

# 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 members/volunteers. And you will be more likely to achieve a healthy balance between the two critical National Service supervisory functions—developing members/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;
- Setting Priorities and Delegating Tasks;
- Managing Time; and
- Managing Meetings.



# Supervisor's TOOL KIT

(These tools begin on page 4 31)



## 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 ...



Betty is an AmeriCorps supervisor for 12 members in their fourth month of service. It is Tuesday morning at 8:30 a.m., and Betty arrives at her office. She stops to chat for ten minutes with folks in the office next door, gets coffee, and settles in at her desk. At 9:00 a.m., she begins work.

On her desk she finds a letter from her boss, Martin, with an agenda for next month's training. The agenda highlights the two-hour session on effective community presentations she volunteered to do but hasn't started to plan yet. Also included in Martin's package are two other notes. The first says that three of her members (Jeff, Imani, and Renny) turned in their time sheets late again. Betty makes a note to call them later and discuss this recurring problem. She sighs.... The other note from Martin is a memo saying he'd like her to give him a brief project plan for the Resource Mother's Day Fair scheduled in April. Even though the project is two months away, Martin and Betty both know the fair is strategic in terms of community relations and the public's view of the Resource Mothers project. Betty tacks the memo to the bulletin board over her desk.

As Betty begins to move some of the books on her desk, she notices a note stuck on the underside of one of them. It's a reminder to herself to call three members (Kay, Joel, and

Gary) she has not heard from since she saw them at last month's training session.

Betty looks at her in-box and immediately notices something from Ayesha, one of her members. It's a plan for the team project scheduled for Thursday and Friday. Betty reads it immediately and thinks it looks good. She is excited about Ayesha leading the project because of the excellent job she did coordinating another project last month. Although she has a lot of faith in Ayesha, Betty herself wants to participate because she knows so much about the issues being addressed. This team project is scheduled at The Options Center, her favorite organization, and she is looking forward to spending two days there making contacts and seeing friends. Looking over Ayesha's plan, she thinks of several great ideas to enhance the project. She grabs a pencil to make some notes to herself.

Betty gets a phone call from one of the agency partners, Christine, who has a question about the invoice they received for their share of the members' stipends. Christine says she does not know who else to call. Betty doesn't know anything about this—it's strictly Dora's domain. She offers to call Dora at the main office and then call Christine back with an answer.

On her voice mail is a message confirming a meeting at 3:00 p.m. that day that she had forgotten to write in her calendar. The meeting is with two key community leaders (Malcolm and Sarita) with whom her program has been trying to partner since last fall. She writes it in her calendar and writes a note reminding herself to look for her agenda and materials from a similar meeting two weeks ago. The next message is from Marcia, a member who was going to attend this meeting with Betty. Marcia's car has broken down, and she won't be able to make the meeting unless Betty can pick her up. Unfortunately, Betty has to pick up her son from day care by 5:30 p.m. and might not make it across town in time.

Other messages include a call from the local community cable station about filling a vacant time slot on tomorrow's "Around Town" segment and a call from the local community college financial aid officer with whom she would like to do a recruitment

pitch for next years' members. The last message is from Keith, telling her about how well his presentation went with the youth committee at his neighborhood community center last night.

While listening to her messages, Betty receives a fax from her boss Martin. It's an outline of the things he would like her to cover in her next report. He is requesting an evaluation of the project and member development to date, complete with specific examples, for his quarterly report to CNCS. He wants it by Friday! She looks in her calendar and sees a reminder note she overlooked. Now she will have to try to jog her memory about major project events and member accomplishments to include in the report. She wonders if she kept anything written from past meetings....

Betty glances at the clock. It is now 10:00 a.m.



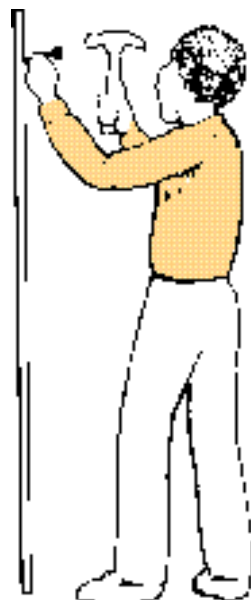
# Planning Work

## 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 members/volunteers, and you give them a vision for where they are going. Clear plans help members/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 your own success as a supervisor.

## How You Do It

Most National Service supervisors 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 projects which address the strategies of your agency and National Service. A program is defined as a set of activities which accomplish broad objectives over a relatively long period. A project is a more narrow set of activities designed to accomplish an objective within a relatively short time period. For example, you and your members/volunteers may be assigned to a three-year program for improving the



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

Unknown

environmental surroundings of public housing; within that program, specific projects may include graffiti removal, a cooperative vegetable garden, and restoration of an abandoned recreational park. In short, projects differ from programs in scope, time, and degree of complexity. 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.

Betty’s Draft Plan for the Resource Mother’s Day Fair (on the following pages) is a good example of a simple project plan. Although Betty hasn’t completed the plan, she’s made a good start identifying the major project components.

## 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 National Service supervisors 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. If you find collaborative planning with partner agencies to be one of your greatest challenges, you'll want to review Chapter 5, Supervisor as Community Partnership Builder.

## 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!**

**GOAL**

To expose the community at large to the accomplishments of the Resource Mothers' Program and its potential to meet needs that are not being addressed elsewhere.

**OBJECTIVE 1**

Conduct a 6-hour "Fair" on May 12 (the day before Mothers' Day) at the civic library atrium; program will feature presentations, games, exhibits, and an award ceremony, all led by AmeriCorps members and mothers participating in the program.

**OBJECTIVE 2**

Secure media coverage of the fair including pre-event PSAs, day-of-event spots on a local news channel, and a front-page article in the local newspaper.

**OBJECTIVE 3**

Have a minimum of three partner organizations attend and participate actively in the events of the Fair.

**Tasks**

**Objective 1**

Conduct Fair on May 12 at civic library atrium

TASKS/ACTIVITIES	WHO	BY WHEN
Book atrium space and make all arrangements for furnishings and equipment with library staff	Keith	3/15
Set up program committee composed of Betty, Ayesha, two other AmeriCorps members, and one representative from each of the partner organizations who will participate in the fair; chair the committee	Betty	3/20
Design overall program agenda and make assignments to activity leaders	Program committee	3/31
Hold orientation meeting with mothers' group to identify lead mother to serve on program committee and sign-up mothers for their preferred activities	Ayesha	4/7
Match up mothers with appropriate activity leaders	Ayesha	4/10
Get list of mothers' concerns and requests for preparation	Ayesha	4/10
Design activities; give written outline to program committee for review and comment	Activity leaders and mothers	4/15
Review/approve activity outlines	Program committee	4/20
Get equipment and supply lists from all activity leaders; acquire items or arrange with library to supply them; distribute/store items as appropriate	Keith	4/20
Draft program agenda, award certificates, and other formal written materials; get program committee's okay; make adjustments and produce final pieces	Jeanne	4/30
Practice activities/games, etc.	Activity leaders, mothers, with Ayesha	5/10

## Objective 1 Checkpoints

- Keith checks the site/supply needs list with Betty before contacting the library; reports to her on meeting with library representative; gets the go-ahead to make bookings.
- Betty uses the program committee as the main point of contact to inform and check on status of preparations (activities, materials, etc.); the committee meets twice in March, then weekly until the Fair date; the committee may schedule a rehearsal if necessary.
- Betty and Ayesha have weekly check-ins to discuss any problems relating specifically to the mothers.

## Objective 2

Secure media coverage of the fair

TASKS/ACTIVITIES	WHO	BY WHEN
Draft and send initial promotional piece to Channel 10, <i>The Chronicle</i> , and WXRT	Betty with Quentin	4/10
Do follow-up calls; if possible, schedule and have meetings with each media representative; get sign-offs	Quentin	4/20
Get firm commitment on pre-event PSAs; write and deliver announcements to media representatives	Quentin	4/25
Draft flyers; get approval and final print; set up distribution procedures through program committee	Quentin with Jeannie	4/25
Reconfirm day-of-event coverage; send schedule to media representatives; field questions, get ready for remote-site video	Quentin	5/7
Orient activity leaders and mothers to media presence and participation in the Fair; practice interviews with mothers.	Quentin with Ayesha	5/10

## Objective 2 Checkpoints

- All publicity information is approved by Betty before it is submitted to the media.
- Quentin keeps Betty informed by weekly e-mail and bi-weekly check-in meetings.
- April 30 meeting of the program committee reviews media commitments and determines alternative sources should be contacted.

## Objective 3

Have a minimum of three partner organizations attend

TASKS/ACTIVITIES	WHO	BY WHEN
Announce the Fair at the March coalition meeting and send faxes to other partners; get tentative okays from as many partners as possible	Betty	3/7
Follow up on initial commitments; get partners to assign representative to program committee; arrange for first meeting with program committee	Betty	3/15
Participate in program committee design meeting; take individual assignments to plan exhibits and other information exchange activities for the Fair	Partner Reps.	3/31
Plan exhibits, etc.; inform the program committee chair (Betty) about partner space, equipment, and other needs; give the program committee a preview packet of all materials to be distributed at the Fair	Partner Reps.	4/20

Continue listing other tasks and checkpoints

## Resource Needs for Project

Site to accommodate maximum of 200 people at a time

PA and multimedia systems (from library if possible)

Equipment and supplies for all activities, presentations, etc. (activity leaders will supply lists; AmeriCorps members and mothers' group will make as many of the items as possible)

Exhibit booths (five provided by the library; the rest provided by partners)

- Signs and decorations for entrance and general atrium area (check with library regarding restrictions)
- Paper stock for flyers, programs, award certificates, etc.
- Computer time in Graphics Department to use desk-top publishing.

## Contingency Plans

Library auditorium available in case of severe weather

Person designated to take still photos if Channel 10 a is no-show

Martin to serve as back-up for Betty

Ayesha and designated assistant to serve as back-ups for leading/participating in activities in case of illness or no-shows

If PSA's do not get out, Jeannie to mobilize Resource Mothers participants (i.e., AmeriCorps members, mothers, and kids) to increase flier distribution



# Setting Priorities and Delegating Tasks

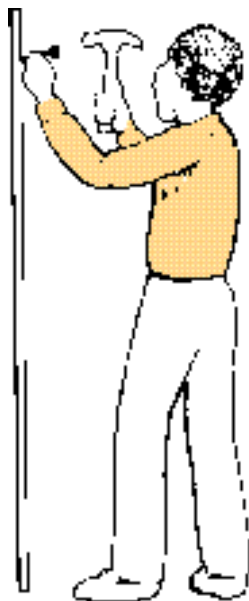
## Why You Do It

**S**etting priorities and delegating tasks go hand-in-hand for the National Service supervisor. First of all, supervisors 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 National Service is to develop members'/volunteers' capabilities. Properly handled, delegation will do just that. Members/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 members 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 National Service, 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 your priorities rather than the other way around. We’ll talk more about weekly and daily planning and time management later in this chapter.

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

Stephen Covey

Setting priorities is not something you have to do alone. You should regularly ask your director as well as your members/volunteers for their input. Checking in with your director may be particularly important if you have other projects and staff to oversee in addition to your National Service work. Balancing National Service-related tasks against other assignments can become confusing and problematic, and setting priorities becomes proportionately more critical.

### Delegation

As a National Service supervisor, you are responsible for achieving your project objectives through your members/volunteers. Delegation means assigning responsibility and authority to a member/volunteer or members/volunteers 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 members/volunteers. It's your job to get things done through members/volunteers and develop their expertise along the way.

You may not trust your members/volunteers 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 members/volunteers 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. Maybe you were a National Service member/volunteer yourself and then got promoted to supervisor.

Without adequate preparation, you may be more accustomed to doing than delegating.

Your members/volunteers 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 members/volunteers 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 members/volunteers develop their skills. Some possibilities may include:

<i>Paperwork</i>	Reports, memos, letters, etc.
<i>Routine tasks</i>	Checking equipment at a project site; securing and replenishing project supplies; morning calisthenics for crew teams
<i>Tasks with developmental potential</i>	Co-facilitating a workshop; public developmental potential speaking/media interaction opportunities; representing the project at community meetings
<i>Solving members'/volunteers' problems</i>	Helping members/volunteers learn how to solve their own problems rather than doing it for them

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

### Signs that you may be delegating too little:

Taking work home

Performing member/volunteer tasks

Falling behind in supervisory work

Feeling continual stress or pressure

Rushing to meet deadlines

Responding to members/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 mediations; 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 a member/volunteer unless you have permission).

## Steps in Delegating

### Step 1—Explaining why

Explain to the member/volunteer why you need to delegate the task and why she or he was selected. By doing this you are helping the member/volunteer to see “the big picture” and understand the importance of the task. You also make the member/volunteer 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 member/volunteer 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 to the member/volunteer. How much authority you decide to give your member/volunteer will depend on two things: the capability of the member/volunteer 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 member/volunteer. Be sure to identify the resources the member/volunteer will need to meet the objective and give the member/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 member's/volunteer's plan but rather base your input on the capability of the member/volunteer (delegee): If the member/volunteer is highly capable, let him or her develop and carry out the plan with minimal help from you. If the member/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 member/volunteer in some aspects of the task.

### Step 4—Checking progress

Establish monitoring checkpoints. Even though you give the member/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 member/volunteer in some regular, agreed-on mode—e.g., via meeting, phone call, memo, visit, or report. As with planning, the more capable the member/volunteer, the fewer the checkpoints needed.

### Step 5—Evaluating performance

Hold the member/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 member's/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 members/volunteers 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!) Members/volunteers 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.

Members/volunteers must not perceive delegation as one test after another. A stretch is good, but you have to calibrate members'/volunteers' 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 member/volunteer with virtually no support.

#### 5. Confidence in members/volunteers allows you to let go of a task.

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

# More in the Life of Betty



Let's check in on Busy Betty, our not-so-organized supervisor in the case study at the beginning of this chapter. If Betty asked us for help on planning, setting priorities, and delegating tasks, we might offer the following suggestions:

1. The fact that Betty hasn't heard from three of her members since last month's training means, she doesn't have relationship building with members high enough on her list of priorities. She needs to plan ways to communicate regularly with them—e.g., through a combination of monthly visits and weekly scheduled phone calls. Since Betty's members work at different sites, she might consider conference calls to link them together so they can share experiences and help each other.
2. Betty doesn't seem to place a premium on planning activities either. She is in a precarious position with her quarterly report and generally seems to be responding to daily details instead of looking at the larger picture. She needs to design a plan for systematically gathering and storing the information that goes into the quarterly report. She could delegate some of this responsibility by having members, on a rotational basis, write a "weekly highlights report."
3. Betty seems to recognize the value of delegation, as evidenced by her assignment of the team project to Ayesha. But she needs to be careful about imposing her own ideas on Ayesha, especially if Ayesha's plan "looks good." Betty also needs to consider that, if she decides to attend the entire two-day program at The Options Center, Ayesha may interpret this as a sign of "no faith." There are other compelling reasons for Betty to reconsider her decision to attend the entire program: She doesn't have the time, and she is confusing relationship building with "hanging out" with friends. An alternative might be for Betty to set aside one afternoon to attend the project. This would give her an opportunity to observe Ayesha's facilitation, and she could stay around to socialize with friends into the evening.
4. Betty has several other possible opportunities to delegate meaningful tasks to members. If Keith performed well in his presentation at the youth center, Betty should consider asking him to facilitate or at least co-facilitate the two-hour session on "Effective Community Presentations" at next month's training. Keith and Ayesha might be able to help Betty put something together for the

“Around Town” television segment as well as for the recruitment pitch to the community college financial officer.

5. Betty may need to establish clear procedures and rules for how members should handle their time sheets. Regular contact by Betty with members would also diminish their tendency to slack off.
6. Contingency planning may solve problems like how to get to an important

meeting when the car breaks down.

Members who know what transportation modes are available and reimbursable will be more likely to take the initiative to get to the meeting.

[We’ll save the rest of our suggestions to Betty until we’ve discussed time management.]

# Managing Time

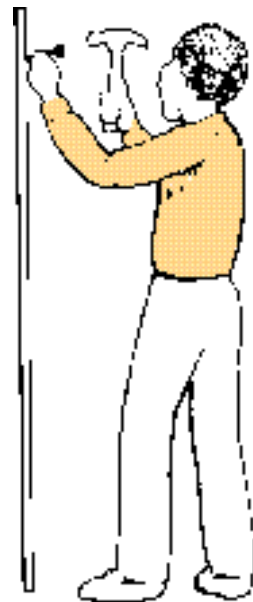
## Why You Do It

**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'/volunteers' 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



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

—8 year old

- Too many phone calls
- 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, members/volunteers 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." Members/volunteers need access to you, but that doesn't mean you always have to be on call and for unlimited time. When members/volunteers 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 members/volunteers, 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.

# Again, with Betty's Life ...

---



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

1. Betty 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. Betty 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 Betty has trouble keeping track of and accessing important information: She writes herself notes on Post-Its and then loses them; she forgets to write down important items like meeting dates; she can't remember where she may have put notes from previous meetings; and she doesn't refer to her agenda book notations often enough. Betty 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 serves as a backup list if the agenda book should get lost. Betty also needs to improve her filing system for maintaining notes and other materials from past meetings and project events.
4. Betty's offer to call Dora on Christine's behalf is a good example of trying to be helpful at one's own expense. Betty would save herself time and trouble by suggesting Christine call Dora directly to get an answer to her question about the invoices.
5. It would help if Betty kept a file of previous public relations pieces, statistics, and other useful information for quick reference when unexpected media and recruitment opportunities come along.



# Planning and Managing Meetings

## Why You Do It

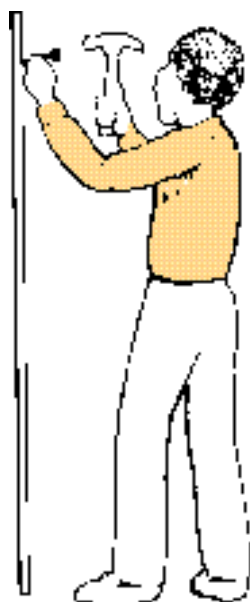
**M**eetings are one of our primary planning tools. We develop, revise, and communicate plans during meetings. Meetings are also the main means of staying in touch with members/volunteers and co-workers and a primary venue for making decisions or gathering information to inform decision-makers. If you work as a supervisor in a crew-based program, you probably hold meetings daily. Your meeting agenda may include reflection, planning for the next assignment, clarifying roles, solving problems that come up, and so forth. If you are in an individual-placement program, you may call meetings with your members/volunteers on a weekly, bi-weekly, or even monthly basis. Your agenda may look something like this: sharing experiences at work sites, generating new ideas about how to accomplish program goals, discussing tough problems at the project sites, and so on. In addition to your sessions with members/volunteers, 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/volunteers 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/volunteers 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 427 through 429 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

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

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:







# Conducting Effective Meetings



PAGE 1 OF 4

## 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

---

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

---

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

---

*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

---

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.”