

Getting the Work Done with Fewer Staff

APRA-Southwest Spring Conference – May 7, 2009
Michel Hudson, CFRE

Agenda

- Overview
- People
- Places
- Things
- Summary Tips
- Q&A



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“People have a hard time letting go of their suffering. Out of a fear of the unknown, they prefer the suffering that is familiar.”

- Thich Nhat Hanh

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Overview

- Realities
 - Survey by Nonprofit Finance Fund
 - 16 percent expect to cover operating expenses this year
 - 52 percent anticipate the recession will have permanent negative impact
 - 93 percent expect an increase in demand for services
- Large & Small Donations
- Ways Nonprofits Affected
 - Corporate Profits Down
 - Markets Decline
 - Unemployment & Economic Insecurity
 - Local & State Government Cuts
- Efficient vs. Effective

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“Work environment involves only infrequent exposure to disagreeable elements.”

- from actual researcher job posting

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People

- Do you have the right people?
 - Job Descriptions
 - Hiring Process
 - Evaluations
 - Tasks Match Skills



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People

- Layoffs & Hiring Freezes
- Training & Professional Development
 - In-house vs. External
- Teamwork & Delegation
 - Team Leaders
 - Self-managing / Self-regulating
- Coaching & Leading
 - Conflict Resolution
 - Negotiation
 - Motivation

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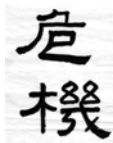
People

- Consultants
- Volunteers
- Students & Interns



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“The Chinese use two brush strokes to write the word *crisis*. One brush stroke stands for the word *danger*, the other for *opportunity*.”



- John F. Kennedy

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Places

- Offsite Resources
- Flex-time
- Telecommuting
- Contract/Freelance Workers
- Retreats/Planning



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“If you are distressed by anything external,
the pain is not due to the thing itself, but
to your estimate of it; and this you have
the power to revoke at any moment.”

- Marcus Aurelius Antonius

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Things

- Freebies
- Intranets
- Office Tools
- Online Fundraising
- Passive Research



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Summary Tips ("Doing More With Less")

- **SPREAD THE WORD**
 - Make communication a priority.
 - Focus on the good.
 - Be honest and accessible.
- **MANAGE TIME AND PROJECTS**
 - Assess and assign workloads appropriately.
 - Empower employees.
 - Minimize meetings.
- **REWARD SUCCESS**
 - Don't let budgets limit recognition.
 - Be specific.
- **SET THE STANDARD**
 - Lead by example.
 - Avoid burnout.



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Q&A

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10 Keys To Time Management

1. Start With The Recognition That You Are Not Effectively Managing Your Time

You can only manage yourself (your attitudes, beliefs and actions) within the flow of time. The experience of time has more to do with your thoughts than with clock time. The stress you feel that you associate with time originates in your thinking. Example: Think about the distinction in your perception of time between when you're late and when you're waiting for someone who's late. The actual clock time doesn't change, but your experience of time does, based on your perception.

2. Prioritize Your Efforts

Stephen Covey, author of *The Seven Habits of Highly Successful People*, makes the distinction between things that are important and things that are urgent. Most of the time, doing the things that are important, rather than urgent, results in greater effectiveness. In other words, don't major in minor things.

3. Do Less To Get More

Economize your efforts. Example: when you're boiling a pot of water, you can fill the pot with water, cover it and turn on the heat and let it come to a boil while you do something else or you can "watch the pot" while it comes to a boil.

4. Eliminate Sources Of Adrenaline

These are substances, activities, relationships, situations, or attitudes that result in your feeling "charged up". Adrenaline can distract you from the focus needed to complete a project, increase feelings of anxiety, and intensify the feeling that time is flying. Over time, excessive adrenaline can have negative health consequences as well.

5. Eliminate Things, Which Are Taxing Your Time and Energy

These are the situations, attitudes or behaviors (in yourself or others) that you're putting up with in your personal or work life, which don't serve you or your larger purpose but consume physical, mental and/or emotional energy. Eliminating them results in an increase in available energy for people and projects, an over all feeling of calmness, and the experience of more time to get things done.

6. Simplify your environment.

Clutter in your office or home environment can create stress. It can actually "feel" like you have more work to do than you really do when you "archive" things you don't need in your environment.

7. Simplify Your Tasks

This may involve over-responding and/or under-responding. Examples: Under-responding — a fax, which needs only a quick response or a confirmation. You can write your answer on the faxed document and fax it right back. Over-responding — if someone asks you for something specific, and you know that by offering more help than was specifically asked for, you can avoid the situation or issue from coming back to you in the form of a problem, then isn't it worth it to do more? Make a point of over-responding to any situation in which there is an opportunity to solve more than one problem in the process and when there is the potential for the situation to be presented again, requiring additional energy.

8. Really Listen To Others

When you allow other thoughts to intrude into your "listening space", you actually create anxiety for yourself about both what you are listening to and what you allow to intrude. This anxiety is created because you can neither act immediately on the thoughts you allowed to intrude, nor can you completely take in what the person with whom you are talking is trying to tell you. You are left feeling incomplete with both.

9. Decide What You Can Give Up In Order To Get What You Want

The day has only 24 hours in it, and yet, how many times have you "borrowed" from the next day to finish a project and thereby lost valuable sleep, or "borrowed" from your relationships to pursue a goal, or borrowed from your personal time with yourself to work on a project? When we choose among multiple possibilities for how we will spend our work and/or personal time, the universe almost always asks us to choose what we will give up in order to have the "more" in our personal or work lives. Much pain and suffering around "managing time" could be avoided if this process were respected.

10. Find some time each day for quiet reflection.

When you commit to spending some time each day suspending your thoughts and judgments and creating inner stillness, you'll train your body and mind in what it feels like and with that awareness, you can transform how you experience the flow of time when you are "in the world".

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Top 10 Steps To A Perfect Day At The Office

Whether you work out of an open concept cubicle, an office with a door or a home office, interruptions and an unorganized workday will leave you frustrated, fatigued and unsatisfied by the end of it. When you take charge of your environment and stop tolerating the things that hold you back from your goals you will expand the time available to you and give you more time for fun.

1. First, plan the whole week taking into consideration when you have your high energy time each day.
2. Schedule all your activities, including your own tasks, travel time, quiet time, cushions for breaks and emergencies as well as appointments with others.
3. Group similar activities into their own time blocks, e.g., calls out; memo writing; mail handling and answering, etc.
4. Select the biggest, most important job and do it first.
5. Break up very large projects into manageable chunks, stop and do something different at the end of each chunk.
6. Select mini-rewards for jobs completed; e.g., coffee, bagel, fruit, short stretch or walk.
7. Make adjustments to your schedule as required, be flexible.
8. Delegate every task that someone else can do.
9. Find something complimentary to say to everyone who speaks to you and move on quickly.
10. At the end of the day; clean off your desk; update the next day's plan; take no projects home.

The Right People in the Wrong Jobs

By [F. John Reh](#), About.com

Recently, I was speaking with a System Architect friend who expressed frustration with her current project. "The Project Manager is not using the (people) resources well," summarized this former manager's complaint.

Manager's Perspective

What manager hasn't struggled with the problem of not having enough of a key resource needed to do the job? You shuffle people, juggle tasks and priorities, and plead for more resources. You cross-train where you can, contract specialists if you can, and work far too much overtime. You know how much it is taking out of you over time, but what about the people you supervise. What is it doing to them?

What About Your People?

The key people on your team like being busy and feeling needed. Yet they can easily burn out and begin to resent the demands you place on their skills. Others on the team are bored with being underutilized or unhappy being cross-trained to help in areas they lack skill or interest.

"Think of all the hours lost," the system architect told me "by people doing jobs they aren't suited for or excited about."

Why Does It Happen?

Some people are in the wrong job, and doing the work, because they want the attributes of the job. A doctor might be a surgeon for the prestige, but have no interest in people. Some are 'stuck' in a job they don't like because they can't get anything better suited to them. This may be due to a lack of the specific skills needed, a lack of initiative, or no job hunting skill. Others may work at the wrong job because of pressure to stay in 'the family business', or because they think a certain career is expected of them for whatever reason. Many people start a work history with the first job they can get and just stay in that industry forever.

What Can You Do?

We know that people do best at the work that they enjoy doing. You, as a manager, have some control over the situation simply by how you manage. When you give a person the latitude to decide how to do their job, instead of micro-managing every detail of every task, they will do things in a way that is most enjoyable for them. The result will be a more productive, satisfied employee. You will have more time for managing the 'big picture' and will make yourself more promotable. You'll also be able to concentrate your time on the things that YOU do best too.

More importantly, be sensitive to the skills and interests of your employees as you assign them to jobs. Try to put people in jobs that suit them. Put the dreamer in charge of creative tasks. Put the detail-oriented individual on tasks with more structure. Don't put your introverted loner into customer service.

Just think how much more would get done if people only did jobs for which they had the talent, and a real passion.

How Do You Determine The Best Fit?

There are a lot of companies that will either sell you the tools to do employee screening and testing or do the work for you, for a fee. Most of this is aimed at pre-employment screening to make sure you get the best employees. Firms like ADREM Profiles, Inc. will [check out a prospective employee](#) for you by checking for criminal record, verifying educational qualifications and employment history, etc.

While that is important, this article focuses on this 'best employee' after they have been hired. How do you make sure you get them in the right spot.

[Carl Jung](#), noted Swiss psychologist and the founder of the Jungian approach to psychotherapy, gave us the concept of personality typology. Isabel Briggs Myers and Katharine C. Briggs created a refinement called the Myers-Briggs Type Indicator (MBTI). Many companies, like [The Brain Type Institute](#), will conduct MBTI personality inventories of yourself and your employees, classifying an individual into one of 16 types.

[Dr. David Keirsey](#) developed the concept into the [Keirsey Temperament Sorter](#). His [self-administered test](#) lets you answer 72 questions online and determine your temperament and variant. His [descriptions of the 16 types and subtypes](#) should help you better understand, and place, your people.

What's Your Brain Type?

Are you an ENSP, an INTJ, or an IxFP? How does that help you understand yourself and your people and manage them better? See what your peers think and share your perspective.

What You Need To Know About Surviving Layoffs.

Surviving in this era of layoffs and RIFs means learning these coping skills.

By [F. John Reh](#), About.com

Every morning, it seems, you read an article in the paper about layoffs at another company. Those layoffs are hard on the people who get laid off, but they are also just as hard on the people left behind. There is more work to be done and fewer people to do it. There is the lingering fear that more layoffs might happen or that the company might close altogether. Here's what you need to know to survive in this business climate, both as a manager and as an employee.

As an employee

Your employer believes that you are good at what you do. You are valuable to the company and its plans for the future. That's why they kept you and not someone else. They believe you are capable of producing more, or better, work than others. To survive in this climate every employee must look out for the Company's interest as well as there own.

- Figure out what's important and to do that. Work on what's important not merely urgent.
- Recognize that there is not enough time to do everything. You have to do more, but don't expect to be able to do everything.
- Find better ways to do things. Streamline and simplify. There isn't time for a lot of things that people used to do before.
- Be positive. This is a tough time for everyone. No one has time for negative energy. No one needs to be reminded of how things used to be.
- Be realistic. Even if you and your remaining co-workers do everything you can, the company may still be overwhelmed by external forces.

As a manager

Obviously the survival skills for all employees apply to managers as well. You also need to work on what's important; to streamline and simplify. Be positive. Be realistic. Here's what else you need to do as manager to help your group survive in this climate.

- Provide leadership. Now more than ever your people need you to tell them what's really important. Help them understand how their new role fits into the company's overall plans.
- Find ways to reduce the workload. There simply isn't the bandwidth anymore to do things that aren't absolutely required.
- Coordinate with other departments to ensure that your department's streamlined procedures will still give them everything and they need to do their jobs. Make sure their streamlined procedures still give you and your people everything you need to do your jobs.
- Cut them some slack. Don't reduce your quality standards, but be reasonable in what you expect from your people.
- Help them cope. Each of your people is an individual and has to deal with this new climate in their own way. Some may have questions. Honestly answer those that you can. Some may need to talk. Give them a little time to vent if they need it, but get the conversation moving forward as quickly as possible.
- Take care of yourself. Don't try to be a superhero. Do everything you can to help the company survive and advance your own career, but don't kill yourself in the process.

In the end

This business cycle will turn around. The recession will end. Before long you will once again be spending a lot of your time trying to find and hire good people. If you do things right now, you will have a solid core team going forward. Your streamlined procedures and your focus on the important things will help your company be even more profitable going forward. You will have done your job as a manager in a very tough business climate and done it well.

Building an Effective Orientation Program

You never get a second chance to make a good first impression. This goes for the many companies who view the orientation process as a necessary evil, an uncomfortable afterthought to the hiring process. Forgotten is the fact that other than the recruiting period, orientation is the first image an employee has of your company. And that picture likely will stay with the employee throughout his or her tenure.

By failing to build an effective orientation program and make its implementation a priority, companies can blow it big time. They lose a perfect opportunity to instill their values and corporate culture. What's worse, they stifle the employee's excitement and enthusiasm. The unintended message is that the company is doing the employee a favor by hiring them. In reality, it is the new employee who is doing the company the favour.

It doesn't have to be this way. A thoughtfully planned and executed orientation program helps ease the transition to the workplace. Companies that keep orientation intentional, and even lively, go a long way to tapping the full skill set of the new hire as well as igniting his or her excitement and enthusiasm. It's well worth the investment of time and resources to get the new employee to be a fully engaged member of the team as soon as possible.

While there is no one-size-fits-all orientation program, a smooth and organised approach demonstrates that your employees are your most important resource. Whether or not your company has a formalised orientation process, you can apply many of these elements with your own staff.

- **Coming attractions.** Before the new employee reports on the first day, send him or her a package that provides an overall picture of the organisation and conveys your excitement about them coming on board. Focus on what each area does and how all the employees are connected, but keep it light. Send out a book that you've challenged your team with, "war stories" that offer insights into how your company does business, and several promotional items (ideally geared to their interests) to make them feel a part of the team.

Also, get some personal information about the new person and circulate it around the office. It doesn't matter what form it takes - email, memos, newsletters. The point is for everybody to know there's a new person on board. Better yet, when your staff knows a little more about the hobbies, interests and background of the new person, it makes it easier for them to go out of their way and extend a welcome. Penetrating the shell of the existing workforce is one of the toughest obstacles for a new hire.

- **Greetings from above.** The best orientation programs begin with the chief executive of your company. Nothing says we value our employees better than a personal welcome from the top on the employee's first day. Not only does it give the new person a better feel about the corporate culture, it makes them feel better about their new job. The sad reality is that few top dogs make that a priority. If that's not going to happen in your company, then it's up to you to seize the opportunity and set the proper tone.
- **Party time.** Whether you have one new employee or a dozen, throw a welcome reception at the beginning of the first day. Celebrate their decision to join a premier organisation. The party atmosphere can be simple - doughnuts, coffee and juice. Maybe even taking a group to lunch. The purpose is to build camaraderie among the key people in a festive and relaxed setting.
- **Nuts and bolts.** Make sure your orientation includes the rules and values of your company. There are the mandatory forms to fill out and review of company policies that are generally handled by the human resources department. You should then take the time to review these with the new employee to show how they work in the real world. Spend a few minutes going over the corporate culture, your plans and expectations, and making the new employee feel comfortable.
- **Take a tour.** Take the new employee around the building so they know where everything is, including meeting rooms, the cafeteria and even the restrooms. This will also provide good opportunities to share more insights about the corporate culture and to show how the new person fits into each department's function.

- **Develop an agenda.** Like anything else worth doing, you have to put together a plan of what it is you want to accomplish. Plan the appropriate office visits with the people and departments your newest staff member will be working with. You should develop an agenda, share it with your new employee and ensure that your people stick to it. Ideally, the agenda ought to be structured with one or two visits in the morning, followed by a lunch with a key executive. During the employee's first week on the job, he or she should never have to buy lunch. Avoid the temptation to cram too many meetings into too short a period. The afternoons should be held open for the new employee to get accustomed to the new environment. This could easily go on for one or two weeks.
- **Tools of the trade.** Most new people are eager to see their workspace. After all, that's their home away from home. Take the time to make sure it's clean and inviting. Have all the tools they need to do their job - desk, chair, computer, telephone, business cards, stationery, office supplies, nameplate and badge, uniforms, safety equipment. If you were coaching a baseball team, you'd never send a player out in the field without a glove. You shouldn't do that on the job either. Employees feel much more welcome knowing they were thought of in advance.
- **Involve the whole company.** Involve as many people in your orientation process as possible. This helps put a name with a face. Plus, it helps the new employee develop relationships with the people he or she will deal with most often.
- **Buddy system.** Each new employee should be paired with one of your existing staff members to answer any questions that come up and to check in from time to time. It's not much fun to work for a company where you are uncertain of the procedures to follow or who to call if you have questions. Choose your mentors wisely because they will be the face of the company for at least the first few weeks, if not longer.
- **Follow through.** After 30 days, bring the new person back in for an unofficial review. This check-in is a two-way street. First, you want to make sure the new employee feels comfortable and is contributing. But now is also a good time to pick his or her brain on ways to improve your operation.

Source: Kelly Services Australia

http://www.kellyservices.com.au/web/au/services/en/pages/building_an_effective_orientation_program.html

Building a High Performance Team

Cultivating Peak Performance

A well-oiled and disciplined team, one in which the whole is greater than the sum of its parts allows members to achieve results far beyond their individual abilities.

Building a high performance team takes a lot of hard work and skill, to blend the different personalities, abilities, and agendas into a cohesive unit willing to work for a common goal. Behind every great team is strong and visionary leader. A leader whose job is not to control, but to teach, encourage, and organise when necessary.

Following are some tips to help build a high performance team:

- **Define the need.** As a leader, you must establish the broad, compelling purpose for the team. What is the large, desired outcome? What do you want to improve? Eliminate? Change? Don't be afraid to dream big. But resist the temptation to handcuff the team by writing a detailed prescription in advance of the diagnosis. Your vision, properly articulated, will be the engine that drives and inspires your team. It will determine who should be on the team, what resources are needed, how quickly a conclusion must be reached, what falls within the scope of the team, and how success will be measured and rewarded.
- **Recruit the right people.** Now you have to find the talent that is willing to commit to your vision with missionary-like zeal. Choose members who represent a wide range of backgrounds, skills and abilities. Try to limit participation to three to seven members. Any more and each individual's contribution will be compromised.

Also look to imbue your team with a wide mix of cultural and professional viewpoints. Such diversity should give life to ideas and opinions that might not otherwise have been aired.

- **Shared values.** Not only must team members embrace your mission, they must share your values. Effective teams demand close collaboration, trust, honesty, passion, and genuine appreciation for each member's contributions. You don't want somebody that has a different work ethic, moral compass or commitment than you do. To develop that value system, challenge the team to read books, give them magazine articles, watch movies - anything that might challenge their conventional thinking.
- **Develop common goals.** A high performance team thrives in an environment where they can unite behind a common and compelling purpose - a cause everyone can understand, identify with, and commit to. Ideally, these goals should be developed by the team members themselves; this tends to create ownership, buy-in and commitment. Goals should be formalised through a written charter - an agreement that clearly states what the team wants to accomplish, why its goals are important and how the team will work together to achieve the desired outcome. Consider an off-site retreat, free from the routine pressures of the office, to set the goals. Such an event has the added benefit of injecting a spirit of camaraderie among the team members.
- **Set ground rules.** Make sure team members understand why the team exists and know the roles each member plays. They need to know how decisions will be made, how to deal with conflict, how to communicate, and how results will be measured. The success of the team depends upon creating an environment in which team members openly contribute ideas while recognising and respecting the differences in others. Above all, they need to understand how long their commitment will last.
- **Communicate, communicate, communicate.** If a statement of purpose is the engine that drives the team, communication is the oil that keeps the engine well lubricated. Fail to lubricate the engine and it will lock up. So, too, will the team fail without effective communication. Your job is to ensure that team members communicate openly and honestly, refrain from personal assaults, and stay focused on the task. Communication is more than talking; it's about listening intently, and asking questions to get clarification.

As Stephen Covey relates in his bestseller *Seven Habits of Highly Effective People*, "Seek first to understand, then to be understood." Face-to-face meetings work best in a team environment, supplemented by telephone, e-mail and faxes. It's a good idea to circulate meeting minutes to track progress and keep others in the company informed of the team's progress.

- **Promote curiosity.** Curiosity and the search for new solutions, fuels every great group. Members don't just solve problems. They are engaged in a process of discovery that serves as its own reward. But they also have another quality that allows them both to identify significant problems and to find creative, boundary-busting solutions rather than simplistic ones: they have hungry, eager minds.
- **Establish urgency.** Virtually every great group defines itself in terms of an enemy. Sometimes the enemy is real, such as a budget cut or a hostile takeover. Often the threat is more arbitrary, such as self-imposed deadlines. Tell the group it is up against tremendous odds and watch the wily resourcefulness kick into high gear.
- **Keep score.** A team can't perform if it doesn't know what it's doing. But that's not enough. There must be a commitment to constant improvement. To accomplish that, you have to measure performance. Don't wait until the end of the season to address performance. Feedback should be immediate. Practice openbook management and make sure team members have those numbers that are important to them in tracking their success.
- **Reward.** Even though their contributions may not be exactly equal, it's important to recognise the team's efforts. Acknowledge individual achievement during group meetings and compliment the team as a whole on working well together. Highlight interim successes with a team lunch or food brought into a meeting. Such mini-celebrations are a great morale booster. People repeat performance that garners reward and recognition. When you focus on the positive, you develop the habit of doing things right.
- **Back off.** If you've implemented the above steps correctly, then get out of the way. As the leader, your role will change over the life of the team. In the beginning, you may have spent a lot of time developing the mission, identifying what the team was setting out to accomplish, and, more importantly, helping develop interpersonal and group skills such as conflict resolution and meeting management.

Now comes the time to let go and let the team become performers and the leaders. Trust the team process, even if you think you know better. Nothing undermines a team faster than for their moves to be trumped. Teams must be empowered to achieve the results, without fear of being overridden by the top floor.

Follow these guidelines and you're well on your way to building a high performance team. Develop the basic skills and a game plan, and stick to it. Work as a team and you can beat some of the best individuals out there.

Source: Kelly Services - Australia

http://www.kellyservices.com.au/web/au/services/en/pages/management_skills_building_a_high_performance_team.html

Effective Meetings Produce Results: Tips for Meeting Management

Ensure Results by Planning Before the Meeting

By [Susan M. Heathfield](#), About.com

People spend so much time in meetings that turning meeting time into sustained results is a priority for successful organizations. Actions that make meetings successful require management before, during, and after the meeting.

If you neglect any one of these meeting management opportunities, your meetings will not bear the fruit you desire from the time you invest in meeting. Take these twelve meeting management actions to guide meeting attendees to achieve expected, positive, and constructive outcomes.



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Before the Meeting to Ensure Effective Meetings

Actions before the meeting establish the groundwork for accomplishing meeting results. You can do all of the needed follow-up, but without an effective meeting plan to start, your results will disappoint you.

Plan the Meeting

Effective meetings that produce results, begin with meeting planning. First, identify whether other employees are needed to help you plan the meeting. Then, decide what you hope to accomplish by holding the meeting. Establish doable goals for your meeting. The goals you set will establish the framework for an effective meeting plan. As Stephen Covey says in the *Seven Habits of Highly Effective People*, "Begin with the end in mind." Your meeting purpose will determine the meeting focus, the meeting agenda, and the meeting participants.

Make Sure You Need a Meeting

Once you've developed your meeting plan, ensure that a meeting is the appropriate vehicle for accomplishing the set goals. To schedule and hold a meeting is expensive when you account for the time of the people attending. So, make efforts to determine that a meeting is the best opportunity to solve the problem, improve the process, or make an ongoing plan.

You may find that you can accomplish the meeting goals with an email discussion or by distributing and requesting information through the company newsletter. Make sure the meeting is needed and not just convenient for you – you'll get better results from attendees.

Ensure Appropriate Participation at the Meeting

If a meeting is the appropriate means to accomplish your goals, check with the participants who must attend for the meeting to succeed. The needed attendees must be available to attend the meeting. Postpone the meeting rather than holding a meeting without critical staff members. If a delegate attends in the place of a crucial decision maker, make sure the designated staff member has the authority to make decisions – or postpone the meeting.

Distribute and Review Pre-work Prior to the Meeting

How many meetings have you attended that started out with the meeting facilitator passing out a ream of handouts or projecting a Microsoft PowerPoint slide for discussion? Frustrating? You bet. The meeting becomes a group read-in, hardly productive for goal accomplishment. You can make meetings most productive and ensure results by providing

necessary pre-work in advance of the actual meeting. Providing pre-work, charts, graphs, and reading material 48 hours before a meeting affects meeting success. The more preparation time you allot, the better prepared people will be for your meeting.

Documentation that will help you achieve the meeting goals can include reports; data and charts such as competitive information, sales month-to-date, and production plans; Microsoft PowerPoint slides that illustrate key discussion points; and minutes, notes and follow-up from earlier or related meetings and projects. Pre-work distributed in a timely manner, with the serious expectation that attendees will read the pre-work before the meeting, helps ensure meeting success.

More about making meetings effective:

- Effective Meetings Produce Results: Tips for Meeting Planning
- [Effective Meetings Produce Results: Tips for Meeting Implementation](#)¹
- [Effective Meetings Produce Results: Tips for Meeting Follow-up and Success](#)²

During the Meeting to Ensure Effective Meetings

Effective use of meeting time builds enthusiasm for the topic. It generates commitment and a feeling of accomplishment from the participants. People feel part of something bigger than their day-to-day challenges. Therefore, a well-facilitated, active meeting, that sets the stage for follow-up, will produce meeting results.

Effective Meeting Facilitation

The meeting leader sets a positive, productive tone for interaction among the meeting participants. Effective meeting facilitation starts with a review of the goals, or anticipated outcomes, and the agenda. The facilitator helps group members stay focused and productive. Meeting design and the agenda set the framework for the meeting. An effective facilitator, who keeps participants on track, ensures the accomplishment of expected, desired results from the meeting.

Use the Pre-work in the Meeting

Use or reference the pre-work and other information supplied prior to the meeting during the meeting. You reinforce the need for participants to spend the time needed upfront to review material that is integral to accomplishing the desired results. You participants will prepare prior to attending your meetings and your results will bear testimony to solid preparation and leadership.

Involve Each Participant in Actions

Every work group has various personalities that show up for meetings. You have quiet coworkers and people who try to dominate every platform. Whether facilitating or attending the meeting, you need to involve each attendee in the accomplishment of the meeting goals.

This ensures that each participant is invested in the topic of the meeting and in the follow-up. You'll accomplish more results with the whole team pulling than with one dominant staff person trying to push everyone else up the hill.

Create an Effective Meeting Follow-up Plan

During the meeting, make a follow-up plan with action items. Effective plans include:

- the specific action item,
- the name of the person who committed to "owning" the accomplishment of the action item,
- the due date of the action item,
- an agreement about what constitutes completion of the action item.

Discuss real life scenarios and barriers to success that team members may experience as they try to accomplish the items that will produce the required results. Set a time for your next meeting, if needed, while participants are in attendance.

More about making meetings effective:

- [Effective Meetings Produce Results: Tips for Meeting Planning](#)³
- Effective Meetings Produce Results: Tips for Meeting Implementation
- [Effective Meetings Produce Results: Tips for Meeting Follow-up and Success](#)⁴

After the Meeting to Ensure Effective Meetings

Actions and planning before and during the meeting play a big role in helping you achieve expected, positive, and constructive outcomes. Your actions following the meeting are just as crucial. Follow-up at the next scheduled meeting is never enough of an investment to ensure results.

Publish Meeting Minutes

Begin by publishing your minutes and action plan within 24 hours. People will most effectively contribute to results if they get started on action items right away. They still have a fresh memory of the meeting, the discussion and the rationale for the chosen direction. They remain enthusiastic and ready to get started. A delay in the distribution of minutes will hurt your results since most people wait for the minutes to arrive before they begin to tackle their commitments.

Effective Meeting Follow-up

Respecting and observing deadlines and follow-up will help you achieve results from your meetings. The deadline was established during the meeting. Following the meeting, each person with an action item should also make a plan for their personal accomplishment of their commitment. Whether they write the steps in their planner, delegate the tasks to another staff person, or just complete the task, the individual is responsible for follow-up.

So is the meeting planner. You can improve meeting results by following up with each person who has an action item mid-way between meetings. Your goal is to check progress and ensure that tasks are underway. Remember that what you ask about gets accomplished.

Accountability for Follow-up during the Next Meeting

Have you ever sat in a follow-up meeting that consisted of each participant telling the group why they were unable to accomplish their commitment? I have, and the result is deplorable. Establishing the norm or custom of accountability for results begins early in your meeting cycle.

Follow-up by the facilitator mid-way between meetings helps, but the group must make failure to keep commitments unacceptable. Report on progress and outcomes at the next meeting and expect that all will have been accomplished. Alternatively, check progress at the next meeting and if there is a real roadblock to progress, determine how to proceed.

Debrief the Meeting Process for Continuous Improvement

The practice of debriefing each meeting is a powerful tool for continuous improvement. Participants take turns discussing what was effective or ineffective about the current meeting process. They also discuss the progress they feel the group is making on the topic of the meeting.

Taking continuous improvement to another level, successful teams debrief their entire project as well as the process to

determine how effectively they managed to create results. Future meetings reflect the evaluation. Meetings evolve as an even more effective tool for creating organization results.

Conclusion

Results are achievable and predictable from well-planned and implemented meetings. Follow these twelve recommendations to ensure that meeting attendees achieve expected, positive, and constructive outcomes from the time invested in meetings.

More about making meetings effective:

- [Effective Meetings Produce Results: Tips for Meeting Planning](#)⁵
- [Effective Meetings Produce Results: Tips for Meeting Implementation](#)⁶
- Effective Meetings Produce Results: Tips for Meeting Follow-up and Success

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Your Library Card:

Why it's the Most Important Card in Your Wallet

If you haven't been to your local library in a while, you may not be aware of the plethora of resources available to help grow your business. Many of those resources are online, and your library card is your gateway to many expensive databases....at no cost to you! And, in these economic times, we're all looking for ways to grow our business that won't cost us a fortune.

First....if you don't have a card, you can find your local library's website by visiting www.publiclibraries.com. And, if you find your community library doesn't offer the databases you're seeking, you may find that the state level does indeed offer you access via their portal. Here in New Jersey, we have the New Jersey Knowledge Initiative (<http://www.njki.org>), funded in large part by tax dollars. NJKI enables you to sign up online for a library card, too. So, no more excuses.....it's time to get your own card and max out the value of that bar code on the back!

What can you access with your card?

- **ReferenceUSA** enables you to search for business contacts within the industries or geographic regions of interest to you. If Business-to-Business contacts are important for your own business growth, then you'll definitely want to access this resource. The ReferenceUSA database contains detailed information on more than 14 million US businesses, 210 million US residents, 855,000 US health care providers, 1.5 million Canadian businesses, and 12 million Canadian households.
- **The Encyclopedia of Associations** lists nationwide organizations you may want to target for networking events, education and speaking opportunities. Here you may find many allied professionals for cross-referral business opportunities, too. Simply search by key word and a complete nationwide list appears with full contact information and website links. Via this website, you can see if there is a statewide affiliate that may be of interest to you.
- **Marquis Who's Who** chronicles the lives of America's most noteworthy men and women. The biographies are supplied by these noteworthy Americans themselves, providing you with a snapshot of family, work, charitable interests, civic ties, religious and political affiliations. In terms of prospecting for connections in your own community, you can search by city name or zip code and a full list is provided of these noteworthy Americans. If you have an important meeting with a corporate decision-maker, for instance, why not see if they are listed and get a sense of who they are BEFORE your meeting?
- **Newspapers and Magazines** are archived through EBSCOhost, Infotrac, and Proquest. If you need to stay on top of certain industries or you're about to embark on business expansion into another market, then relevant news articles are a must.

If the databases you access don't pull together the information you're seeking, a reference librarian is usually waiting to help you 24/7. Many states provide you with the ability to engage a librarian in a live chat and a full transcript of this chat will be emailed to you with answers to your questions. In New Jersey, this service is <http://www.qandanj.org> so I encourage you to check them out.

I've pulled together just a sampling of what you'll access with your library card and I highly encourage you to find those resources that can help you grow your business. At a recent speaking engagement on this topic, one participant said "I had no idea that my dusty little library card was 'gold'". Finding gold in these economic times is indeed something we can all relate to.

Maria Semple, Principal
The Prospect Finder LLC

Tightening Your Fundraising and Marketing Budget: Three Things You Can Cut Out

Take a deep cleansing breath. In through the nose, out through the mouth. Ok, now that we're in a calmer place, let's talk about *budget cuts*--wait wait, keep breathing!

Yes, hearing the words "budget cuts" can be painful and difficult to swallow. And unfortunately they're inevitable. With that in mind, it's time to take a strategic look at your programs and spending, and separate the grain from the straw.

It's threshing time!

- **High investment, low return programs.** In good times, you pay a lot of attention to return on investment to keep your efficiency good. But during these low periods, you turn that around and just say, "Can we cut ourselves a break when it comes to efficiency?" Just make sure you're **measuring net revenue**; the last thing you need is an event or program that brings in big bucks but is costing you even bigger.
- **Certain donor-recognition programs.** Are you making a phone call, making a plaque or throwing a parade when your donors hit certain thresholds or milestones? We believe these activities help donors give more, but in a lot of cases we can't prove it. So things like that are cut-able at times like this. In better times you bring them back if you can afford it, but right now it's going to be hard to spend that kind of money. Determine what levels still need recognition and then [get creative with thank-you's](#) (check out the child's-drawing example).
- **Brand advertisements and other un-measurable marketing.** We're not talking about ads for people to purchase event tickets--this is about those lovely brand- and awareness-building spots. No money comes out of people knowing who you are. So ask yourself this: Do you want to move 100 people 10% of the way towards giving or do you want to move 10 people 100% of the way towards giving? Which one is going to put more dollars in your bank account?

(Network for Good)

Two Things You'd Be Crazy to Cut Out of Your Fundraising/Marketing Budget

[Print this Article](#)

By Jeff Brooks: Jan 23, 2009

It's been a tough year for a lot of us. And as much as we hate to say it, we as fundraising people probably face cuts. You can't hold it off forever, but you need to be smart about what programs you put aside and which ones you keep going. Let's talk about what you'd be crazy to cut:

Net-positive Donor-cultivation Programs

This term refers to anything you're doing that's gaining net revenue. Basically, if you cut these programs, you're cutting revenue. It sounds very "Business 101," but a lot of nonprofits do not measure net gains--they measure gross revenue and assume that big dollars mean success. Unfortunately these organizations may be hosting events that produce a lot of money but are losing money overall.

For instance, say you have an event that costs you a lot of money and it brings in a lot of money. If you're looking at net revenue and return on investment (the efficiency at which you raise your money), you can say, "Well, you know, for every dollar we spent, we've brought in \$1.50." That's not so great in terms of returns. *However, in a time like this, that may be acceptable.* (In a more flush time, you might say, "You know what? The opportunity cost and the staff time we're spending could be spent in a different way.")

For now, simplify it down a little bit to this: Are you measuring net revenue? Would this cut cost you revenue?

Donor Acquisition

This may be more difficult to defend from the "ax-man," as donor acquisition typically costs you money. You lose money in order to gain donors, and cutting it actually means that your organization's bottom line looks better as you do it.

However, donor acquisition is your organization's food; if you do not acquire new donors now your organization will suffer in the long-term. Typically, the first year you have a new donor you break even--whatever that acquisition cost you, you get about that much back. However, moving forward, second-year donors will typically return 2:1 and third-year donors about 3:1. As you go to the fourth year and beyond, your return on investment skyrockets to about 10:1.

Therefore, if you make cuts in acquisition now, you are making the decision that your organization's recession is going to last two, three, or more years longer than THE recession. We do not know how long this economic downturn is going to last, but if you want it to end when it ends (and not years later when your donor value catches up), do not cut donor acquisition.

Related Articles

[The Ax-man Cometh: What to Cut / What NOT to Cut in Your Fundraising/Marketing Budget](#)

doing more with less: managing workflow with fewer resources

By Domeyer, Diane Publication: [Women in Business](#) Date: Thursday, July 1 2004

For the last several years, managers have faced many tough challenges resulting from changes in the economy. While many firms are beginning to see increases in business, they remain cautious with decisions to expand staff and budget levels. Keeping a strong sense of motivation remains a key concern because the contribution of each member of the team is more critical than ever. Higher stress levels and increasing workloads need to be managed wisely to prevent burnout. As a manager you can take steps now to increase productivity, encourage employees and grow your business.

SPREAD THE WORD

- * **Make communication a priority.** A common response to changing times is to limit communication, usually by cutting back on internal newsletters, canceling staff meetings and conducting closed-door strategy sessions. Employees want to know where the company stands - where they stand - and they want to hear this from you, not the rumor mill.
- * **Focus on the good.** Find examples of successes and spotlight them: a team project that went well; an increase in revenue; etc.
- * **Be honest and accessible.** When your team gets the real story from you, you'll earn their loyalty. Whenever possible, relay information in person rather than through e-mails and memos. Encourage feedback and questions from everyone, especially those who tend to be more reserved.

MANAGE TIME AND PROJECTS

- * **Assess and assign workloads appropriately.** Match skill sets of existing employees with highest priorities. Fill in gaps with the help of temporary and project staff.
- * **Empower employees.** Charge your workers with setting their own objectives and priorities. Avoid the tendency to label everything "ASAP" Encourage their feedback about what tasks can be delegated, handled by contingent staff or postponed. Teach employees the value of addressing key priorities and alleviating distractions. Make everyone accountable - not just "star players."
- * **Minimize meetings.** Hold a meeting only when you have critical news to share. Invite only those required to participate, create an agenda and stick to it.

REWARD SUCCESS

- * **Don't let budgets limit recognition.** Employees understand that resources remain tight and don't expect a windfall. be creative with low-cost rewards such as public acknowledgements, additional time off, desirable assignments and flexible work schedules.
- * **Be specific.** It is no secret that positive reinforcement of the type of behavior you want will bring you more of the same. Don't just thank an employee for meeting a tight deadline; acknowledge his or her exceptional management or attention to detail that led to the accomplishment.

SET THE STANDARD

- * **Lead by example.** Keep an upbeat perspective, assist and encourage rather than micromanage, and emphasize the positive to your employees continually.
- * **Avoid burnout.** Show employees it's OK to take breaks and do what is necessary to recharge. While everyone may be working harder, encourage your team to work smart through effective time management.