The Executive Director Planner Tool

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NMMS Revitalization Specialist in Promotion and Image Development

Julia Royal
NMMS Revitalization Specialist in Graphic Design & Marketing
Plan your work.

Work your plan.
Nothing makes me more productive than the last minute.
MainStreet Executive Directors juggle a LOT!

(and the struggle is REAL)
IDEA: is there a way to keep it “all” in one place?
January - March
Started with a rough draft of content

April - June
Design

July - December
Working Draft
One hour of planning can save you 10 hours of doing.
# Timeblocking 101

> Doesn’t have to be complicated

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> Start with one or two “chunks”
Manage your work...

Don’t let your work manage you!

up next: Julia
• Future Log/Year at a glance
• Quarterly Focuses (ETS, Priorites, Personal)
• Ideal Work Day & Daily Routines
• Monthly Calendar
• Monthly Dashboard
• Meetings (Executive, Board, Other)
• Weekly/Daily Planning Pages
• Annual Tasks Worksheets
  Service Request Tracker
  Grant Tracker
  Project/Activity Worksheet
  Event Worksheet
  Presentation Tracker
  Presentation Worksheet
  Site Visit/Annual Report Tracker
  Testimonials Tracker
  Acronym Glossary
- Zoomed out view
- Record things that aren’t happening in the current month.
Ideal Work Days & Daily Routines

- Things That Repeat
- Boundaries
- Personal Care Routines
“Your victory is right around the corner. Never give up.”
— Nicki Minaj

• Migrate from Future Log
• Daily Habits
• Monthly Priorities
• Quarterly/Annual Tasks
Monthly Dashboard

- Monthly Flex Space
- Notes
- Tasks
- Reminders
- Targeted
- Can be split

**REMINDER:**
It's a FLEX space; it can change and adapt to what YOU need!
Monthly Dashboard Ideas

- 4 Points Tasks
- Weekly Reminders
- Social Media Post Ideas
- Volunteer Tracker
- Potential Volunteers
- Potential Donors
- Expense Tracker
- Income Tracker
- Business Visits
- District Opportunities
- New Idea Tracker
- “Brain Dump”
- Personal Tasks
- Children Tracker
- Home Chores
- Specific Activity Tasks
- Memory Keeping
- Roundtable Notes
- Yearly Focus Progress
- Media Tracker
### Meetings

#### Executive Meeting

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**BEFORE THE MEETING:**

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**MEETING NOTES:**

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**NEXT MEETING DATE:**

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**FOLLOW-UP/TASKS:**

- [ ]
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### Meetings

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<tr>
<th>MEETING DATE/TIME:</th>
<th>FOLLOW-UP/TASKS:</th>
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**MEETING:**

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**MEETING NOTES:**

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**NEXT MEETING:**

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#### HIGHLIGHTS

- Executive
- Board
- Other Meetings

#### Before Meeting Tasks

- [ ]
- [ ]
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#### After Meeting Tasks

- [ ]
- [ ]
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- [ ]

#### Next Meeting Date

- [ ]
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Weekly/Daily Tasks

- Migrate Tasks from Monthly Calendar
- Try Timeblocking (or don’t)
- Routine Reminders
- “Next Week” Space
But where is all the color?
• How I use my planner
• Favorite Features
• Master the morning start up routine!

“Most of us spend too much time on what is urgent, and not enough time on what is important.”

— Steven Covey, 7 Habits of Highly Effective people
Making it fun
(items from Dollar Tree - washi tape, stickers, colored pens)

Ordered online from printme1.com

GRANT TRACKER

GRANT NAME/GRANTOR: Federal Home Loan Bank
PROJECT: Tucumcari Forge
APPLICATION DUE: June 30

KEY DEADLINES:

DATE: Sept 1, 2023 ITEM DUE: grant report due

NOTES: grant match of $4,000 received from TFSL

EXECUTIVE MEETING

MEETING DATE: 9/13/2022

FOLLOW-UP TASKS:

- Email CE. Committee
- agenda prep

up next: Elizabeth
**EXECUTIVE MEETING**

**BOARD MEETING**

<table>
<thead>
<tr>
<th>MEETING DATE:</th>
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**BEFORE THE MEETING:**

- [ ] Agenda
- [ ] Email
- [ ] Minutes
- [ ] Announcements

**FOLLOW-UP TASKS:**

- [ ] Financials
- [ ] Agenda
- [ ] Email
- [ ] Minutes
- [ ] 25th Anniversaries

**MEETING NOTES:**

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**BOARD MEETING**

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**NEXT MEETING DATE:**  
| MEETING TIME: |
Adding Personality :) 

- Try Monthly Themes
- Stickers
- Color-coding
- Washi Tapes
- Photos
- Printables
The expert in anything was once a beginner.
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<td>Noon - Eduardo visit</td>
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<td>Noon - Willis's visit</td>
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**DAILY HABITS**

Drink Water

Post to Social Media

Meditate

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**VOLUNTEER HOURS**

20

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The expert in anything was once a beginner.

- I definitely want to get the board together to discuss a possible retreat this month.
E.V. Design

- Check Epik's new business plan
- Follow up on Chan & Rico
- Applications update for Cityville Forge
- Redevelopment workshop

- Pick out paint colors
- Print plan at Staples
- Meet w/ Glide Cafe
- Call out

Visits

- Kristy's Donuts
  - Improvements:
- Coffee world
  - Improvements:
- Nails R' US
  - Improvements:
- Cityville Manor
  - Improvements:
- Cityville Brewery
  - Improvements:

$ Spent:

7/12 Binders, Staples (12) $40.00
7/12 Dividers, Staples $20.00

Post Ideas

- Business Spotlight
- Volunteer Spotlight
- Event Info
- How to volunteer
- Success story
- History
- Shop of the week

Volunteer #5

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<th>Value:</th>
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<td>7/12</td>
<td>Kerry Donald</td>
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<td>7/12</td>
<td>Sara Smith</td>
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<td>7/14</td>
<td>Claydon B.</td>
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<td>7/11</td>
<td>Josie Pritchon</td>
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<td>7/13</td>
<td>Board meeting</td>
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Visit Notes

- Don't forget to ask about specials while visiting.
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**CALLS**
- Morning: 7am–9pm, 10am–12pm, 1pm–3pm
- Afternoon: 4pm–6pm

**EMAILS**
- Morning: 7am–9pm, 10am–12pm, 1pm–3pm
- Afternoon: 4pm–6pm
up next: Lisa
Comments from Other ED Testers?
Our Next Steps
Q&A

DOWNLOAD FILES TO YOUR LOCAL SYSTEM
(in case they ever move)

TRY IT OUT!
OCTOBER - DECEMBER 2022
bit.ly/nmmsplanner2022