



for every child

## PROSPECT DEVELOPMENT TEAM – STANDARDS OF COLLABORATION

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1. **Weekly feedback:** All team members will provide 360 feedback based on UUSA Values, the standards herein, StrengthsFinder, etc. Team members may feel more comfortable offering feedback to their managers in an established feedback structure: What should your manager keep doing, start doing, or stop doing to empower your success?
2. **Ask for what you want, settle for what you need:** Consider yourself a negotiator in all aspects of your work. Start high and then consider what you truly need to achieve expected results. Be thoughtful in designing the outcomes you desire and consult your leadership on the appropriate approach.
3. **Assume good intent:** No one goes out of their way to make our lives miserable. Assume all colleagues mean well and may not fully understand the reality of their ask. When colleagues make truly unreasonable demands, we need to explain why the ask is unreasonable.
4. **Start with yes:** There is a difference between “impossible” and “resource improbable.” When faced with requests that straddle that line, don’t assume the former. Instead of saying no, we present options by outlining tradeoffs. Let our partners decide when those options point to no.
5. **No heroic measures:** Impeding work-life balance to deliver the impossible makes impossible the expectation. Occasional emergencies arise that truly merit a 10-hour workday, but let’s not allow colleagues or ourselves to create crises. Stay calm, embrace gratitude; you are not on fire.
6. **Vent or Solve:** Listeners can ask a speaker whether they want to “vent or solve?” This helps the listener understand whether they are a sympathetic ear or a solutions partner. Culturally within PD, team members get one vent per problem, or else it automatically becomes a solve.
7. **There are no stupid questions:** We should always question each other in constructive ways to arrive at clarity and solutions. Yet “because we’ve always done it that way,” is the only wrong answer.
8. **Make new mistakes:** Perfection is neither a possibility nor an expectation. Progress requires us to try new things, which means we’ll make new mistakes regularly as we experiment. We can recover from our new mistakes, learn and adapt from the experience, and make the next step a successful one. However, repeat mistakes are growth opportunities and need to be addressed concertedly.
9. **After three back-and-forth emails, pick up the phone:** Email can be an effective communication tool to convey simple messages quickly. However, email is often counterproductive to complex and empathetic communication. Especially with clients or direct reports/managers, pick the phone up early and often. A personal touch goes a long way.
10. **Empowered ownership:** When highlighting a challenge for your manager, do not expect that they will take your problem on and solve it for you. Instead, bring one or two solutions and get their guidance on proposed or alternate approaches. Own your role and serve as a leader from where you sit. Move forward with decisions where you can quickly and discreetly undo your choices with little effort.

11. **And when do you need that by?** Always specify a deadline, up, down, and across UUSA. Not sure what deadline to propose? Refer to #2.

## SUPERVISORS, SPECIFICALLY:

1. **Unexpressed expectations = premeditated frustrations:** Your team cannot measure up to expectations you have not articulated clearly. When you perceive a team member falling short of your expectations, start first with introspective questions about whether you were clear in your delegation.
2. **Focus on what you can uniquely do:** Using task relevant maturity, delegate anything you think a team member is capable of completing 70% as well as you.
3. **Invest in your team:** Use delegation as a growth technique to prepare team members for their next step and align projects with team member's annual and long-term goals. Identify stretch projects and roles and engage in a strategic dialogue about the team member's career goals at least once a year.
4. **Do not solve your direct reports' problems:** Do not micromanage out of fear that your team member will make a mistake. They are going to, as will you. And when they do, despite your micromanagement, you'll both be unhappy and you will have gotten nothing done yourself. We can fix mistakes; "fixing" intentional micromanagers is harder.
5. **Be thoughtful in your feedback:** Dedicate at least five minutes in weekly check-ins to 360 feedback. Schedule 10 minutes before each 1:1 to develop feedback and document it in a consistent format and drafting annual reviews will be a breeze.
6. **Use tells sparingly:** When fielding questions from team members, consider whether you can develop the individual's critical thinking skills. Assume a coaching mentality, helping the team member arrive at solutions without providing them directly. To prevent or correct substantive errors, tells are appropriate.
7. **Adapt to different learning styles:** Incorporate different techniques and approaches into how you impart knowledge and facilitate meetings.
8. **Be transparent in decision making:** For key decisions, illustrate your thought process, politics, solutions, strategy, etc. so the team is clear on the rationale, can better anticipate decisions in the future, and understand how decisions may impact their work and other colleagues.

## COMMUNICATION NORMS

We commit to being responsive and clear in our communication to advance each other's work. Ideally, we strive to:

- **Determine the right vehicle for communication.** Identify which platform is best for certain communications over others (email, Slack channel, Slack direct message, Zoom call). They all involve different levels of nonverbal and verbal communications that are important depending on what we are trying to share. If you are sending something related to a complex project, utilize the appropriate Slack channel (or make a new project channel if one does not yet exist). Do not use group direct messages for dense content that requires feedback as it is difficult to keep organized – use a team or project channel instead. If you are sending a one-off request, an email or direct Slack message might be best.
- **Acknowledge emails containing an ask within 24 hours.** Acknowledge means a short reply, such as: "Yes, can do," or "I'm swamped. I'll get back to you Friday." Additional best practices include:
  - Beginning email subject lines with "Response needed:", "By 12/2:", "Urgent", etc.
  - Seeking a same-day response? Slack direct message or mention the individual in the project channel using the @ symbol; we can't read every email or Slack channel each day! For urgent responses, try a second contact method (e.g., call, text message).
  - Use Outlook's Send Later feature to delay send until business hours or the recipient's next window of availability.

- **Acknowledge Slack mentions (@) containing an ask within 1 hour or your next window of availability.** Acknowledge means a short reply, such as: "Yes, can do," "I'm swamped. I'll get back to you Friday," or a thumbs-up. Additional best practices include:
  - Senders:
    - Check the recipient's Slack status to set your expectations for responsiveness. If needed, check their calendar for more detail about their daily schedule and availability.
    - Use Slack's Schedule Message features to delay send until business hours or the recipient's next window of availability.
    - Use the Remind feature in Slack to set reminders for individuals or channels to take action (e.g., to review a document by a certain date).
  - Recipients:
    - Use Slack's custom status feature to indicate your receptiveness (e.g., "focus time," "out to lunch," "do not disturb until...")
    - Use the Remind feature in Slack to set reminders for yourself to read and respond to messages or take action.
    - If you have a meeting-full day, please use a "slow to respond" automatic reply and set your Slack status appropriately.
- **Time off**
  - **Lindsey's expectation is that you do not check email and do not attend meetings.** UUSA needs you to recharge your batteries so you're your best self when you return. Use an out of office message that indicates who is covering your responsibilities and when you will return.
  - If you are unexpectedly taking leave (e.g., you caught a cold), please communicate with your manager. If you are well enough, handoff urgent deadlines or projects and cancel meetings. Your manager will let the rest of PD know via email or Slack.
- **Avoid jargon and define our terms.** Within PD and throughout UUSA, consider your audience and whether they will truly understand what "wealth screening," "prospect management," or "acknowledgment" mean. We work in a technical field; err on the side of defining your terms. Try to verbalize your line of thinking and use less jargon.