

# The Supervisor as Planner and Manager

Supervisors frequently offer two reasons for not planning as much as they should. The first is lack of time, the common complaint being, “I’m so busy putting out fires, I don’t have time to plan.” The other is the supervisor’s tendency to take immediate action when something goes wrong or when the unexpected happens. In crises, most supervisors feel more comfortable doing something about it before taking the time to think and plan how to deal with it. Unfortunately, this often leads to further crises. Supervisors find themselves fixing one dilemma, then hurrying on to the next. Caught in this stressful cycle, they quickly use up one of their most precious resources: time. Sound familiar?

By learning to successfully plan and manage your

work, you will have fewer crises, lower stress levels, and more productive volunteers (and staff). And you will be more likely to achieve a healthy balance between the two critical Senior Corps supervisory functions—developing volunteers and getting things done.

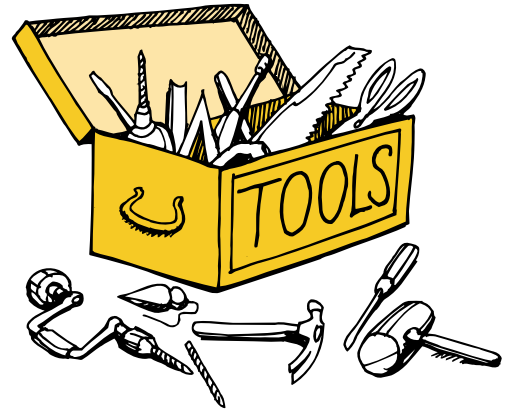
To help you gain better control of your work, we will focus this chapter on four essential and interrelated skill areas:

- Planning work;
- Setting priorities and Delegating tasks;
- Managing time; and
- Managing meetings.



# Supervisor's TOOL KIT

(These tools begin on page 3 25)



## Planning

### 25 Reasons To Plan

Reminders to yourself and others on the importance of planning

### Sample Project Planning Form

A format for writing down project plans

## Setting Priorities and Delegating Tasks

### Priority To-Do List

Sample formats for listing and prioritizing tasks

## Managing Time

### Sample Weekly and Daily Personal Planning Forms

Several types of planning tools for scheduling time and managing information

## Managing Meetings

### Conducting Effective Meetings

An explanation of how to facilitate smooth meetings by using “preventions” and “interventions” to solve problems when the group gets off track

# A Day in the Life ...

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Overextended Olive is a Senior Corps project director for thirty volunteers who serve at six different stations. Most of the volunteers have been with the project for at least ten months, and some have volunteered for over two years. It is Thursday morning, and Olive arrives at her project at 8:00 (an hour earlier than usual), and sits down at her desk to get organized for the day. She wants to be particularly efficient today so that she can eat a relaxing lunch by her favorite lake near her office for half an hour. Usually Olive works through lunch at her desk, but she has been promising herself this reward for nearly two months.

Olive sits down at her desk and sighs realizing that there are only two more days in her workweek. At least she can work quietly for the next hour before the hustle and bustle of the day takes over. She opens her briefcase to find her calendar and three restaurant napkins with lists of things to do. Her to-do lists remind Olive that she needs to make an appointment with a potential service partner by Monday, finish writing a letter of reference for a retired volunteer's file, and organize a special meeting with Senior Corps volunteers who are in their second year of service.

She starts reviewing the rest of her list when the phone rings. It is Paul, one of her favorite volunteers. He is calling to remind Olive that she has promised to bring her manual on youth team-building activities to him today.

When she hangs up the phone, she realizes that she has lent the book to another volunteer and he has not returned it. She makes a mental note to pick it up from the other volunteer and to deliver it to Paul after lunch.

At 8:30, a colleague arrives at the office. Olive chats with Samika for fifteen minutes, and then they both get back to work. At 8:45, the phone rings again. Barbara's grandson is sick and she needs to take care of him today. That means Barbara cannot make her appointment with a local reporter to give him a tour of the Meals on Wheels facility where five Senior Corps volunteers are stationed. Barbara asks if Olive could meet the reporter at 12:00. Olive says that she would rather have another Senior Corps volunteer lead the tour, but Barbara insists that Olive will be the best representative since this is an important opportunity to raise awareness of Senior Corps in the community. Olive reluctantly takes the reporter's name and agrees to meet him.

When Olive checks her email, she finds a long, detailed note from a volunteer station supervisor about a problem with a new volunteer, Alice. The supervisor, Charles, has offered Alice several service assignments, and Alice has refused each one. Charles does not know if Alice's excuses are legitimate or if she is just uncommitted. He also wonders if

Alice dislikes getting assignments from Charles because he is only twenty-seven years old and new to his position as a supervisor. Charles wants Olive to call Alice in for a reevaluation of her goals. He also requests a follow-up meeting for the three of them by next Friday. Her email box has three other incoming messages from her cousin who likes to send lists of jokes to Olive. She quickly glances at them and then returns to organizing her day.

When she looks at her calendar she remembers that today is her weekly check-in with a volunteer station supervisor and a volunteer named Eleanor. Eleanor has been an excellent volunteer for nearly two years, but now she is unable to meet her appointments consistently. She can no longer drive by herself and she is afraid to take public transportation. Olive and the station supervisor have been counseling Eleanor about her situation for weeks, but Eleanor is having a hard time accepting her inability to drive and is reluctant to help find a solution to the problem. Olive does not want to see Eleanor retire, but she has had trouble finding alternative

transportation options for Eleanor. She is not sure how to approach today's meeting and thinks she should telephone the station supervisor to develop their approach before their meeting with Eleanor at 3:00.

Olive's supervisor stops by her desk and reminds her that she promised to give a draft of the Senior Corps quarterly report for CNS to her before the due date in three weeks. Olive makes a note on her calendar that she needs to get a draft to her supervisor early enough for her to review it. She realizes that she is missing some information for the report, including five of the volunteers' time sheets. Olive sends a fax to the volunteers' school sites to remind them to bring the time sheets to tomorrow's all-volunteer meeting. She hopes that the school secretary will be able to deliver the reminder fax to the volunteers before the end of the day.

Olive checks her in-box and she is happy to find a training proposal from one of the volunteers who is a retired nutritionist. Olive has been trying to find a way to help Angela share her health knowledge as well as utilize her leadership



skills more. Olive is glad that Angela has agreed to facilitate a training session for the other Senior Corps volunteers. Olive makes a note on one of her lists to follow up with Angela about conducting the training next month. She thinks it is important to call Angela soon to acknowledge that she has received the proposal and has approved it.

Olive works on a plan for tomorrow's all-volunteer meeting when the telephone rings again. It is Alberta calling to complain about Howard's swearing. Olive knows that Howard is not using inappropriate language as much as Alberta claims. However, she does not want to disregard Alberta's feelings, so Olive promises to mention something to Howard at the all-volunteer meeting tomorrow. That reminds her that she still has not gotten in touch with two volunteers who told her that they were not planning to come to the meeting because the workshop is on youth dynamics. The two volunteers have told Olive that they do not need to come because after raising their own kids, they've "already learned the ropes—what else is there to know about children?"

It is almost 11:00 when a Senior Corps volunteer stops by Olive's office. Olive is in the middle of planning a relaxation exercise for her dedicated volunteers. Max says he only needs a minute of her time as he is on his way to a client's home. Max spends a lot of time reading to elderly people and he wants Olive to find out about having the library deliver books to his clients' houses. Olive tells Max that she read about the delivery program in the newspaper, and she is not sure of all of the details, but she will call the main library to find out more information.

After Max leaves, Olive realizes that the only way she is going to get to eat lunch by the lake and be on time for the appointment with the reporter is if she leaves the project in five minutes. Just then the phone rings again...

What should Olive do to organize herself? With others in your work group, please do the following tasks:

As you read the case study, think of yourselves as consultants to Overextended Olive.

- In your table groups, analyze what is happening to Olive. Make a list of all of the tasks that she has pending. Once you have made the list, go back through it and prioritize the tasks. Use the new tools that you have learned in your supervisory workshop to rank Olive's tasks.
- Determine which tasks Olive can afford to delegate and which ones she can postpone or say no to altogether.
- Make an organizational chart for Olive's day. List the tasks that she needs to complete and the order in which she should do them. Determine how long each task should take and list any collaborators or resources that she might need to complete the tasks.
- Make recommendations to Olive. List three things that Olive can do to organize her work better. (Think about the tools that she uses, how she manages her time, etc.) Write these tips at the bottom of your newsprint.

# Planning Work

## Why You Do It

**G**ood planning pays off in a number of ways. By setting clear objectives and defining how those objectives will be achieved, you provide needed structure and direction to your volunteers, and you give them a vision for where they are going. Clear plans help volunteers work together and help each person understand his or her role in relation to others. Planning helps you to anticipate problems and take the necessary steps to prevent them. For example, identifying the resources you will need to conduct a home rehabilitation will help you prevent costly delays halfway through the project. By getting into the habit of planning, you will improve your day-to-day decision making; rather than getting hung up on the details, you will tend to keep the longer-term objectives in mind. Contrary to the notion that “there’s no time to plan,” supervisors who plan regularly have more time, waste less energy, and are generally more efficient than their colleagues who are “crisis managers.” Finally, since planning builds in mechanisms for monitoring and evaluation, it is the principal means by which you can measure your project’s progress and you own success as a supervisor.

## How You Do It

Most Senior Corps project directors work with plans that cover a period of one year or less. Depending on your organization and assignment, you may be asked to participate in the development of programs and service projects that address the strategies of your agency and Senior Corps. A program is defined as a set of activities that accomplish broad objectives over a relatively long period. A service project (as opposed to a local Senior Corps project) is a more narrow set of activities designed to accomplish an objective within a relatively short time period. For example, as a project director, you may develop with one or more volunteer stations, a three-year



*If you fail to plan,  
you plan to fail.*

Unknown

program to help raise environmental awareness and clean up polluted streams. A series of weekend service projects, each focused on specific stretches of local streams, might be important steps in conducting their program. As a supervisor, you will probably spend much of your planning time at the project level.

Project plans usually include the following components:

**Goals**—an overall broad but clear statement of what you want to achieve in a given period of time. “By the end of one year, we will have developed strong community partnerships with the Housing Authority and the Bureau of Family and Children Services.”

**Objectives**—similar to goals but more specific and focused on short-term results needed to meet the long-term goal. Objectives should be “SMART:” specific, measurable, attainable, realistic, and time-bound. “By the end of March, we will have established monthly partnership meetings with two representatives from each agency.” (If the project is small in scope, it may be possible to collapse goals and objectives into one component.)

**Tasks or Activities**—steps you need to do in order to reach your objectives. Tasks include information about who does what by when.

**Resources**—human, physical, or monetary resources you will need to complete the tasks/activities.

**Monitoring/Evaluation Plan**—checkpoints for measuring your progress on the tasks and your overall success in reaching the project’s objectives.

## Contingency Plans

No matter how great a planner you are, there will always be times when things go wrong. An illness takes you away from the office for several days, the local computer store decides they can't donate the two used "demo" computers they promised, or a key community partner suddenly backs out of a critical project assessment meeting. Contingency plans are alternative plans you may use when the unexpected occurs. The following three questions will help you begin developing contingencies:

- ✓ What might go wrong in my project?
- ✓ How can I prevent it from happening?
- ✓ If it does occur, what can I do to minimize its effect?

A number of planning tools are available to help you design and organize your work. Several of the simplest tools include the telephone, the clock, meetings, calendars, and to-do lists. We'll talk more about these later in the chapter. In your Tool Kit, we include a few blank planning forms for you to experiment with and adapt for your purposes. We also suggest you try your local bookstore and library for additional reference materials and sample planning formats.

Community service agencies vary greatly in their approaches to planning. Many Senior Corps project directors find themselves in a complex world of coalitions and partnerships where they must constantly share information, develop relationships, and co-plan across organizations. Sometimes it seems nearly impossible to channel all the creativity and organize all the ideas into one cohesive plan.

Are you planning enough?

Do you

Always plan before you begin something new?

Plan every week and every day (see "managing time")?

Spend more time on developing new plans than on revising old ones?

Spend as much time planning as is necessary to get the job done right the first time?

Then you're doing great!

# Setting Priorities and Delegating Tasks



## Why You Do It

Setting priorities and delegating tasks go hand-in-hand for the Senior Corps project director. First of all, you almost always have more tasks to do than time to do them. By setting priorities, you learn which tasks should be delegated and which you should handle. Once you begin delegating some lower priority tasks, you have more discretionary time to address tasks of higher priority. Secondly, one of the organizational goals of Senior Corps is to develop volunteers' capabilities. Properly handled, and for Senior Corps programs that permit it (RSVP and SCP), delegation will do just that. Volunteers will generally regard delegation not only as an opportunity to practice technical skills but also as a sign of trust and confidence from the supervisor.

## How You Do It

As mentioned earlier, there will almost always be more work than you and your volunteers can handle in a given time period. Your success as a supervisor largely depends on your ability to set priorities so that you and your team get the most important work done. In other words, in your scheduling and allocation of work, you need to give preference to those tasks and activities that will be most beneficial in meeting the objectives of your Senior Corps program (7GP, SCP, RSVP), your agency or organization, and you as a professional worker.

In his book, *The 7 Habits of Highly Effective People*, Stephen Covey counsels that, rather than focusing on things and time, we should think in terms of building and preserving relationships and accomplishing results. He says that the most important work-related tasks are those that, if done on a regular basis,

would make “a tremendous, positive difference” in your job and professional life. In broad terms, these are activities such as planning, preparation, crisis prevention, values clarification, relationship building, reflection time, and recreation.

Make a list of your current activities or tasks and circle the ones that if done on a regular basis, would make a tremendous, positive difference in your work life. Move these activities to the top of your priority list. As for the remaining activities, use the following questions to help you determine their relative importance.

## Questions for Determining Priorities

1. Do I personally need to be involved because of my unique knowledge or skills?  
(yes or no)
2. Is the task within my area of responsibility, or will it affect the performance of my team?  
(yes or no)
3. When is the deadline? \_\_\_\_\_ Is quick action needed? (yes or no.)

Use the following formula to interpret your answers:

“No” to question #1—delegate the task.

“Yes” to all three questions—assign a high priority (the task is clearly your responsibility and calls for quick personal action).

“Yes” to question #1 and “No” to question #2 OR #3—assign a medium priority (you must be personally involved and it’s your responsibility, but quick action is not needed).

“Yes” to question #1 and “No” to questions #2 AND #3—assign a low priority (you must be involved, but it’s not your responsibility and quick action is not needed).

The Priority To-Do List in your Tool Kit summarizes these three questions and helps you organize your answers onto a worksheet you can keep at your desk. Once you have a solid list, you’ll be able to organize and manage your time around

*The key is not to prioritize what's on your schedule, but schedule your priorities.*

Stephen Covey

your priorities rather than the other way around. We'll talk more about weekly and daily planning and time management later in this chapter.

Setting priorities is not something you have to do alone. You should regularly ask your sponsor's executive director as well as your volunteers for their input.

## Delegation

As an Senior Corps project director, you are responsible for achieving your project objectives through your staff, volunteer stations, and volunteers. Delegation means assigning responsibility and authority to others to accomplish a given objective. We have cited several benefits of delegation in the introductory paragraph of this section. Unfortunately, there are obstacles that can prevent supervisors from delegating as much as they should. For example:

Your boss may be a poor delegator and unable to help you learn how to do it. This doesn't mean you can't learn, it just makes it more challenging.

You and everyone you supervise may have too much work to do already. When projects are grossly understaffed, it's difficult to ask people to do something else.

You may have an "I can do it better/faster myself" attitude. It isn't your job to be able to do everything better and faster than your staff, volunteers, and volunteer stations. It's your job to get things done through staff, volunteers, and volunteer stations and develop their expertise along the way.

You may not trust your others to do the task well enough and fear that, if they don't, you will be held accountable by your boss. On the other hand, you may fear that others will do a better job than you can—i.e., upstage you in front of others.

You may not understand your job enough to know what or how to delegate. Without adequate preparation, you may be more accustomed to doing than delegating.

Your staff, volunteers, and volunteer station staff may lack confidence in their ability to do the job you want to delegate to them. They may also fear criticism from you if they don't perform well.

Your others may lack incentive or initiative to do the job. They may not perceive any reward for or benefit from taking on additional responsibility.

## What To Delegate

Delegate things that don't require the skills or background that you and only you have. Delegate not only the "easy" activities (paperwork, routine tasks) but also some of the "tougher" ones that will help your staff and volunteers use their skills. Some possibilities may include:

<i>Paperwork</i>	Reports, memos, letters, etc.
<i>Routine tasks</i>	Updating volunteer records; following up on potential volunteer inquiries
<i>Tasks with developmental potential</i>	Co-facilitating a workshop; public developmental potential speaking/media interaction opportunities; representing the project at community meetings; leading a team of other volunteers

When you consider opportunities to delegate, make certain that the tasks are related to project goals and/or volunteers' personal development goals so you don't inadvertently take volunteers away from their direct service assignment.

## Signs that you may be delegating too little:

Taking work home

Falling behind in supervisory work

Feeling continual stress or pressure

Rushing to meet deadlines

Responding to staff or volunteers seeking your approval before acting

(Do any of these strike a familiar chord?)

## What Not To Delegate

As a rule, don't delegate anything for which you and only you have the skills or background—or the organizational authority. This might include:

- Personnel matters* Hiring, firing, disciplining, counseling, etc.
- Confidential issues* Performance appraisals; conflict meditations; certain CNS paperwork such as time sheets
- Crises* There is no time to delegate!
- Activities assigned* For example, an assignment from your boss to sit on a committee (you should not delegate such responsibility to someone else unless you have permission).

## Steps in Delegating

### Step 1—Explaining why

Explain why you need to delegate the task and why the person was selected. By doing this you are helping them to see “the big picture” and understand the importance of the task. You also make the person feel valued by the team and/or organization.

### Step 2—Setting objectives

Set objectives that define responsibility, scope of authority, and deadlines. The objectives should state the end result for which the volunteer or staff member will be held accountable. Authority means the right to make decisions, issue orders, and utilize resources. Supervisors have a certain scope of authority over their projects, and when they delegate they pass some of their authority along. How much authority you decide to give another person will depend on two things: the person's capability and the difficulty of the task. Never give away more authority than you have been delegated.

### Step 3—Developing a plan

Develop a plan with the volunteer. Be sure to identify the resources the volunteer will need to meet the objective and give the volunteer the authority to get needed resources. If other people are involved in the task or its outcome, let them know of your intention to delegate. Don't impose your own way of doing the task on the volunteer's plan but rather base your input on the capability of the volunteer (delegee): If the volunteer is highly capable, let him or her develop and carry out the plan with minimal help from you. If the volunteer is somewhat tentative about his or her ability, provide more guidance and oversight. Remember that part of your plan may be to train the volunteer in some aspects of the task.

### Step 4—Checking progress

Establish monitoring checkpoints. Even though you give the volunteer a specific deadline for finishing the task, it is useful to check progress at predetermined points along the way. The basic idea is to communicate with the volunteer in some regular, agreed-on mode—e.g., via meeting, phone call, memo, visit, or report. As with planning, the more capable the volunteer, the fewer the checkpoints needed.

### Step 5—Evaluating performance

Hold the volunteer accountable. Generally, workers perform better when their performance is measured and evaluated. Following the rules (in Chapter 1) for good performance feedback, you should assess the volunteer's work at each checkpoint and give praise or pointers as appropriate.

## Delegation Summary: Rules To Remember

### 1. Once the task has been delegated, don't "hover".

When you delegate, your role changes from doer to enabler, clarifier, answer person, resource provider and/or advisor. The more you hover, the less volunteers or staff members feel that they truly have the responsibility to do the task. If you hover, you will still spend time making sure the task gets done properly (i.e., YOUR WAY!) They will not develop self confidence, you will not perceive them as competent (because you are still spending too much time on the task), and you will rightly be perceived as a micro-manager.

### 2. Effective delegation is built on trust.

Trust builds slowly but can be destroyed quickly.

### 3. Effective delegation can be a great developmental tool.

Volunteers and staff must not perceive delegation as one test after another. A stretch is good, but you have to calibrate their limits carefully. If they fail frequently, they are likely to remember only the failures and avoid responsibility and authority in the future.

### 4. Abdication of responsibility can occur under the guise of delegation.

Delegation can amount to abdication of responsibility when you give little task definition or unilateral directions with no dialog, do not make yourself available to the employee, provide no oversight or follow-up, and basically forget the task, leaving the volunteer or staff member with virtually no support.

### 5. Confidence in volunteers allow you to let go of a task.

Delegating well means that you never forget about the task...only your role in its completion changes.

# Managing Time

## Why You Do It

**T**ime is one of the supervisor's most precious resources. There's too little of it; other people are always trying to steal it from you; and though you know it's scarce, you squander it! When supervisors try to meet unrealistic deadlines, whether self-imposed or set by others, they put unnecessary stress on their minds and bodies. Over time, stress may negatively affect not only job performance but health as well. Timely planning of your priorities on a weekly and daily basis will diminish stressful situations and give you greater control over how you carry out your roles and responsibilities. Effective time management means getting as many important tasks accomplished as possible, while maintaining the flexibility to meet members' emerging needs.

## How You Do It

One of the first things you can do on the road to effective time management is to consider the ways in which you currently waste time. It's easy for us to blame others for wasting our time—e.g., “My boss makes me attend useless meetings.” But, if we take a hard look at ourselves, we will probably find that there are just as many internal as external reasons for wasting time. Here's a list of the most common ones:

- Unexpected assignments from your boss
- The inability to say no
- Trying to do too much for too many people
- Too many meetings
- Unclear priorities
- Competing demands
- Too many phone calls



*If you have a lot of things to do, get the nap out of the way first.*

—8 year old

- Junk mail
- Lengthy socializing
- Unrealistic deadlines
- Can't see the top of your desk
- Waiting for upper management to approve routine decisions

To remedy time pressures created by external circumstances, you need help from others around you. For example, volunteers or staff can be asked to think through the desired outcomes of a meeting before it begins. If your boss often interrupts you, you can try to establish regular morning and afternoon times for checking in with him or her and have a list of things the two of you need to discuss.

To deal with internal factors that cause you to waste time, such as procrastination or trying to do too much for too many people, you must look inward and find logical ways to order your work and organize yourself. Here are several guidelines to help you meet the challenges of managing time:

1. Know where your time goes. We can often feel exhausted at the end of the day but still wonder if we got any meaningful work done. This feeling may be a sign that you are doing (taking action) without planning. Make yourself aware of how you currently spend your time by keeping a detailed log of your activities for at least a week.
2. Plan a week at a time, then make daily adjustments. If you only plan daily, your tendency will be to do busy work and respond to crises. A weekly plan provides a larger framework in which to identify and schedule high priority activities such as those we discussed earlier—planning, building relationships, crisis prevention, reflection time, and so forth. You can put these high-priority activities on your schedule, fill in part of the remaining time with less urgent or important tasks, and still leave time for unexpected events. Then, as each day unfolds, you make adjustments for the unexpected events as they relate to your high priorities.

Most people adapt planning formats to suit their own situation and style. In your Tool Kit, we include samples of

weekly and daily planning logs. Whatever tools you select to organize your information, make sure they are portable enough to carry with you as you travel from work site to meetings to home.

3. Learn to say no (graciously) to activities that are not among your high priorities. Sometimes you don't have a choice in such matters but, more often than not, people let themselves be "talked into" joining committees, giving presentations, or other activities that are praiseworthy but not necessarily important in the context of their longer-range goals. Learning to say no may also help you achieve a healthier balance between your professional and personal lives.
4. Do important tasks during your "prime-time" hours. Most people function best in the morning hours but a few do better a little later in the day. Figure out when your high- and low-productivity periods are and plan accordingly. Doing too many tasks at once is often a result of having unclear priorities.
5. Schedule "open time" instead of an "open door." Volunteers and staff need access to you, but that doesn't mean you always have to be on call and for unlimited time. When they know that you are available to them during certain time frames for 15- to 20-minute visits, they tend to be more thoughtful and focused about what they want to discuss. Of course, there will always be more serious situations that cannot be accommodated by an open-time policy.
6. Use available technologies. Make sure people have an effective way to leave you messages when you are unavailable. Written notes, voice mail, and e-mail are all possibilities. Use your own voice mail and home answering machine to leave yourself reminder messages. Written memos provide a "paper trail" for documenting decisions and plans, but be aware that they also take time.
7. Be phone smart. Most supervisors and managers regard the phone as a classic and chronic time waster. If you get a lot of phone calls, you may find it helpful to limit phone conversations by telling callers you have only a few minutes before you have to begin a meeting.

8. Delegate appropriately. If it takes you more than two days to catch up after you've been away from your office for a week, then you probably aren't delegating enough.
9. Focus on results. Supervisors often look at what needs to be done rather than the results to be achieved. To avoid getting caught up in operational details, it is important to state goals in clear, measurable terms that relate to outcomes, not just processes and procedures. If you are delegating appropriately and empowering your volunteers and staff, then you can and should hold them accountable for what they accomplish, not just how they work.
10. Take time off. Some supervisors believe that their project will fall apart if they leave for longer than a couple of days. Maybe it will, but so will you if you never get away to relax and change the scenery. Stress is a real and potentially hazardous factor.

# More in the Life With Olive...



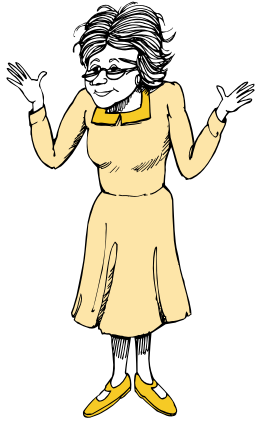
Back to our friend and colleague, Olive. What can we suggest she do to manage her time better? Here are a few ideas:

serves as a backup list if the agenda book should get lost.

1. Olive should keep an eye on how long it takes her to settle in and get started in the mornings. If she habitually takes half an hour in the mornings before she begins any meaningful work, then other people around her may follow her lead.
2. Olive appears to be responding to things as they happen. She needs to set aside time every week and every day to make and update her plans for accomplishing priority tasks.
3. There are indications in the case study that Olive has trouble keeping track of and accessing important information: she writes herself notes on several to-do lists; makes mental notes of important items; and she still doesn't prioritize her day. Olive needs to consolidate all her scheduling notes in two places—for example, an agenda book and a desk calendar. The agenda book is portable; the desk calendar shows the week at a glance and also
4. Olive's offer to bring Paul the manual on team building activities is a good example of trying to be helpful at one's own expense. Olive would save herself time and trouble by suggesting that the volunteer she loaned the book to give it to Paul directly.
5. It would help if Olive delegated responsibilities more often. For example, Max can call the library himself about the delivery program.



# Planning and Managing Meetings



## Why You Do It

**M**eetings are one of our primary planning tools. We develop, revise, and communicate plans during meetings. Meetings are also the main means of staying in touch with volunteers and co-workers and a primary venue for making decisions or gathering information to inform decision-makers. As a project director, you may call meetings with your volunteers on a weekly, bi-weekly, or even monthly basis. Your agenda may look something like this: sharing experiences at volunteer stations, generating new ideas about how to accomplish project goals, discussing tough problems at the volunteer stations, and so on. In addition to your sessions with members, you also have other meetings to attend—meetings with agency partners, community groups, and staff colleagues, to name a few. Considering how much time and energy is devoted to meetings, it is amazing how few of us are truly effective meeting managers!

## How You Do It

Good meetings involve three phases of activities: preparation, running the meeting, and follow-up. As you might guess, the better you prepare the more smoothly your meeting will run, and the more smoothly your meeting runs the easier the follow-up becomes. The following outline provides a simple guideline for managing most types of meetings.

### Preparation

- Clarify the purpose of the meeting; what is the overall goal or reason for bringing these people together?
- Determine who should attend the meeting. Check the list again after you've developed the agenda.

- Develop the agenda. Solicit suggestions or pertinent information from others as necessary.
- Prioritize the agenda, putting the most critical items highest on the list.
- Organize the agenda in terms of
  - What the issue is,
  - Who has responsibility for leading the discussion of each issue,
  - How much time is allocated for each issue, and
  - What outcome is expected in relation to each issue—e.g., a decision, common information, list of options, recommendations.
- Identify and announce, with lead time, any preliminary work that needs to be done by people attending.
- Let all attendees know the time, place, and duration of the meeting in writing; and clarify any special roles you may want them to assume during the meeting.

## Running the Meeting

- Start the meeting on time.
- State the purpose of the meeting.
- Present the agenda and adjust if necessary.
- Introduce meeting participants and explain their roles and relations to the issues on the agenda.
- Introduce any visitors and explain why they have been invited.
- Manage the process of the meeting:
  - Keep people on track.
  - Work from the agenda.
  - Check with the group to see that each item has been completed.
  - Manage the time spent on each item.
  - Keep notes on flipcharts if possible (a visible record helps the group focus on the task, eliminate repetition, achieve clarity, and review complete notes for analysis and decision making).

- Review the action items that were generated in the meeting before adjourning.
- Critique the process of the meeting:
  - How well did the meeting go?
  - How well did we work together?
  - What could be done to improve the next meeting?
- If the leadership is being rotated, identify the leader for the next meeting.
- Decide and confirm the date, time, and location of the next meeting.
- Thank participants and adjourn the meeting on time. (Ending ahead of time is great, too!)

### Follow-up

- Prepare and distribute the minutes of the meeting within three days.
- Be sure that anyone who missed the meeting is informed of decisions or actions taken that will affect them or issues that they will be responsible for handling at the next meeting.
- Take a deep breath and start the process all over again!

## Rotating Roles in Meeting Management

If you are going to be conducting regular meetings with the same group of people, you can encourage leadership and share responsibility by using a management technique called “rotating roles.” In rotating roles, you select or ask four people to volunteer for the role of facilitator, timekeeper, recorder, and process observer for each meeting. At the end of every meeting, four more people sign up to perform the same roles the next time. Group members continue rotating through the roles and, over time, polish their skills in meeting management. The roles can be briefly defined as follows:

The **FACILITATOR** runs the meeting, working through all of the items on the agenda as productively and efficiently as possible. The facilitator keeps the group focused, ensures everyone’s

participation, and manages people's "air time." (As supervisor, you work one-on-one with the facilitator ahead of time to make sure she or he understands the meeting purpose, the agenda, and the desired outcomes.)

The TIMEKEEPER acts as an alarm clock, not as a judge. If a given agenda item needs more time, the facilitator negotiates that with the group. If the group decides to allocate additional time, the timekeeper "resets the clock" as necessary. The timekeeper stays aware of the time at which the meeting is to end and reminds the group to save time for the process observer's report.

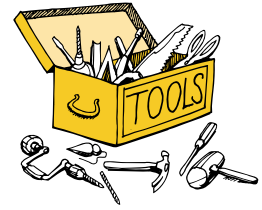
The RECORDER'S job is to write down ideas and information generated by the group so everybody can see it and read it. Before the meeting, the recorder makes sure newsprint, markers, and other needed supplies are in place. She or he does not usually take part in the discussion except as necessary to capture what someone said (e.g., "Dave, have I got what you said?" or "Could you repeat that, Leticia? I missed part of it.").

The PROCESS OBSERVER watches (like a camera, without judgment) how the members work together and how the facilitator, recorder, and timekeeper perform their respective roles. At the end of the meeting, the observer shares key points with the group e.g., "Ron, you did a good job facilitating the meeting today by keeping us on track and encouraging all of us to express our opinions about the community clean-up idea; once we finished that agenda item, I noticed that the folks on this side of the table withdrew and didn't participate in the remaining discussion....," etc.

#### REFERENCES

Pages 23 through 24 adapted from: "Managing Time Effectively," by Roger Ritvo in *Managing in the Age of Change*, eds. Roger Ritvo, Anne Litwig, and Lee Butler, New York: NTL/Irwin Professional Publishing, 1995.

## 25 Reasons to Plan



PAGE 1 OF 1

1. Focus effort where action is needed and productive.
2. Avoid the “business as usual” trap.
3. Maximize use of existing resources.
4. Uncover new resources.
5. Reflect and incorporate changes in the real world.
6. Create a road map to reach goals.
7. Make it easier to check progress and results.
8. Bring problems into manageable focus.
9. Help make goals clearer, more solid, and more achievable.
10. Aid in establishing priorities.
11. Help identify milestones.
12. Establish evaluation criteria and baseline.
13. Galvanize forces for action.
14. Develop clear choices and alternatives.
15. Help minimize confusion and frustration.
16. Improve communication and reduce conflict.
17. Sustain commitment.
18. Spotlight basic assumptions for re-examination.
19. Help control events instead of letting events control.
20. Check perceptions of problems against realities.
21. Act and prevent more, react and control damage less.
22. Focus on results rather than process.
23. Develop shared agenda for the future.
24. Solve problems and improve conditions.
25. Deal more effectively with contingencies and emergencies.

# Sample Project Planning Form



PAGE 1 OF 2

SERVICE PROJECT NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

SERVICE PROJECT MANAGER: \_\_\_\_\_

PRIMARY GOAL: \_\_\_\_\_

\_\_\_\_\_

OBJECTIVE 1: \_\_\_\_\_

\_\_\_\_\_

Task/Activities: _____	By Who: _____	By When: _____
------------------------	---------------	----------------

\_\_\_\_\_

\_\_\_\_\_

Checkpoints: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

OBJECTIVE 2: \_\_\_\_\_

\_\_\_\_\_

Task/Activities: _____	By Who: _____	By When: _____
------------------------	---------------	----------------

\_\_\_\_\_

\_\_\_\_\_

Checkpoints: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Sample Project Planning Form

CONTINUED 2 OF 2

## OBJECTIVE 3

Task/Activities:

*By Who:*

*By When:*

Checkpoints:

RESOURCE NEEDS:

APPROXIMATE BUDGET:

APPROXIMATE DEADLINE:

CONTINGENCY PLANS:









## Facilitative Behaviors

### *What they are*

Facilitative behaviors are actions anyone takes to make the meeting run smoothly.

Preventions are facilitative behaviors done at the start of or during the meeting that prevent the meeting from getting off track.

Interventions are facilitative behaviors done during the meeting that help get the meeting back on track.

### *Why they are important*

Facilitative behaviors are tools that everyone in the meeting can use. By using them, everyone shares the responsibility for making the meeting a success.

## I. PREVENTIONS

### *At the beginning of a*

#### *meeting get agreement on*

- Desired outcomes
- Agenda
- Role
- Decision-making method (including fallback method if consensus)
- Ground rules

### *During the meeting*

- Make a suggestion on how the group could proceed (a process suggestion)
- Get agreement on how the group will proceed (a process agreement)
- Listen as an ally
- Educate the group (process commercials)
- Ask open-ended questions
- Be positive—encourage participation

## Conducting Effective Meetings

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CONTINUED 2 OF 4

### Sample Ground Rules

*A sample of ground rules to be used in meetings*

- We're all colleagues—let's respect each other
- It's OK to disagree
- Listen as an ally
- Everyone participates, no one person dominates
- Honor time limits

### Using Preventions

*Get agreement on desired outcomes, agenda, roles decision-making, ground rules*

- Review and check for agreement on important meeting start-up items:  
“Before we get into our agenda for today, I'd like to make sure we all agree on how we're going to work together...”

*Make a process suggestion*

- Suggest a way for the group to proceed:  
“I'd suggest looking at the criteria before trying to evaluate options.”

*Get agreement on how the group will proceed*

- Check for agreement on a process that has been suggested:  
“Is everyone willing to identify criteria first?”

*Listen as an ally*

- Listen to understand before evaluating.
- Listen positively, not as an adversary.  
“Let me be sure I understand your view of the problem. You're saying that.... Is that right? Now I'd like to express my view.”

*Educate the group (process commercials)*

- Heighten the group's process awareness through education:  
“There's no one right way to solve a problem. Which way do you want to start?”

*Ask open-ended questions*

- Ask a question that doesn't have a single right answer:  
“What do you think we should do?”  
“Say more about your idea for tracking errors.”

## Conducting Effective Meetings

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CONTINUED 3 OF 4

*Be positive—encourage participation*

- Exhibit a positive, win-win attitude:  
“I know this issue is quite emotionally charged, but if we take our time and work our way through the problem, I’m sure we can find a solution we can all live with.”

## II. USING INTERVENTIONS

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*Boomerang*

- Return a question to the person who asked it or to the group so that the leader or facilitator does not take responsibility for all questions:  
*Group Member:* “I don’t like the track we’re taking here.”  
*Leader:* “What do you think we should be doing?”

*Maintain/regain focus*

- Make sure everyone is working on the same content, using the same process, at the same time:  
“Let’s stay focused on identifying problems. Are we all together?”  
“Just a moment, one person at a time. Joe, you were first, then Don.”

*Say what’s going on*

- Identify something that isn’t working—i.e., get it out in the open so the group can deal with it:  
“It’s very quiet here. What does the silence mean?”

*Avoid process battles*

- Prevent lengthy arguments about which is the “right” way to proceed. Point out that a number of approaches will work and get agreement on one to start.

*Enforce process agreements*

- Remind the group of a previous agreement:  
“We agreed to brainstorm, but you’re starting to evaluate the ideas. Would you hold onto that idea for now?”

## Conducting Effective Meetings

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CONTINUED 4 OF 4

*Accept, legitimize, deal with, or defer*

- Deal positively with difficult people or situations that might get a meeting off track. Accept an idea without agreeing or disagreeing. Legitimize it by writing it on the group memory. Then decide as a group if the issue or idea is more appropriately dealt with here or deferred to another time. Record ideas or issues that are deferred and agree on when they will be addressed:

“You’re not convinced we’re getting anywhere? That’s OK, you may be right. Would you be willing to hang on for 10 minutes and see what happens?”

“Thanks for raising this issue that wasn’t on the agenda. Do we need to address that now or should we put it on the issues list for our next meeting?”

*Don’t be defensive*

- Arguing back when criticized will only provoke more argument. Accept negative comments and boomerang the issue back to the individual or group:

“I cut you off? I’m sorry. Please continue.”

“You think I’m pushing too hard? (lots of nods) Thank you for telling me. How would you like to proceed from here?”

*Use body language*

- Reinforce words with appropriate body language. Ask for ideas with palms open. Regain focus by standing up and moving to the middle of the room.

*Use humor*

- Make a joke to relieve the tension. Be sensitive enough not to joke at someone else’s expense.

*Protect others from personal attack*

- Intervene to stop one person from verbally attacking another:  
“Joe, you’ve criticized Sue several times in the last few minutes. I’d like to hear what she has to say as well as hearing your view.”