THRIVE

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HELPING NON-PROFITS GROW

Busting the Busy Trap

10th October 2023

Handouts & Templates

Contents

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Busting the Busy Trap

The following handbook includes extra process information and templates shared during the conference session. If you have any questions, or would like any more information, do get in touch.

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Constructive Evaluation

Description: Constructive Evaluation is a practical and simple tool for evaluating or reviewing **anything** you would like to evaluate or review. It's really helpful to have a structured process to help review, learn and improve.

In the context of Busting the Busy Trap it's especially important as we often overlook, or don't focus on the things we are doing well. Instead, we focus on the things we haven't done well or haven't achieved.

Why use Constructive Evaluation?

- Breaks big issues down into bite-size chunks, for prioritised and focused problem-solving and continuous improvement.
- Looking for positives first enables open minded evaluation of the current situation which can help get perspective.
- Ensures we capture and celebrate what has worked well, our tendency is to jump straight to the gaps/issues/concerns and problem solve them to improve, the first step is as important.
- When things can feel like hard going on a daily and weekly basis, identifying the wins, what is working well, can keep you motivated and moving forward.
- The process ensures the review is constructive – focusing on what is working well first and framing gaps/issues/concerns with 'How to…' keeps things constructive.

Constructive Evaluation - Steps

1. **Write down your area of focus, what are you reviewing or evaluating?**
   - Ensure you are clear about what you are reviewing and you all have the same area of focus.

2. **Identify all the things that are working well. List as many positives as you can.**
   - Often when we review we jump straight to issues. To ensure the review is constructive, to evaluate open-mindedly, and to ensure 'what worked well' is ring-fenced and celebrated, **ALWAYS** start with positives.

3. **Identify gaps, issues or concerns**. Frame every gap, issue or concern with '**How to….**'
   - Reframing statements e.g. 'People didn't know what they were supposed to do' as 'How to ensure each team member knows exactly what their role is and what they have to do' changes the statement into a task as opposed to barriers that demotivate or overwhelm.
   - Framing statements as 'How to…' breaks larger issues down in the bite-sized tasks that we can then pick off one at a time for focused problem solving.
   - Using the language 'How to…' to frame task automatically kicks your brain into problem solving mode.

- You will need to make sure you constantly use the reframe 'How to…'

4. **Prioritise gaps/issue/concerns for problem solving.**
    - Work through each of the gaps/issues/concerns and problem-solve one at a time (that doesn't have to be all in one go, only focus on one gap/issue/concern at a time)
    - Vote for your top 3
    - Problem-solve each concern one at a time.
        i. When generating ideas to problem-solve the concern frame them with 'What you do is….'. Using that language to frame will help kick brains into specific and actionable mode, you are looking for specific and actionable ideas to solve the issue.
        ii. Generate 6 to 8 'What you do is….' Ideas, and then check to see if there are ideas that you can implement to solve this issue.
            → If yes, write those ideas up into a solution
            → If no, keep generating 'What you do is… ideas, and check again after 6-8 ideas
5. **Next steps**
    - Write up the next steps with actions if there are any (what will you do, who will do it, and by when).

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Stopping the glorification of busy

Do you glorify 'being busy'?

- ☐ When somebody asks you how you've been, do you ever answer with 'I've been busy' or 'frantic'?
- ☐ Do you ever use the phrase 'If you want something done ask a busy person'?
- ☐ Do you ever use being busy or having a busy day as an excuse for being late to an appointment or not getting something done?
- ☐ When making small talk, do you ever enquire about how busy someone has been? e.g. 'So, have you been busy?'
- ☐ When somebody tells you they've been really busy, do you ever respond with comments like 'that's good to hear' or 'better than opposite'?
- ☐ Do you ever find yourself telling people things like 'it's the first time I've sat down all day' or 'I didn't have a chance to stop for lunch'?
- ☐ Do you ever assume that the person who works the longest hours is automatically the hardest worker?
- ☐ Do you ever measure someone's contribution by how many different things / organisations / projects they are involved with?
- ☐ Do you ever use social media to express / complain about how busy you are?
- ☐ When you meet someone for the first time, do you ever start the conversation with 'So, what do you do'?

How do you measure up?

0 – 3 We'll let you off. Some of these things are so far ingrained in our culture, we don't even know we are doing it.

4 – 7 Watch it. While you might not admit it outwardly, you probably think 'busy-ness' is something to be worn like a badge of honour. In your world the busier you are, the more important you must be.

8–10 Stop it! Life is not a competition to see who is the busiest. Put down the pen and go have a sleep.

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Pareto Principle – The 80/20 Rule

It’s one thing to set boundaries and be committed to spending less time at work, but you still need to be able to achieve the same results or outcomes in a lesser amount of time. You do that by focussing on the things that make the biggest impact – and you get rid of all the fluff.

20% of the work you do (inputs) will create 80% of your outcomes.

In every area of your work there are things that have disproportionate results. Start measuring what works, focus on those and simply stop doing everything else.

How do you decide what 20% of your work to focus on?

1. **Identify** the key purpose for every activity you do - ask the lamb roast question
2. **Measure** the success of every activity. Is the activity achieving the result you want?
   How do you know?
3. If not: **Adapt**, change or tweak ways of performing the activity and measure the success.

   Still not achieving the results you want?
4. **Drop** it and focus on the activities that do help you achieve the results you want.

The 80/20 Rule: Assessing What Works and What Doesn't

Activity	Time Spent	Desired Outcome/s	How well is it achieving the desired outcomes? A - D	How do you know?
Writing and Distributing Email Newsletter to Stakeholders	5 hrs / month	Increased loyalty from current donors and supporters	B	After each newsletter distribution, an average of 3% of one-time givers sign up to regular giving through the email link.
Sending Press Releases to Local Newspaper	3 hrs / month	Increased awareness of our activities in the community	A	Often receive email and phone enquiries in the week following publication. Newspaper has started phoning us for comment on related stories.
Maintaining a Facebook Page	1 hr / month	Increased awareness of our activities in the community	D	Only 73 people like our page and most of those are staff or volunteers.

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Activity	Time Spent	Desired Outcome/s	How well is it achieving the desired outcomes? A - D	How do you know?

Delegation

Once you've narrowed down what work is actually worth doing – ask yourself:
What of these things can only I do well?

Then **delegate** the rest.

If you constantly ask yourself: ***Is this something someone else could do?***
You may be surprised by how many tasks you can give away.

We are not suggesting that delegating is easy. The more you practice it, the easier it becomes.

Overcoming Barriers to Delegation

It takes time to show people how to do what I need. It's quicker to do it myself.

- *Don't wait until it is urgent, get into a habit of training consistently and regularly vs. waiting until the job becomes urgent.*
- *Train me Tuesdays – buddy up your team and learn how to do part of someone else's job.*
- *Create an Operation Manual.*
- *At each staff meeting spend 5-minutes sharing skills and knowledge.*
- *Share your Daily Plan / Weekly Plan and ask where anyone would like to help, make yourself disposable.*
- *Depending on the task, write down the instructions/steps to do the job, it will take time to do it, and will save you time in the long run.*
- *Change your mindset, it's about investing time upfront so you can save time in the long run.*
- *Make delegation about making time to empower and engage your staff vs. something that is quicker to do yourself.*

Everyone else is 'busy' too. They don't have time to take on another task.

- *Get everyone in your team to do the IMAD 80:20 sheet.*
- *Swap tasks – if you have great skills in something (which means you can do it a lot quicker) offer to do that for someone who has great skills in something you need done, playing to both your strengths.*
- *Delegate consistently, so that the people you are delegating to build time into their day to manage the jobs they know will be coming their way.*
- *Have the conversation – you don't know what is on someone else's plate, they may be looking for jobs to do, or they may love to do the job you are asking them to take on, you won't know until you ask (let them know it is OK to say no, or to ask for help to prioritise what they are doing)*
- *Trust that people will tell you if they are too busy, don't assume that someone is too busy.*
- *Build time in your diary (the team's diaries) for catch up time / buffer time*

There is no-one with the skills or expertise to delegate the task to.

- *Connect with your local Volunteer Centre - https://www.volunteeringnz.org.nz/finding-volunteer-roles/volunteer-centre-network/ - there may be someone who is looking to volunteer, and they have the skills you need to help*

- *Ask your team for advice, here is the job, here's how it breaks down to bite-size chunk tasks, what is the best way to get it done? Who can help do what?*
- *Know your team well, what skills do they have in their role, what skills do they have outside their role – create a database of team skills*
- *Break down the task into bite-size tasks, you don't have to delegate the whole task, share different parts with the people who have the best skills to get it done.*

I've been let down so many times people who don't do the job properly or don't get it finished on time.

- *Ensure clear communication of what's expected in terms of deadlines and in terms of expectations and role descriptions. Be really specific.*
- *Break down the task into bite-size tasks with deadlines for each small task.*
- *Share priorities on the bite-size tasks for the person you are delegating too, if you are running out of time do X, Y and Z first.*
- *Set deadlines that are time specific e.g. 9:30am on Friday vs. just Friday. Leave a good amount of time between the deadline you set and the actual deadline.*
- *Have a reporting schedule and agree deadlines upfront.*

The person I delegate the task to will feel resentful for having to do 'my' job.

- *Frame the task, in your head and for the person you are delegating to, as an opportunity to grow and learn.*
- *At your team meeting share all the projects you are working on and ask if anyone is keen to get involved.*
- *Make sure when you delegate and the job is done that you share your appreciation, one of the things that makes people feel resentful is if they don't feel appreciated.*
- *Use as an opportunity to build team relationships and ensure that everyone is great at working together vs. working in their silos*

5 Tips for Effective Delegation

Delegate consistently

Get into the habit of questioning the relevance of every task you complete. Is this really the best use of my time? Is this something I want to be spending my energy on? Who else could do this task for me?

It often feels easier to do things yourself, and in the short term that may well be true. However, if you really care about the organisation you support it is important that other people develop skills and expertise to do the job as well. If you suddenly got hit by a bus they would need to learn how to do it, so they might as well learn now while you're still around to teach them.

By consciously analysing each task and slowly handing over small jobs piece by piece, you'll start to feel more comfortable with letting go and it will have positive impacts for your team as well. When you delegate tasks on a consistent basis, people feel trusted and valued for their contribution. They know they are not just there for emergencies.

Clearly Communicate Your Expectations

When do you need the task completed? Are there specific processes that need to be followed, or are you just looking for a result? What would success in this task look like to you?

If a specific process needs to be followed, make sure that the process is written down in an easy-to-use format and check for understanding *before* you walk away. It's much easier to clarify things at the beginning, than fix up the consequence of a misunderstanding at the end.

Balance Your Involvement

Once you have delegated a task, you need to be careful not to over-supervise otherwise you might as well be doing it yourself. Right from the start, agree on how often you will receive progress reports and how those reports will be made, and then find the balance between 'leaving them to it' and 'being available for support'.

Match tasks wisely

Before delegating any task, make sure you are matching the right person to the right job. What skills do they have? What are they passionate about? How have they demonstrated that they are capable of completing the task well? Will this task excite them or drain them? Do they have time to do the job well or are you adding unreasonable pressure to their workload?

Before you start on your crusade of delegation, find out from staff and volunteers if there is something they are particularly interested in taking up. Is there an area of your work that they are keen to explore?

As part of enabling everyone to get to know everyone better complete a skills matrix for the whole team. A skills matrix, like the one below, is a simple way to keep track of the skills you all have. You can even add elements to it that might be helpful to keep in mind e.g. add a column for….

- Things I love to do – My superpower!
- Skills I am looking to learn / master
- Skill I would like to learn if I have the opportunity

Regularly reflecting on the skills within the team will help identify any gaps that need filling.

When you are looking to bring new team members into your you can actively search for people with the required skills.

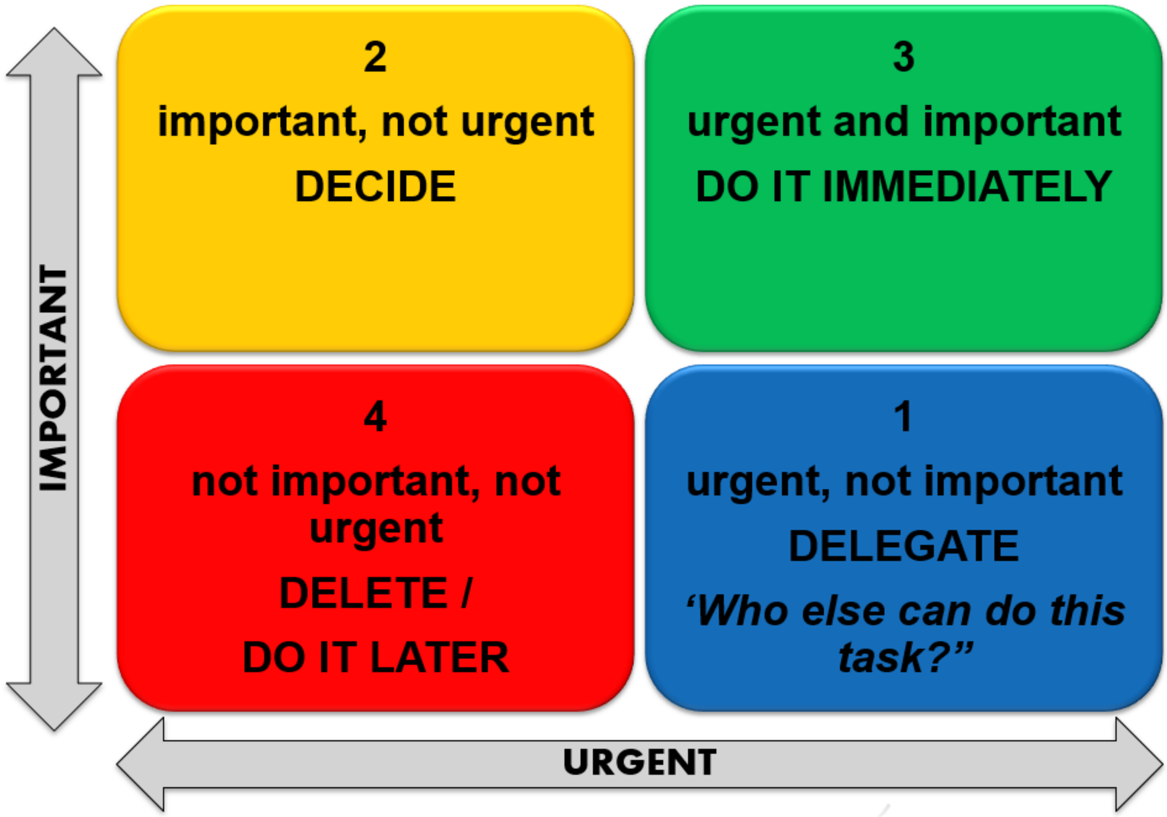
Skill/ Qualities ➡	Administration Skills	Copy writing skills	Event management skills	Interviewing skills	Fundraising Skills	Public speaking	Project management	Relationship building	Facilitation skills	Financial skills
Ideal Capacity	**8**	**10**	**10**	**5**	**10**	**10**	**10**	**10**	**5**	**8**
Jim	7	6	5	5	6	7	8	2	7	7
Mary	10	5	7	7	6	6	6	8	0	0
Peter	8	8	8	10	7	7	9	5	0	0
Paul	6	5	5	8	2	8	8	4	0	0
Margaret	8	7	3	3	10	5	5	10	4	0
Elizabeth	4	10	3	7	5	5	4	9	8	3
Tony	4	6	8	9	5	10	10	5	5	7
John	0	2	10	8	2	4	8	6	0	0

Maintain Accountability and Acknowledge Contributions

Even though you are delegating the task, as a manager you are still ultimately responsible for the overall success of the project. Be prepared to accept responsibility for any mistakes that are made, and instead of casting blame, work with the individual to debrief about what went wrong and how things could be done differently next time.

In reverse, when the project is complete and you are being praised for a successful outcome, make sure you publicly acknowledge and celebrate the contributions of others.

Prioritising tasks – Using the Eisenhower Matrix



- Use the Eisenhower Matrix to prioritise tasks. Put your tasks on your to do list through this matrix.

- *Urgent tasks* are tasks that have to be dealt with immediately. These are things like phone calls, tasks with impending deadlines, and situations where you have to respond quickly.
- *Important tasks* are tasks that contribute to vision, mission, strategic focus areas and goals.
- Eisenhower - "What is important is seldom urgent and what is urgent is seldom important.". The problem is that important tasks often get moved down the list by urgent tasks. When you have limited time in your day, need to make sure you set aside time for important tasks.

Using the decision matrix to prioritise tasks and schedule your day

1. **Urgent, but not important -** Ask the question – 'Who else can do this task?'. If you can delegate, do so. If you can't delegate, add to your to do list and schedule time.
2. **Important, but not urgent -** Decide when you will do these tasks, schedule time.
3. **Urgent and important -** Do it immediately – this is where you start once you have completed 1 & 2.
4. **Not important, not urgent -** Do you need to do these tasks? If not, delete. If yes (they can also be pleasant tasks that you enjoy doing), schedule at a time that suits you best.

Process:

1. Write big matrix up on flip chart.
2. Write tasks on post it notes.
3. Move tasks between relevant quadrants until you've prioritised (or delegated or deleted) them all.

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Tips for making meetings more efficient

We talked about ideas to make meetings more efficient and effective. I shared some tips through managing and minimising interruptions (added here as well), and here are a couple more:

- Schedule meetings for your 'slump' time – the time of the day you feel most unproductive
- Know the purpose of the meeting ahead of time – see below for different meeting purposes. Once you know the purpose of the meeting you can decide whether you need to attend.
- Let people know what time you need the meeting to end ahead of time.
- Ask people to be specific with how much time they need – not 60 min meetings as a default, 10 min / 15 min / 20 min / 35 min / 45 min meetings are fine. Once you get into the process of using this, everyone will get more specific about how long they really need for a meeting.
- Do meetings standing up.
- Use the RASCI framework from project management. Make sure everyone is aware of their role (and your role) for a specific piece of work and make a plan for how people need to be included/communicated with based on their role:
    - R = Responsible
    - A = Accountable
    - S = Support
    - C = Consult
    - I = Inform
  - Check out this link for more info - https://www.indeed.com/career-advice/career-development/rasci#:~:text=RASCI%20stands%20for%20Responsible%2C%20Accountable,tasks%20within%20a%20single%20project.. It is a project management tool, and can be amended to help you be clear on roles and responsibilities and who needs to be involved in meetings (and who doesn't). You can also create your own version of the RASCI.

Agenda meeting – Process overview

This is a great meeting framework for keeping meetings focused. The person who adds an item to the agenda has to think about the purpose of the item, what do they want to get from including this in the meeting / having the team meeting about it? They also need to estimate how much time they need. During the meeting, for each agenda item, someone takes time. As you get near the estimated time, they ask if you want to keep focusing on this item, or can we stop talking about it? If you want to keep focusing on it, what drops of the agenda so we don't go over time.

It can feel prespcriptive, but it doesn't need to. It's a way of valuing everyone's time and making sure we think about what is on a meeting agenda. For the information give items, you may not even need to include them in the meeting, find other ways to share information.

The more you use it, the easier it gets. You would not use it for every meeting you run…it can be a great tool for getting more efficient with the meetings that could do with some help in that department.

Tips:

- The agenda is prepared as below before the meeting (agenda items asked for before the meeting)
- Minutes visibly written up at meeting on flipcharts – where applicable
- Each item is owned
- Items are dealt with one at a time, each owner in turn

- The purpose of each item is explicitly stated so that people know what is expected from them for a specific item:
  - Information give / get
  - Feedback
  - Buy-in / commitment to action
  - Generating ideas
  - Problem solving
  - Decision making
- Time:
  - Overall time is set
  - Meeting starts and finishes on time.
  - Time taken for each item is estimated and the actual time taken is recorded
  - Someone takes ownership of being time-keeper for each agenda item
  - Time is called when item reaches estimated time, group discusses whether you will continue to discuss item, and what will need to move to the next meeting/have less time on agenda to accommodate.

Example agenda

Name	Item	Purpose	Time	
			Est	Actual
Person who has called the meeting	Welcome and climate setter	▪ Relationship building	5 mins	
Chris	▪ Strategic project X ▪ Budgets ▪ Review of the last month	▪ Information give ▪ Information get ▪ Constructive Evaluation	3 mins 2 mins 5 mins	
Bob	▪ XYZ Procedure Review	▪ Decision making	5 mins	
Hilary	▪ Project update	▪ Information give ▪ Decision making	5 mins	
Linda	▪ Volunteer roles	▪ Idea generation	5 mins	
Linda	▪ Meeting booking room issue	▪ Problem solving	10 mins	
Jane	▪ Sharing a story of mission in action	▪ Information give	5 mins	
Hilary	▪ Client update ▪ Client issue	▪ Information give ▪ Idea generation	5 mins 5 mins	
Chair	▪ Consent agenda ▪ Other approvals	▪ Decision making	5 mins	
TOTAL			**60 mins**	