

# CHAPTER 1

## Leading in a Mission-Driven Context

It was June 17, 2003, 12:30 PM. I had no choice. I pulled my car over on a residential Houston street, threw down the driver's seat, and curled up for a catnap. In approximately sixty minutes, I'd be training fifty veteran educators on how to support rookie teachers over the summer. But right then, I needed to sleep. My backseat was packed to the brim with training materials and supplies hastily thrown into boxes. The address and directions for the training were scrawled on the back of an envelope. Oh, and did I mention I had another session scheduled for the very next day that I had not yet planned?

Now how did I get in this precarious predicament, you may ask? A dreadful combination of a new job, unclear roles and responsibilities, not enough sleep, poor delegation, and lack of preparation. I was an *un*-Together Leader, and I had hit a breaking point. And the stakes were high. We were preparing teachers to go in front of students. So on this day almost fifteen years ago, I made a vow to never, ever get myself into that kind of situation again.

Perhaps you empathize? You, too, may be trying to juggle the high volume of work and responsibility thrown at you every day. Maybe you have all your to-dos reasonably under control but wish you could be more planned ahead. Or maybe you're just exhausted and looking for a better way?

This book can work for you if you are a new manager. It can work for you if you've shifted careers from the corporate world into the nonprofit sector and you're thoroughly confused about the culture. Or maybe you've made the move from teaching to school or district leadership, or you've quickly realized your MBA was practical but didn't teach you how to prioritize in a world of limited resources. Or maybe you have been in your role for a few years and you realize that lack of Togetherness is holding you back from achieving your goals or securing a promotion. Perhaps you are trying to get your own mission-driven work off the ground. You may have unlimited vision and passion but require finer execution skills to make your

dream a reality. Regardless of who you are, let this book be your guide in managing your time, energy, people's work, meetings, projects, and stuff. If we leaders are not Together, we will not get the ambitious results we want for our organizations. But if we are Together (along with a few other things), big and meaningful change *can* happen.

Some of you may have read my first book, *The Together Teacher*, a guide for teachers and other folks who work on a fixed schedule in on-your-feet environments without much discretionary time. But now you're a leader, and you have a different challenge: choice. You get to *choose* how you use your time. It's wonderful and daunting all at once.

## **WHAT DO YOU MEAN BY MISSION-DRIVEN WORK?**

There are many, many books, blogs, apps, hacks, and more designed to boost your productivity and hone your time-management skills. This book is unique because it's designed for leaders in *mission-driven* settings who do their own work *and* manage the work of others. By mission driven, I simply mean anyone whose work ultimately serves the greater good. It doesn't have to be limited to nonprofit work, either. A mission-driven leader could be the person who oversees a community theater group, a Sunday school director, a chief financial officer of a housing organization, or a school principal.

So why is mission-driven work so different? In my work coaching leaders, I've seen mission-driven leaders face these specific challenges:

- The problems we are trying to eliminate (homelessness, poverty, and environmental concerns, just to name a few) or create solutions and innovations for are enormous, urgent, and critical.
- Our work is never ending. Resources are limited. We are often both managers *and* makers.
- Our goals can and should be ambitious. The volume of our work is intense.
- The emotional toll of our work cannot be understated. In any given week, leaders face tough conversations about apartment evictions, breaking up fights between students, or big layoffs.

It is no wonder that many mission-driven leaders are overwhelmed and ineffective and eventually burn out.

## **WHAT DO YOU MEAN BY TOGETHERNESS, ANYWAY?**

What does a Together Leader look like anyway? What is my definition of Togetherness? I'm *deliberately* not using the term *organized* because, well, just being organized is simply not enough for a busy leader with an important mission at stake. I see Togetherness as a

combination of prioritized, planned, efficient, organized, flexible, predictable, intentional, and reliable.

In the painful personal example that opened this book, a more Together Leader may have thought, “Maia knew the training for the veteran teachers was incredibly high stakes. Because she regularly reviewed her calendar three months in advance, she knew it was coming down the pike. Because it was a new training, she proactively scheduled a series of meetings with her deputy director to outline the objectives, create the activities, and design the practice in the month leading up to the training. Because Maia realized that the materials aspect of the workshop would be a huge crunch, she carefully delegated production to a summer intern and set several meetings to check on progress. The day before the training, she ran one more dress rehearsal; invited her deputy director to ask her the tough questions she anticipated would come up in the trainings; packed the materials in her car; printed out directions, a premade pacing guide, and a sheet to take questions and contact info; laid out her outfit; and got a good night’s sleep.” *That* leader would have been much more Together—and clearly would get to a better outcome, via planning, prioritizing, delegating, anticipating challenges, and operating efficiently.

Togetherness means being

- Prioritized
- Planned
- Efficient
- Organized
- Flexible
- Predictable
- Intentional
- Reliable

Of course, Togetherness is just *one* aspect of effective leadership. There are so many more facets of people management, such as setting vision, investing in others, leading with heart, designing strategy, marketing and selling ideas, and so on. There are tons of books, executive courses, and grad school syllabi that cover this stuff. This book, however, focuses on just one aspect of leadership, one I believe is often neglected or discounted. There are very few classes in high school, college, or graduate school that really teach you how to design and execute personal, team, and organization-wide systems to reach your goals. As you head deeper into

the following chapter, you will find several self-assessments about your tools, routines, and mind-sets to help you determine your Togetherness strengths as well as where you may have some gaps.

## WHY TOGETHERNESS MATTERS EVEN MORE IN YOUR CONTEXT

I entered my first job as a nonprofit leader at Teach For America immediately after working as a classroom teacher—where I basically had *no* time. Teaching was an efficiency and prioritization game. But in my new role, everything was suddenly about choices: how to use my time, how to spend our limited money, and which staff to hire and when. With each new decision I was reminded of whose future was at stake. Yikes!

Togetherness is a means to an end. You can lead a strong organization without being completely Together. Many top-notch organizations do not subscribe to a culture of Togetherness and instead place strong value on turning on a dime, dropping everything to pursue an opportunity, and swooping in to flawlessly solve a crisis. I respect this. And a small percentage of people want this excitement on a daily basis for the rest of their lives.

The former chief talent officer in me would argue that this approach, though invigorating, will not build the teams and organizations we want over time. People get burnt out by late-night, never-ending meetings, and eventually even the most mission-dedicated individuals decide they want more time with their families. ***The Together Leader is about finding the right balance between systems and spontaneity so that you can meet all of your organization's goals—and have a life!***



### FAQ

**Can this book work for me if I am not a mission-driven leader?** I've grappled with this question myself, but the answer is yes. I actually believe everything in this book can be applied to any busy leader. Go for it!

On the flip side, it's also possible to be incredibly Together yet highly ineffective. I'm sure you have all met the color-coded colleague with her notebook always at the ready along with a specific set of pens and a very neat desk. But at the end of the year, she actually didn't accomplish any of her goals. This person often has a very mechanically clean calendar but doesn't always prioritize. She might get the next steps from meetings accomplished without issue but can't stop to reflect on if she is actually doing things that will ensure she reaches her goals.

Can you be effective without being Together? Yes, but only for a short period of time. Eventually your disorganization will catch up with you in *some* way, whether it's your team getting tired of operating in crisis mode, losing enough sleep that you get sick all the time, or your family forgetting what you look like.

The goal is to be Together *enough* to achieve your goals, do your job to the best of your ability, and enjoy your life. This can happen when you and your organization routinize all predictable work, make processes more efficient, and ruthlessly plan ahead. I want you to have more headspace to think innovatively and creatively, react smoothly to true emergencies, and minimize as much job-related stress and overwhelmedness as possible.

## **MY OWN TOGETHERNESS JOURNEY**

It all started with my button collection when I was two years old ... just kidding! In reality, I've been fortunate to work in leadership roles for several high-performing nonprofits and school districts. And I've served as a Together coach and trainer for organizations, traditional school districts, stand-alone charter schools, and more. I've directly coached leaders in start-up mode, those in rapid-growth mode, and veteran leaders trying to sustain systems. And my own Togetherness journey directly mirrors the way I decided to set up this book. Just as I had to learn to create and define systems for myself, systems for my teams, and then systems for my organizations, you will likely follow a similar path over the course of your career.

As I settled into my first nonprofit leadership role as an executive director at Teach For America, I needed to set a clear direction for my team. This helped me appreciate measurable goals, detailed plans to accomplish an ambitious set of objectives, and transparent roles and responsibilities.

After that, I oversaw a large summer teacher-preparation program that required me to manage an even larger team, this time spread out across the country. Together we learned about the value of managing our energy and ourselves to pull off a successful summer.

Following that, I took on an executive-level role in a growing charter school organization. Oh, and I got married and had two kids of my own. And so I really came to value organization-wide practices to support Togetherness—my organization and my family were rapidly scaling! Similar to you, I was interested in creating good in the world—and having a life.

## **WHY THIS BOOK IS DIFFERENT**

Lots of good resources already exist on time management and leadership. Check out my website, [www.thetogethergroup.com](http://www.thetogethergroup.com), for my ongoing list of favorite books, articles, and blogs. So why write (or read) another one? What's out there seems to split into two camps: the technical and the philosophical. On the technical side are outstanding titles such as *Getting Things Done* by David Allen and *Total Workday Control Using Microsoft Outlook* by Michael Linenberger. For those who want to focus on prioritization and the philosophy of leadership,

*The 7 Habits of Highly Effective People* and *First Things First*, both written by the dearly beloved Steven Covey, and *168 Hours* by Laura Vanderkam, are amazing. And I'm a big fan of *Your Best Just Got Better* by Jason Womack and *The Power of Habit* by Charles Duhigg for routines, habits, and efficiencies.

Yet none of these speaks directly to the unique challenges faced by leaders in mission-driven settings. Effective writing and training on Togetherness has to be practical—focused on tools and rituals—and neutral—applicable to anyone who leads people—whether in a school building, nonprofit, central office, or volunteer organization. I can't tell you what your goals or priorities should be, but I sure can help you achieve them by helping you ask the right questions, build the right tools, and develop the right rituals for yourself.

My work is rooted in this mind-set: *What is good is what works*. I draw best practices from many of the cited titles, but the bulk of my research and examples come directly from the thousands of workshop participants and many coaching clients I have been privileged to learn from in the past decade. I've been welcomed into high-performing nonprofits, strong school districts, advocacy organizations, and rural schools. And I've been fortunate enough to coach leaders of all levels directly in their own environments, which enables me to bear witness to every single emergency, interruption, and crisis that can throw off a well-planned day. You will see many of my past clients featured in this book. Quite deliberately, I have chosen people and organizations who get strong results but are not wild perfectionists.

One of my biggest observations is that the Togetherness journey is personal, specific to one's own habits, preferences, and organizational culture. I am not going to sell you a particular gadget, lock you into one specific app, or require you to purchase a certain planner. I'm remarkably indifferent about specific tools, but I'm a staunch believer in strong routines, planning, boundaries, and communication. And I'm going to really push you to ensure your goals are clear and your actions are aligned to meet them.

## **HOW THIS BOOK IS ORGANIZED**

*The Together Leader* is organized into five sections. It is designed to be read sequentially, though I invite you to pick and choose chapters based on your specific needs. In between sections, you will also find real-life examples of how organizations have put systems into action. And peppered throughout, you will find vignettes of real-life leaders facing common challenges. Last, scattered between chapters, you will get to read Togetherness Talks from real-life mission-driven leaders, most of whom still continue in their current capacities—though a few have moved on to new ventures. In the case of a job move, I chose to keep the position listed at the time of the sample for consistency. But everyone's samples are active and the real deal. In several cases, we created cleaner versions if there was an issue with readability or pared down a document so you could dive more deeply but know this

content is not invented! Almost all the tools and templates you'll see throughout the book can be found on my website, [www.thetogethergroup.com](http://www.thetogethergroup.com), using the passcode provided with the book. There you will also find additional samples, videos, and modifiable templates.

### **Section 1: Set the Stage**

These initial chapters set the stage for why productivity and time management in your unique, mission-driven context is so important. This section also helps you evaluate your current strengths and gaps as they relate to tools, routines, and mind-sets.

**Chapter 1:** Leading in a Mission-Driven Context: You are here! This chapter is designed to preview the what, why, and how of the book.

**Chapter 2:** Take Stock: Assess Your Togetherness Level: This chapter is full of quizzes and assessments to help you determine your current level of Togetherness and set your purpose for reading.

### **Section 2: Get Clear on Your Purpose**

This section places our focus on preparing for your course, taking a long view, and making sure your priorities are in order:

**Chapter 3:** Set Goals: Define the Direction: This chapter ensures your goals are in order, you have time to systematically review progress, and your organization has a predictable calendar.

**See It in Action:** Goal Setting Start to Finish: How an organization sets and reviews its goals.

**Chapter 4:** Break Down the Goals: Create a Priority Plan: This chapter helps you boil down your Yearly Goals into a three-month path of clear actions that in turn should drive your calendar and meetings!

**See It in Action:** Wrist, Elbow, and Shoulder: How a leader articulates what she cares most about in her team's work.

**Chapter 5:** Align Your Meetings: Make a Meeting Matrix: Because leaders spend a ton of time in meetings, this chapter is designed to test your meeting schedule against your priorities—and communicate to others accordingly.

### **Section 3: Get Yourself Together**

This section is designed to ensure your personal organization systems are securely Together! Even if you are already moderately Together, I recommend you spin through this section to confirm that your methods are airtight. You may also get some new ideas to tune up existing systems!

**Chapter 6: Get Macro: Design a Comprehensive Calendar:** In this chapter, I will take you through the development of a macro view of your calendar to ensure it reflects the priorities developed in the previous section.

**Chapter 7: Strategic Procrastination: Design a Later List:** The calendar cannot survive on its own! In this chapter, I help you capture all of the To-Dos related to your priorities—and consolidate all those other pesky To-Dos just running around!

**Chapter 8: Reconcile Your Time and To-Dos: Create Your Weekly Plan:** This chapter is where I get *really* specific, or micro, about your plan for the week.

**Chapter 9: Keep It Together: Routines and Checklists:** No tools work by themselves. They need care, love, and feeding. This chapter pushes you to set daily, weekly, and monthly rituals to keep Togetherness moving forward.

**Chapter 10: Hold That Thought: Save It for Later!** This chapter helps you separate your thoughts from your To-Dos so you can refer back to those good ideas in the future.

**See It in Action:** What Should I Carry? How a leader stays Together during a typical week—and what to carry!

#### **Section 4: Get Your Team and Organization Together**

This section describes the tools, systems, and routines necessary to function as a Together Team.

**Chapter 11: Keep E-mail in Its Place: Drowning in e-mail?** Is your team constantly ping-ponging each other all day long? Get clear on communications in this chapter.

**Chapter 12: Project Design, Planning, and Communication: More Than Just Spreadsheets!** Some projects call for more detailed plans that you can easily share with others, or you may manage someone who leads very detailed projects. If so, you'll find help here.

**Chapter 13: Become a Dynamic Duo: Maximize Your Assistant:** If you are fortunate to have some administrative or operational support, you will benefit from this chapter, which helps you make the most of this important partnership.

**See It in Action:** The Management Memo: Check out a Management Memo from a leader who clearly articulates expectations to his teams.

#### **Section 5: Put It All Together**

In the final section of the book, I discuss how to synthesize all of your new tools and systems.

**Chapter 14: Keep Track of Stuff, Space, and Knowledge:** The physical clutter cannot be overlooked, nor can all of those documents lie around. This chapter helps you control that chaos.



**Chapter 15:** Create a Culture of Togetherness: I will share ideas about how to infuse Togetherness into your entire organization—from hiring to evaluation.

**Chapter 16:** Conclusion: Keep It All Together: Now that we've tackled systems for self, team, and organization, let's keep ourselves honest as the rubber hits the road!

And peppered throughout the book are Common Challenges that I see leaders face on a daily basis, whether they're drowning in e-mail, shifting priorities, or moving to different organizations.

## HOW EACH CHAPTER IS ORGANIZED

Most chapters follow a predictable rhythm:

**Seen and Heard.** These quotes are directly from my workshop and webinar participants.

**Overview and Objectives.** The purpose of the tool and overview of objectives are given.

**The Model.** The models show the structure of each tool and share the thought process behind it.

**The Examples.** Each chapter includes two to three examples of actual tools from real-life leaders who use a variety of different products.

**Build Your Own.** These are step-by-step instructions on how to build your own tool, select the right product, and address common pitfalls.

**The Routine.** This section describes how to use your tool during the busy workday—and how to stay committed!

**Start Strong.** These are bullet points of how to quickly get started and a summary of the time commitment required.

## HOW TO USE THIS BOOK

First get your own systems up to snuff, as described in section 1 and section 2. After you feel super sharp, move to team systems, going slowly to accommodate your colleagues' habits, preferences, and appetites. To make the most of the resources in this book, you could also try the methods listed in the following sections.

### Independently with the Reader Reflection

I recommend downloading or printing out the Reader's Reflection Guide from my website, [www.thetogethergroup.com](http://www.thetogethergroup.com). Here you will find diagnostics, discussion and thinking questions, and bulleted summaries to wrap up each section. Tuck a printed copy inside the cover

of the book or keep a soft copy open on your desktop. If you complete the Reader Reflection as you review each chapter, I guarantee you will feel well equipped to tackle each aspect of Togetherness!

### **Accountability Partners**

You could also read this book with a partner on your team, in your organization, or even in another organization. Select a chapter per week, share answers from the Reader Reflection, and examine the corresponding samples on my website. Working together, you can take the self-assessments and quizzes, share artifacts, and brainstorm roll-out processes with your teams. You might even send each other drafts of your tools.

### **Improve Team Performance**

You could read this book as an entire team to see what concepts and rituals stick the most as a group. However, I do *not* recommend that you make portions of this book mandatory; that will quickly backfire on you in the form of quiet rebellion. In my experience, people get motivated to get it Together when they have a clear reason for digging in, such as increasing sustainability or better meeting their own goals.

Regardless of the approach you take to reading, I do recommend going into this book with some sort of clear plan of how you will digest, practice, and apply the tips and tools. Keep a list of ideas on a sticky note, a running document on your laptop, or in your Reader Reflection Guide. If you don't have a plan, you will walk away feeling overwhelmed—which is exactly what I *don't* want to happen!

## **NOTES ON TERMINOLOGY AND METHODOLOGY**

Finally, a word about terminology: I could have easily titled this book *The Together Manager* or *The Together Supervisor*. I just like the word *leader* best. It feels more all-encompassing of all that we do and everything we try to accomplish. Throughout the book, however, I will use the terms interchangeably. There are lots of articles about the fair and valid differences among the different job titles, but I'm not here to debate them. I'm here to help you manage the time you have to support a cause you believe in. Call yourself what you want, because *you* are in charge.

Similarly, I know there are many names for support staff, but I'm going to use *assistant* and let you translate that to your own context. And instead of using the technical term *direct reports*, I'm most often going to say *team members*. Last, although some of you work for nonprofits, schools, charter school management companies, religious institutions, school districts, and more, I'm going to use the blanket term *organization* instead of *company* or *district*.

This enables me to be as neutral as possible to meet your various needs. Everyone is working with a mission in mind.

In almost all cases, I'm using real people and real organizations who have agreed to open their calendars and habits to you. I'm sure there are many Together leaders and organizations not represented. I always love to gather new examples, so please do feel free to send them my way via my website. Not one of my featured people or organizations is perfect in every way. We all have areas to work on in our own Togetherness journeys. But every single person, team, and organization profiled here is putting forth a concerted effort to keeping Together to help meet professional and personal goals—whatever they may be.

## **TOGETHERNESS IS A MEANS TO AN END**

In case you cannot already tell, I'm a huge fan of clear expectations, organizational routines, and planning for the unexpected. This is *not* a book about being organized just to have a clean desk. This book is to help you feel and *be* more successful driving toward your mission—and maybe, just maybe, having a life along the way! This book is focused on helping you think about your own time—and your people's time—as a manager. This book is about developing tools, habits, and systems to effectively and efficiently lead a team. This book is about creating plans for expected work so we can deal with the unanticipated stuff when it inevitably arises. This book is the nuts and bolts of effective time management in a leadership role at a mission-driven organization: how to weigh the urgent call that comes through against the need to revamp staff orientation, how to plan purposefully for a meeting, and then follow up. This book is not about color-coding, alphabetizing, or creating perfect paper files. In fact, there will be multiple times I encourage messiness and improvisation.

Togetherness matters *more* in mission-driven work—and no one has taught it—until now!

## Togetherness Talks: Shawn Mangar



**Name:** Shawn Mangar

**Title:** Founding principal of Baychester Middle School (NYC Department of Education)

**Why Togetherness matters:** My workload is endless but my time isn't. Togetherness allows me to make the most of every minute.

**Tell me about the mission and scope of your work. What are you most proud of?**

My goal was to develop an organization that places the needs of students above all else while simultaneously providing staff with the best resources and opportunities to excel at one of the hardest jobs in the world. I'm proud of the fact that we've taken our student community service commitment from an ideal to a reality by ensuring every student has the opportunity to actively support the Bronx community with their advisory class each year.

**At 10 AM on any given workday, what might I find you doing?**

A typical day involves reigniting the best friend status of two middle students, providing instructional feedback to teachers, and planning or leading teacher training.

**What is your favorite Together Tool and why?**

I'm a huge fan of the software program Flow. It allows me to focus on my priorities, break down larger projects into bite-sized pieces, and monitor the deliverables of our team.

**Tell me how you start and end each day to remain Together.**

I begin every morning with a ten-minute meeting with my secretary, Elsa. We preview the day and discuss any tasks that need to get done. I end each workday with a fifteen-minute meeting with my codirector, Liz. We support each other by staying focused on the big rocks and holding ourselves accountable to our To-Do Lists for the next day or week.

**What is a challenge you still face with Togetherness?**

I'm addicted to e-mail and ESPN.com. I'm working on allocating specific time frames each day for checking e-mail and focusing on one task at a time without self-interruptions.

**How do you remain focused when the work is swirling around you?**

I often take a five-minute break and go interact with our students at recess or gym. This instantly

puts me in a better mood. Our students have the ability to motivate me without even knowing it. After time with them, I head back to my desk to write everything down and reprioritize as needed.

**What happens when you get interrupted or ambushed?**

In the moment, I tend to deal with the problem at hand. Afterwards, I like to take a step back and identify the organizational breakdown that led to the interruption and strategize about how I can prevent it from occurring in the future.

**It's 10 AM on a Saturday morning. What keeps you rejuvenated and renewed?**

Saturdays involve taking a spin class with my wife or playing Battleship with my nieces and nephew.

**What have you learned to let go?**

I've let go of organizing e-mails into specific file folders and ironing my school embroidered polo.