

2023

TEAM CAPTAINS MEETING TOOLKIT





Team Captains Meetings Tip Sheet

- We have included four sample agendas to be spaced out throughout the season:
 - Building Your Team
 - Using Our Tools
 - Using Your Network
 - Event Day Logistics
- Feel free to customize the agendas or host more than four meetings if you feel it's necessary. Some events may choose to have monthly Team Captains Meetings by Zoom, while others may do four in-person meetings throughout the season or you may want to offer both options.
- If you're hosting a local challenge, be sure to promote them or launch them at Team Captains Meetings. This will give you the opportunity to get the message out to your teams and will also create an urgency to want to attend these meetings.
- Consider offering door prizes to increase participation.
- Leave time at the end of every meeting for idea sharing and questions. Some of the best help for Team Captains will come from hearing what others are doing!
- Be sure to have a table of resources on fundraising available. If you're hosting virtually, be sure to send a recap email with resources attached.
- We also recommend inviting Team Captains who are experts on or had success with the topic you are covering to present with you!
- If you opted into the National Fundraising Recognition Program and order any sample items, make sure you have them at your in-person meetings or showcase and describe the items via Zoom.
- Get your Committee members involved! When talking logistics, ask your logistics chair to lead the conversation.



Team Captains Meeting #1
Topic: Building Your Team

- Welcome/Introductions
- Icebreaker (if applicable)
- 2022 Year-in-Review & Team Shout-outs
- 2023 Updates
 - T-shirt and how to earn (must be registered participant who raises \$100 or more)
 - National Fundraising Recognition Program Overview (if applicable)
- Building Your Team
 - Sphere of Influence
- Setting Goals
 - Set Your Goals section of the Team Captain Toolkit
 - Tips for helping Team Members set their goal
- Idea Sharing
- Questions & Answers



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Team Captains Meeting #2

Topic: Using our Tools

***You will want to ensure you have a projector/screen for this meeting to walk them through using the Participant Dashboard.**

- Welcome/Introductions
- Icebreaker (if applicable)
- Team Shout-Outs
- Reminders/Updates
 - T-shirt and how to earn (must be registered participant who raises \$100 or more)
 - National Fundraising Recognition Program Overview (if applicable)
- Telling your Story
 - Updating your Team Page
 - Updating your Personal Page
 - Set your goal
- Sending emails
- Resources
- Idea Sharing
- Questions & Answers



Team Captains Meeting #3
Topic: Reaching Your Network

- Welcome/Introductions
- Icebreaker (if applicable)
- Team Shout-Outs
- Reminders/Updates
 - T-shirt and how to earn (must be registered participant who raises \$100 or more)
 - National Fundraising Recognition Program Overview (if applicable)
- How to Use Facebook Fundraiser (if applicable)
- Sending emails/letters
- Idea Sharing
- Questions & Answers



Team Captains Meeting #4
Topic: Event Logistics

- Welcome/Introductions
- Icebreaker (if applicable)
- Team Shout-Outs
- Reminders/Updates
 - T-shirt and how to earn (must be registered participant who raises \$100 or more)
 - National Fundraising Recognition Program Overview (if applicable)
- Event Day Logistical Updates
- Ideas for Last Minute Fundraising
- Questions & Answers



Team Captains Meeting Emails/Phone Scripts

Meeting #1 Phone Script

Hello, this is <NAME> with NAMIWalks <LOCATION>. I was calling to let you know we're excited to host our first official Team Captains Meeting of the season on <DATE> at <LOCATION/VIRTUALLY>. Will you be able to join us?

If yes: Great! We'll be doing some 2022 shout-outs, as well as discussing this year's event and how to help build your team by recruiting more members. We'll have lots of resources and information that you'll find helpful. If you have any questions before the event, please don't hesitate to call or email me.

If no: I'm sorry you won't be able to join. We'll be discussing this year's event and how to help build your team. I'll be sending a recap email with resources and I'll be sure you get all of the information. Please let me know if I can help you with brainstorming and ideas for your team.

Thank you for your support! Our NAMIWalks Team Captains make a powerful commitment by participating in our event. Have a wonderful day.

Meeting #1 Email Template

Hello,

I was calling to let you know we're excited to host our first official Team Captains Meeting of the season on <DATE> at <LOCATION/VIRTUALLY>.

We'll be doing some 2022 shout-outs, as well as discussing this year's event and how to help build your team by recruiting more members. We'll have lots of resources and information that you'll find helpful. I hope to see you there! If you have any questions before the event, please don't hesitate to call or email me.

Thank you for your support! Our NAMIWalks Team Captains truly make a powerful commitment by participating in our event.

Sincerely,

<NAME>



Meeting #2 Phone Script

Hello, this is <NAME> with NAMIWalks <LOCATION>. I was calling to let you know that our second Team Captains Meeting of the season will be on <DATE> at <LOCATION/VIRTUALLY>. Will you be able to join us?

If yes: I'm so happy you'll be able to join us. At this meeting, we'll be doing a deep dive into our participant dashboard. I'll be doing a live tutorial on how to update your page and send messages. If you have any questions before the event, please don't hesitate to call or email me.

If no: I'm sorry you won't be able to join. At this meeting, we'll be doing a deep dive into our participant dashboard. I'll be doing a live tutorial on how to update your page and send messages. Please let me know if you'd like to set up a different time for me to walk you through that one on one.

Thank you for all you do. As a Team Captain for NAMIWalks, you're leading the charge toward our goal of Mental Health for All.

Meeting #2 Email Template

Hello,

I'd like to invite you to our second Team Captains Meeting of the season which will be on <DATE> at <LOCATION/VIRTUALLY>.

At this meeting, we'll be doing a deep dive into our participant dashboard. I'll be doing a live tutorial on how to update your page and send messages. If you have any questions before the event, please don't hesitate to call or email me.

Thank you for all you do. As a Team Captain for NAMIWalks, you're leading the charge toward our goal of Mental Health for All.

Sincerely,

<NAME>



Meeting #3 Phone Script

Hello, this is <NAME> with NAMIWalks <LOCATION>. I was calling to let you know that our third Team Captains Meeting of the season will be on <DATE> at <LOCATION/VIRTUALLY>. Will you be able to join us?

If yes: Great! We'll be talking about how to reach out to engage your network in your fundraising. We'll also be doing a live demo of how to start a Facebook fundraiser. (If applicable.) If you have any questions before the event, please don't hesitate to call or email me.

If no: I'm sorry you won't be able to join. We'll be talking about reaching out to your network to raise more funds and showing a live demo of Facebook Fundraiser (if applicable). Please let me know if you'd like to set up a different time for me to walk you through that one on one.

I hope you're as excited as I am that NAMIWalks event day is quickly approaching! Keep up the amazing work and thank you for all you do.

Meeting #3 Email Template

Hello,

I hope you can join us for our third Team Captains Meeting of the season on <DATE> at <LOCATION/VIRTUALLY>. Will you be able to join us?

We'll be talking about how to reach out to engage your network in your fundraising. We'll also be doing a live demo of how to start a Facebook fundraiser. (If applicable.) If you have any questions before the event, please don't hesitate to call or email me.

As a reminder, every registered participant who raises \$100 or more will earn their official NAMIWalks event T-shirt. We know you'll leave this meeting with many fundraising tips and ideas to get you and all your team members to that goal.

I hope you're as excited as I am that NAMIWalks event day is quickly approaching! Keep up the amazing work and thank you for all you do.

Sincerely,

<NAME>



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Meeting #4 Phone Script

Hello, this is <NAME> with NAMIWalks <LOCATION>. I was calling to let you know that our final Team Captains Meeting of the season will be on <DATE> at <LOCATION/VIRTUALLY>. Will you be able to join us?

If yes: Wonderful! We will be talking about event logistics and sharing ideas on last-minute fundraising. If you have any questions before the event, please don't hesitate to call or email me.

If no: I'm sorry you won't be able to join. We will be talking about event logistics and sharing ideas on last-minute fundraising. If you have any questions before the event, please don't hesitate to call or email me. Please let me know if you'd like to set up a different time for me to walk you through that one on one.

NAMIWalks is right around the corner! I hope you're as excited as I am. Thank you for your support!

Meeting #4 Email Template

Hello,

I hope you can join us for our final Team Captains Meeting of the season on <DATE> at <LOCATION/VIRTUALLY>. Will you be able to join us?

This will be our last Team Captains Meeting of the season and we will be talking about event logistics and sharing ideas on last-minute fundraising. If you have any questions before the event, please don't hesitate to call or email me.

As a reminder, every registered participant who raises \$100 or more will earn their official NAMIWalks event T-shirt. We know you'll leave this meeting with last-minute fundraising ideas and important logistics information for Walk day.

NAMIWalks is right around the corner! I hope you're as excited as I am. Thank you for all you do.

Sincerely,

<NAME>