plan are reviewed & updates are made; Committee reviews templates are still up to date
Complete	Complete	Complete	Not Started

### Notes

Subcommittee reviews engagement plan materials  
<http://bit.ly/TEAMMarComm>

### Next Steps





## Engage in Industry Conversations

- Establish list of events/programs where TEAM should participate – in dropbox
- List of important industry conferences/speaking engagements
- TEAM provides at least 1 meeting (virtual or in-person) for sports/entertainment industry members

### Milestones

February

March

June

September

TEAM Staff lead creates document with past engagements

Committee reviews list and shares other opportunities for engagement

Complete

Complete

### Project Owners

- TEAM lead – Liz



- Secondary



### Key Stakeholders

- Executive Director
- Master Trainers
- Facility Senior Managers
- Board of Directors

### Notes

<http://bit.ly/TEAMMarComm>

### Next Steps



# FISCAL STABILITY OBJECTIVES



Training is known in the industry as ‘the gold standard.’

TEAM has a strong value proposition for members.

TEAM is an expert in fan engagement.



# TRAINING IS KNOWN IN THE INDUSTRY AS “THE GOLD STANDARD”



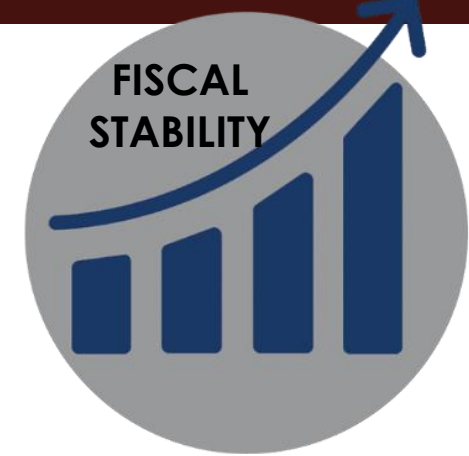
- On track
- May be delayed
- Off track

■ Future deliverable

COMPLETED PROJECTS

	MAR	APR	MAY	JUN	JUL	AUG	SEP
<u>Develop collegiate content</u>	Develop Toolkit	Sales Strategy		New Product Ready to Sell			Goal: 20 Schools
<u>Ensure training is competitively priced</u>			Regional, State & Local Programs				
<u>Enhance training product – in-person and online</u>	Hybrid Training Option	FY22 Budget Requests to BOD		Special Needs Accommodation			
<u>Develop ecommerce for training products</u>				Trainer/ Professor Payments	Bartender (Unaffiliated) Payments		Evaluate Ecommerce Usage
<u>Develop partnerships with state certification agencies</u>		Budget application fees	Connect with 2 <sup>nd</sup> Tier States			Connect w/ Remaining States	
<u>Ensure TEAM trainers are the best of the best</u>	Connect with 1 <sup>st</sup> tier states		Recruitment & Accountability		Brief MTs on training database enhancements		Ensure all MTs meet requirements
<u>Maximize training revenue</u>	Review Current MT Requirements	Non-Member Incentive					Launch starter kit, non-member incentives
<u>Manage promotional assets</u>	1 <sup>st</sup> MT Videos			Distribute MT Videos			

# TEAM HAS A STRONG VALUE PROPOSITION FOR MEMBERS



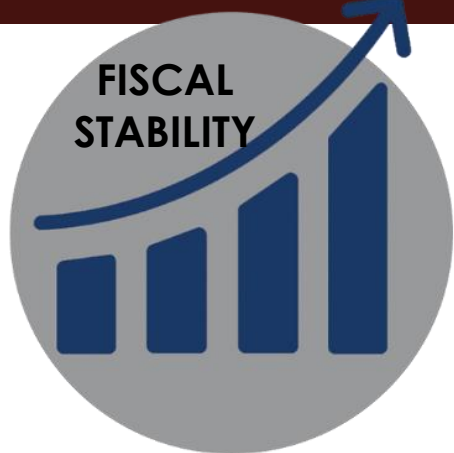
- On track
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- Off track

■ Future deliverable

COMPLETED PROJECTS

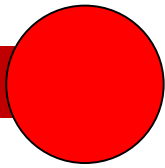
	MAR	APR	MAY	JUN	JUL	AUG	SEP
<a href="#">Clarify membership offering</a>	Membership Benefits	Finalize Tier Proposal	Share with BOD	Members Vote on Tiers			
<a href="#">Manage membership recruitment assets</a>	Finalize docs	Post assets on website					
<a href="#">Engage members</a>		Committee Surveys		Membership Meeting			
<a href="#">Provide access to data and subject matter experts</a>		Plan in Development					
<a href="#">Recruit new members</a>			Establish Targets		Intros to 5 targets		Q4 Progress Report
<a href="#">Develop mutually beneficial partnerships</a>	Develop Goals	Committee Review			Implement Goals		Review Goals
<a href="#">Manage monthly newsletter</a>	3/8/21	4/12/21 Q2 Report	5/10/21	6/16/21	7/12/21 Q3 Report	8/9/21	9/13/21

# TEAM IS AN EXPERT IN FAN ENGAGEMENT



■ On track      ■ Future deliverable  
■ May be delayed  
■ Off track      COMPLETED PROJECTS

	MAR	APR	MAY	JUN	JUL	AUG	SEP
<u>Reimagine fan engagement offerings and activities</u>	Best Practices	Special Project Brainstorm	Special Project to BOD	Special Project to Membership			
<u>Provide fan engagement consultation services</u>	Develop Toolkits	Post content on website					
<u>Provide sponsorship support services</u>	Outline for Fees	Committee Review	Share with BOD	Membership Votes			Implement Fees in FY22



## Collegiate Program

- Research demands through outreach to colleges
- Set pricing
- Develop content
- Market program
- Track sales, feedback
- Enhance program based on feedback
- Leverage member experience and knowledge

### Milestones

March	May	July	September
Finalize toolkit; update MTs; develop sales tools	Outreach to schools; review pilot feedback	Continue outreach	Goals: <ul style="list-style-type: none"> <li>• 10 - 20 schools implement</li> <li>• \$15,000 new revenue</li> </ul>
Delayed	Complete	Not Started	Not Started

### Project Owners

- TEAM lead - Brandon



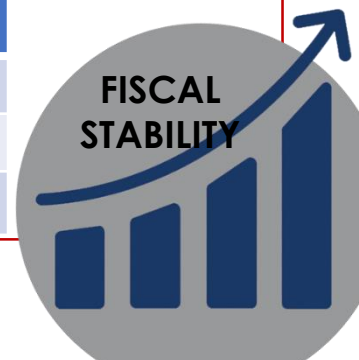
### Key Stakeholders

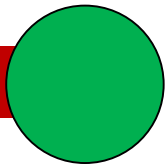
- Master Trainers
- Executive Director
- Sub-committee – sports management professors
- Board of Directors

### Notes

- Clear/Concise Process - Easy to use & implement
- **Schools participating:**
  - Johnson & Wales
  - Lynn University
  - Saint Leo University
  - University of Mary – UT Martin

	\$500	\$600	\$750
Toolkit (\$250)	✓	✓	✓
Online Set-up (\$250)	✓		✓
IDP (\$550)		✓	✓





### Price Comparison

- Research pricing for comparable, national programs in alcohol management training – in dropbox
- Chart price comparison

### Project Owners

- TEAM lead - Brandon



### Key Stakeholders

- Master Trainers
- Executive Director
- Board of Directors

### Milestones

January	May	August
TIPs & ServeSafe Price Comparison	Add regional, state & local programs to comparison	Present to membership
Complete	Complete	In progress

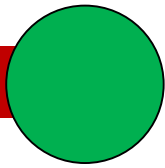
### Notes

Key Doc: Alternatives to TEAM Training  
<http://bit.ly/TEAMTrainingComm>

### Next Steps

Add regional, state and local programs to price comparison





## Enhance Training Product – In-Person/Online

- Update training introduction video
- Make enhancements to online employee training
- Hybrid training option – face to face training + Brainshark for certification test
- Address special needs
- Modifications for participants with disabilities
- Add presentation customization to IDP agenda

### Project Owners

- TEAM lead - Brandon



### Key Stakeholders

- Master Trainers
- Executive Director
- Board of Directors

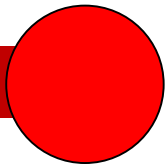
### Milestones

February	March	June	July	September
Make Online Training adjustments	IDP agenda updates; Hybrid training option;	Accommodations for special needs; Track usage for OT including retakes	Identify Intro video logistics	Plan to update intro video
Complete	Complete	Delayed	In Progress	Not Started

### Notes

### Next Steps





## E-Commerce for Training Products

- Online payment for IDP registration
- [Online payment for students participating in collegiate program](#)
- Online payment for starter kit bundle – delayed until after FY ends;
- Covid-Relief discount in place through 9/30/21 (10% discount on \$3,000 spent, 20% discount on \$5,000 spent)
- Online payment for Level 1 or Level 2 employee certification unaffiliated with account or facility

### Project Owners

- TEAM lead - Brandon



### Key Stakeholders

- Master Trainers
- Executive Director
- Chief Operations Expert
- Board of Directors
- Glimmernet

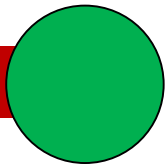
### Milestones

February	April	June	July	September
Student payments	Launch new training database	Trainer/ Professor payments for multiple products	Launch Bartender (unaffiliated) payments	Evaluate E-Commerce usage
Complete	Complete	Delayed	In progress	Not Started

### Notes

### Next Steps





## Connect with State Enforcement Agencies

- Update state law sheets
- Ensure TEAM program is approved by all states that mandate training/certify providers
- Identify training requirements for each state

### Milestones

January	March	May	July	August	September
Training Requirements by state	Contact dark blue states; Determine application fees; <b>NY ATAP approved</b>	<b>CA RBS approved;</b>	WA, WI approval; Update state law sheets;	Contact grey states	<b>Goal:</b> Approved responsible training provider in all gold states
Complete	Complete	Complete	In Progress	In Progress	In Progress

### Project Owners

- TEAM lead - Brandon



### Key Stakeholders

- Master Trainers
- Executive Director
- Board of Directors

### Notes

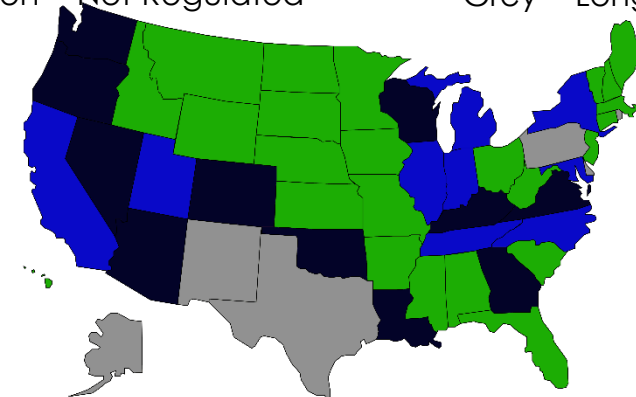
Key Doc: Training Requirements by State  
 State classification based on training requirements and current training usage in state

Blue = Approved

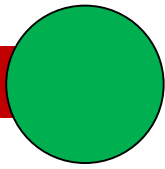
Green = Not Regulated

Dark Blue = Short term target

Grey = Long-term target







## TEAM Trainers Best of Best

- Review Master Trainer eligibility and accountability
- Enhance database with networking opportunities and best practice sharing

### Milestones

March	May	July	September
Review current MT requirements	Determine method for MT eligibility and accountability; List of database enhancements	Brief MTs on database enhancements	Ensure all MTs meet eligibility standards
Complete	Complete	In Progress	Not Started

### Project Owners

- TEAM lead - Brandon



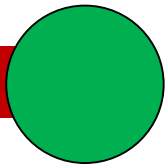
### Key Stakeholders

- Master Trainers
- Executive Director
- Board of Directors

### Notes

### Next Steps





## Maximize Training Revenue

- Covid-Relief discount: 10% discount on \$3,000 spend, 20% discount on \$5,000 spend
- Bundle pricing – starter kit (delayed until after FY ends)
- Non-member package – annual, upfront investment (to start with new FY)

### Milestones

January	April	August	September
Launch Covid-Relief discount	Develop Non-member package	Analyze Covid Relief purchases	Launch non-member package; Launch bundle pricing for starter kit; Determine bundle options for the holidays
Complete	Delayed	In Progress	Not Started

### Project Owners

- TEAM lead - Brandon



### Key Stakeholders

- Master Trainers
- Executive Director
- Board of Directors

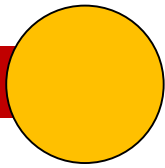
### Notes

**Goal:** 2,000 manuals + accesses to online training purchased per month  
 - 7/1 update = 6,562 manuals + 12,716 accesses = 19,278 / 18,000

**Goal:** 7.5 trainer certifications purchased per month  
 - 7/1 update = 91/67.5

**Key Document:** OrderInventoryAnalysis





## Manage Promotional Assets

- Training Fact Sheet – in dropbox
- Work Flow for new trainers
- [How to customize online training](#)
- Master Trainer videos for sales, FAQs

### Project Owners

- TEAM lead – Brandon



- Secondary



### Key Stakeholders

- Master Trainers
- Executive Director
- Board of Directors
- Comms & Marketing Chair

### Milestones

March	June	July	September
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Record MT videos; MarComm Committee makes updates to documents	Share MT videos; Promo assets ready to share		
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In progress	In progress		
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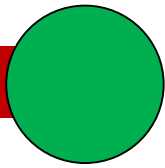
### Notes

<http://bit.ly/TEAMTrainingComm>

#### Key Questions:

1. What is TEAM training?
2. Why use TEAM training?
3. How does TEAM Training work?





# Clarify Membership Offerings

- [Clearly define membership benefits](#)
- Establish new tiers of membership

## Project Owners

- TEAM lead - Jill



## Key Stakeholders

- Executive Director
- Membership Committee
- Board of Directors
- Concessionaire members
- Alcohol members

## Milestones

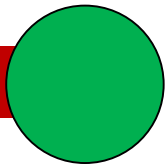
April	May	June	September
Finalize new tiers proposal	Share tiers with BOD	Membership vote on tiers	Roll out new tiers structure
Complete	Complete	Complete	In progress

## Notes

- Tiers incorporate current member investments in TEAM beyond dues – training products and consumer programs
- Concern is that current members will move to a lower tier
- <http://bit.ly/TEAMMembershipComm>

## Next Steps





# Manage Membership Recruitment Assets

- MOU for new members – in dropbox
- [Value proposition](#)
- [Membership benefits](#)

## Project Owners

- TEAM lead – Jill



- Secondary

## Key Stakeholders

- Executive Director
- Membership Committee
- Board of Directors
- MarComm Committee

## Milestones

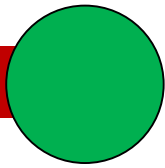
March	April	June	September
Finalize edits to assets	Make assets available on members only website		
Complete	Complete		

## Notes

- Marketing & Communications committee is the lead on value proposition assets
- <http://bit.ly/TEAMMembershipComm>

## Next Steps





## Engage Members

- Members only website – in development
- [Onboarding materials](#)
- Biannual membership meetings
  - June: vote on next FY budget; BOD & committee survey results
  - Dec: membership survey results
- Membership feedback loop – in dropbox
- Database of mission moments

### Milestones

March	April	May	June
Members only website, finalize edits to materials	Draft agenda for June membership meeting	Final agenda for June meeting	Run June membership meeting
Complete	Complete	Complete	Complete

### Project Owners

- TEAM lead - Jill



### Key Stakeholders

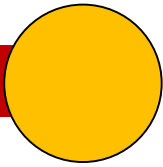
- Executive Director
- Membership Committee
- Board of Directors

### Notes

<http://bit.ly/TEAMMembershipComm>

### Next Steps





## Provide Access to Data, Subject Matter Experts

- Develop plan for data collection and analysis
- Develop and formalize list of subject matter experts and plan for maintenance of those relationships

### Milestones

March	April	May	June
SME list	Plan in development	Include at least 1 SME in June meeting agenda	
Delayed	Delayed	Not accomplished	

### Project Owners

- TEAM lead – Brandon



- Secondary



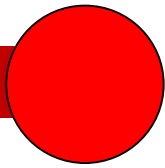
### Key Stakeholders

- Executive Director
- Training Committee
- Membership Committee
- Board of Directors

### Notes

### Next Steps





## Recruit New Members

- Engage membership in prospecting and recruitment efforts by asking for introductions to prospects
- Maintain living document of membership prospects with regularly updated information regarding recruitment process/actions
- Report progress toward membership goals at biannual membership meetings

### Milestones

May	July	September
Create prospects document	Introductions with 5 prospects	Report on progress
Delayed	Delayed	Not started

### Project Owners

- TEAM lead - Jill



### Key Stakeholders

- Executive Director
- Membership Committee
- Board of Directors

### Notes

### Next Steps





## Develop Mutually Beneficial Partnerships

- Develop annual outreach goals with each strategic partner
- Assign MarComm committee member as liaison to each strategic partner
- Establish and develop relationship with responsibility.org

### Project Owners

- TEAM lead – Liz



- Secondary



### Key Stakeholders

- Executive Director
- MarComm Committee
- Board of Directors
- Strategic Partners

### Milestones

**March      April      June      August      September**

Develop goals for each strategic partner and develop work plan	Committee Reviews and provides feedback on plan	Outreach goals are implemented		Review success of outreach goals
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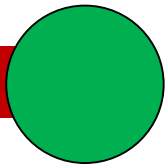
Completed      Complete      Delayed      Not started

### Notes

Outreach goals should be done annually in June

### Next Steps





## Manage Value Proposition Assets

- Value proposition
- TEAM At A Glance – in dropbox
- [About Membership on website](#)
- Road show deck – in dropbox

### Project Owners

- TEAM lead – Liz



- Secondary



### Key Stakeholders

- Executive Director
- MarComm Committee
- Membership Committee
- Board of Directors

### Milestones

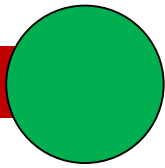
March	April	May	June
Edits are completed by TEAM staff lead and reviewed	Ongoing edits made as required	Ongoing edits made as required	
Complete	Complete	Complete	

### Notes

- Marketing & Communications committee is the lead on value proposition assets
- <http://bit.ly/TEAMMarComm>

### Next Steps





## Manage Monthly Newsletter

- Set annual newsletter schedule
- Produce monthly
- Send the week following each BOD meeting - COE
- Update poll results monthly
- Report on traffic quarterly

### Milestones

January	April	July	October
Annual schedule set	Quarterly newsletter traffic report	Quarterly newsletter traffic report	Quarterly newsletter traffic report
Complete	Complete	In Progress	Not Started

### Project Owners

- TEAM lead – Liz



### Key Stakeholders

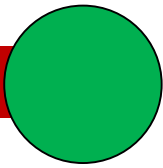
- Executive Director
- MarComm Committee
- Chief Operations Expert

### Notes

- Marketing & Communications committee is the lead on value proposition assets

### Next Steps





## Reimagine Fan Engagement Offerings

- Create menu of fan engagement services available, include ROI / cost-benefit analysis
- Develop best practices for fan engagement
- Refresh fan engagement assets
- Develop ideas for special projects that engage multiple (if not all) TEAM members and strategic partners
- Implement 1 special project annually

### Milestones

March	April	May	June
Best practices of fan engagement	Refresh assets, Special project brainstorm	Special project options to BOD	Special project options to membership
Complete	Complete	Complete	6/9/2021

### Project Owners

- TEAM lead – Jill



- Secondary



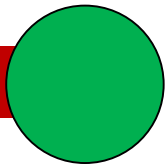
### Key Stakeholders

- Executive Director
- Membership Committee
- Board of Directors

### Notes

### Next Steps





## Provide Fan Engagement Consultation Services

- Create venue/sport-specific fan engagement toolkits for members (logos, contacts, sample materials, best practices)
- Maintain brand-specific fan engagement toolkits
- Venue alcohol service policies by league
- Maintain list of preferred vendors offering fan engagement solutions
  - DPMS for iPad/online data collection, digital souvenir photos
  - Landmark for inflatables
  - Sign language for autograph walls
  - VenueNext for in-app data collection

### Milestones

March                      May                      July                      September

Toolkits, venue alcohol policies

1-pager for Brown-Forman; Deck for Molson Coors

Complete

In Progress

### Project Owners

- TEAM lead – Jill



- Secondary

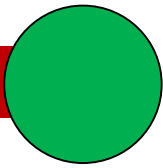
### Key Stakeholders

- Executive Director
- Membership Committee
- Board of Directors

### Notes

### Next Steps





## Provide Sponsorship Support Services

- Create fee for service model to manage existing responsible fan/designated driver programs already in place at sports/entertainment venues with a branded sponsor that is a member of TEAM Coalition
- Connect with brand teams
- Maximize sponsorships of existing responsible fan programs by sharing best practices with brand teams
- Report on most successful sponsored fan engagement activities at biannual meeting

### Milestones

March	May	June	September
Outlines for model fees created	Model presented to Board	Members vote to approve	Fee to be implemented at the start of new fiscal year
Complete	Complete	Complete	In Progress

### Project Owners

- TEAM lead – Liz



### Key Stakeholders

- Executive Director
- MarComm Committee
- Board of Directors

### Notes

### Next Steps



# GOVERNANCE OBJECTIVES



TEAM's board is engaged, comprised of influential individuals, and adequately prepared to represent TEAM Coalition's mission and membership

TEAM's financial oversight is process-oriented and effective.

TEAM has a strong committee structure

# FY 2021 GOVERNANCE & FINANCE OBJECTIVES



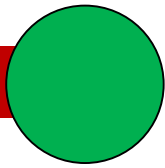
- On track
- May be delayed
- Off track

■ Future deliverable

COMPLETED PROJECTS

	MAR	APR	MAY	JUN	JUL	AUG	SEP
<u>Maintain clear expectations</u>	Board Orientation						
<u>Cultivate culture of feedback</u>		Committee Surveys		Survey Results			ED Performance Review
<u>Recruit strategically</u>	Identify Director-at-Large candidates	BOD Survey		Survey Results			
<u>Budget includes input from stakeholders</u>		Committee Chairs Submit Budget Requests	BOD Review	Membership Vote			
<u>Budgetary performance monitored and addressed</u>		Quarterly Review		Quarterly Review			
<u>Maintain active committees</u>		Quarterly Review		Quarterly Review			





## Maintain Clear Expectations

### Complete

- [Update bylaws](#)
- Define board member roles
- Board MOUs – in dropbox
- Board rubric – in dropbox
- ED performance goals – in dropbox

### In Progress

- [Board orientation](#)

## Milestones

March	June	September
Board orientation		
Complete		

## Project Owners

- TEAM lead – Christy



## Key Stakeholders

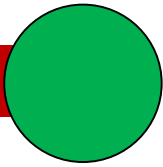
- Chief Operations Expert
- Executive Director
- GovFin Committee

## Notes

MOUs are in <http://bit.ly/TEAMGovFinComm>  
 Board rubric and ED Performance Goals are in <http://bit.ly/TEAMBODfiles>

## Next Steps





## Culture of Feedback

### Complete

- Utilize consent agendas
- Treasurer shares financial standing monthly
- File management system for important documents - dropbox
- Committee chairs report monthly
- Board self-evaluation survey – approved version in dropbox
- ED evaluation – approved version in dropbox

### Milestones

April	June	September
Board self- eval survey shared	Survey results shared	ED evaluation
Complete	Complete	

### Project Owners

- TEAM lead – Christy



### Key Stakeholders

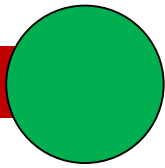
- Chief Operations Expert
- Executive Director
- GovFin Committee
- Treasurer

### Notes

<http://bit.ly/TEAMBODfiles>

### Next Steps





## Recruit Strategically

- Ask board members to submit lists of board prospects
- Treasurer shares financial standing monthly
- Board self-eval/engagement survey annually – in dropbox
- Board reviews survey results, recommends changes
- Maintain all important organizational documents securely online
- ED performance review – in dropbox

## Project Owners

- TEAM lead – Christy



## Key Stakeholders

- Chief Operations Expert
- Executive Director
- GovFin Committee

## Milestones

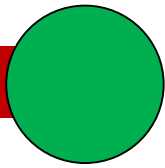
April	May	June	September
Board survey shared	Board survey data collection	Board survey results shared	ED review
Complete	Complete	Complete	Not started

## Notes

<http://bit.ly/TEAMBODfiles>

## Next Steps





## Budget Includes Input from Stakeholders

- Committee chairs provide budget requests for next fiscal year
- GovFin creates next FY budget
- Board approves next FY budget
- Membership votes to approve next FY budget

### Project Owners

- TEAM lead – Christy



### Key Stakeholders

- Chief Operations Expert
- Executive Director
- GovFin Committee
- Treasurer
- Committee chairs

### Milestones

#### April

- Committee chairs submit budget requests to GovFin
- GovFin develops next FY budget

Complete

#### May

- Board reviews budget and approves it for membership review
- Membership receives next FY budget for review

Complete

#### June

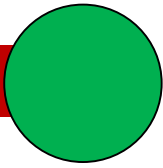
Membership votes to approve next FY budget at membership meeting

Complete

### Notes

### Next Steps





## Budgetary Performance Monitored, Addressed

- GovFin updates financials monthly
- Treasurer presents financial review to the board monthly
- Revenue expectations adjusted according to training sales, membership dues collection

### Project Owners

- TEAM lead – Christy



### Key Stakeholders

- Chief Operations Expert
- Executive Director
- Treasurer

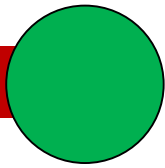
### Milestones

March	April	May	June	July	Aug	Sept
Monthly Financial review	Mid-FY budget to actual comparison	Monthly Financial review	Monthly Financial review	FY Q3 budget to actual comparison	Monthly Financial review	FY year-end budget to actual comparison
Complete	Complete	Complete	Complete	In Progress	Not started	Not started

### Notes

### Next Steps





### Maintain Active Committees

- Training, MarComm and Membership committees meet monthly
- Agendas, minutes are maintained and available in drop box folders
- Strategic plan doc is updated monthly
- Projects and goals are on track
- Greater than 50% of member orgs are represented on committees

### Project Owners

- TEAM lead – Christy



### Key Stakeholders

- Chief Operations Expert
- Committee Chairs
- Committee Liaisons

### Milestones

April	June	October
Mid-FY strategic plan review	FY Q3 strategic plan review	FY year-end strategic plan review
Complete	Complete	In progress

### Notes

Empty notes box

### Next Steps

Empty next steps box

