Work Smarter, Not Harder:

A Workbook

As someone working in philanthropy, you are making a difference—no matter your role or whether you work for a funding or nonprofit organization. You are a change-maker, helping to make the world a better place.

As you know, this work can be extremely rewarding, but it can also be overwhelming. While the needs in your community grow, time and resources are finite. So how can you create the space for the work that matters most? What can you do to prevent yourself from burning out? The answer is to work smarter, NOT harder.

Foundant partnered with collaborator and strategist Rachel Myers, who spent more than two decades working on all sides of philanthropy, to explore this topic. As a collaborator and the owner of her own consulting buisness, RM + Company, Rachel is passionate about creating systems and leveraging tools that help us all work smarter, so we can focus our attention on what matters most.

This workbook highlights:

Rachel's expert insights into how you and your team take back your time—and take on your biggest priorities. We invite you to incorporate the following tools and tips in your day-to-day work to tackle challenges including:

- Prioritization
- Planning and Facilitating Great Meetings
- Time Management
- Getting Work Done
- Leveraging Technology

I have been in the philanthropic and nonprofit world for about 24 years and have sat in nearly every seat at the table. Over that time, I've worked with so many amazing, hard-working, dedicated, smart, and talented people who want to make a big difference. When I went out on my own, after all these years of working in the sector, I brought with me this passion for helping all of us in this work to find the time, space, and energy we need to focus on the work that's most important and really moves the ball forward.

Rachel Myers

Prioritization

“Prioritization is not just about putting things in a certain order. It’s really about deciding what belongs on that task list. That means making choices, and that means saying no.”

-Rachel Myers

Key Tip: Make “no” your default answer.

Before you respond to a request, pause and consider, “Is this opportunity or request more important than the top priorities we already have on our plate?”

Let’s acknowledge that saying “no” isn’t always easy—especially for people in the philanthropic and nonprofit sectors.

Rachel explains, “A lot of us in these sectors are natural 'yes sayers' who want to make things work. That’s our mindset. And while that’s beautiful in some ways, the reality is there are only so many hours in the day, and you have to make choices.”

Do you find it difficult to make these decisions? Use the strategy screen on the next page to determine whether a potential new opportunity is right for you and your organization.

Strategy Screen

SUMMIT Foundant Technologies

A strategy screen can help you identify whether a potential new opportunity is right for your organization. Adjust the following sample criteria to align with your mission. Learn more about how to use a strategy screen in the Prioritization episode of our Work Smarter, Not Harder podcast series.

Sample Strategy Screen

- [ ] Must align with our mission and support the revitalization strategies.
- [ ] Must leverage our mission advantage.
- [ ] Must communicate our vision.
- [ ] Must engage our key stakeholders (staff, volunteers, members, and partners) to support our mission and help us meet identified critical community needs.
- [ ] Must be accessible and inclusive.
- [ ] Must support people in reaching their full potential beyond basic needs.
- [ ] Impact must be measurable, both quantitatively and qualitatively.
- [ ] Must be financially sustainable through earned or contributed revenue.
- [ ] Strategic consideration of the allocation of our resources must be determined before a new program is added.

Download strategy screen

> I subscribe to the mindset that you should do less and focus on doing it really, really well.
>
> -Rachel Myers

More Prioritization Tips:

Don't start your day with email
Instead, start your day by looking at your calendar and to-do list and setting your own priorities. Then, when the time is right, open your email.

Take a break
Give yourself time to step away and clear your mind.

Don't answer every phone call
If it isn't an emergency and you're focused on your work, let the call go to voicemail and listen later when you intentionally step away to respond to messages.

Resources

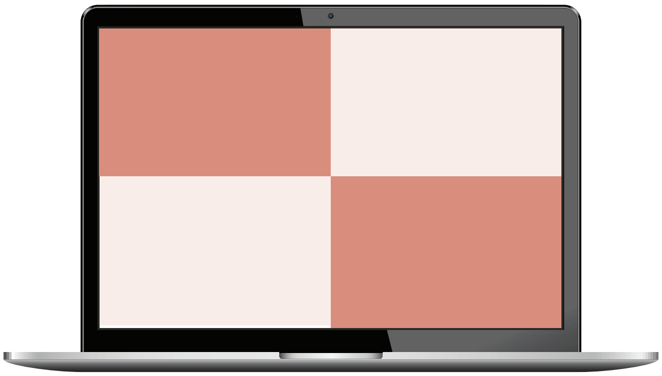
Prioritization podcast (35:45)

Prioritization explainer video (5:05)

Recommended Reading

Essentialism by Greg McKeown

Four Thousand Weeks: Time Management for Mortals by Oliver Burkeman



Planning and Facilitating Great Meetings

"I challenge you to start every meeting you call with a purpose statement."

-Rachel Myers

Meetings increased **12.9%** during the pandemic.
National Bureau of Economic Research

65% of employees agree that meetings prevent them from completing their work.
Zippia

Only **50%** of time in meetings is used effectively.
Forbes Magazine

As we consider how to make the most of our time, the subject of meetings will inevitably come up. Let's face it—we spend a LOT of time in meetings.

The first question to ask yourself is whether there is a more efficient or effective way to accomplish your goals. Perhaps you can collaborate in a shared document, send an email, or deliver an update in a quick video, as Rachel did for our team using Loom. This provided us with all the essential information without requiring a meeting.

However, meetings are often the best strategy. In those cases, you want to ensure your meetings are effective as possible.

3 Characteristics of Effective Meetings

It's important to first establish the criteria for an effective meeting. Rachel shares three characteristics:

- The meeting has a clearly defined purpose that is achieved during the meeting.
- The meeting time is valuable for all participants.
- All meeting participants contribute to the outcomes of the meeting.

So, how do you get there? Rachel provides two helpful frameworks to plan and facilitate effective meetings.

Planning Effective Meetings—The Four Ps

Use this chart and follow the Four Ps to help design effective meetings:

Meeting Title:		
Meeting Date:		
Meeting Time:		
The 4 Ps	Questions to Ask	Answers
Purpose	Why are we meeting? Could we accomplish this another way (i.e., shared document, email, update via a Loom video)?	
Product	What are we going to produce together? What are the outcomes we seek?	
People	Who needs to be present to make this happen, and what role will each participant play? What's in it for them?	
Process	How will we spend time meeting our purpose and outcomes (also known as the agenda)? Note that this is the last step, not the first.	

Key Tip: Create shorter meetings whenever possible. Rachel describes 45 minutes as the sweet spot.

Facilitating Your Meeting—The IEEI Framework

After you've planned your meeting, it's time to facilitate. Rachel recommends using the IEEI framework. Print the following checklist to use whenever you lead a meeting:

- ☐ **Inform:**
  Ensure that everyone in the meeting understands the objectives and purpose of the meeting. At the start of the session, explain why everyone is there and what the group will walk away with.

- ☐ **Empower:**
  Describe each attendee's role and their power in the meeting. Also, define your role as the facilitator.

- ☐ **Excite:**
  Share the benefits of the meeting and why it is important to each attendee.

- ☐ **Involve:**
  Engage attendees early and often. Ask questions that connect to the meeting's purpose, conduct a poll, use a whiteboard, create breakout rooms, or even get people moving if it's an in-person meeting.

More Meeting Tips

Track decisions
Use a visual tool such as a whiteboard or shared document to track key decisions, themes, or ideas to ensure all meeting attendees are in alignment. This can be done whether you are meeting in person or virtually.

Wrap up
Save time at the end of the meeting to identify and assign action items.

Send a follow-up email
Send an email to all meeting attendees within 24 hours after the meeting to summarize all decisions and action items.

Resources

Having Great Meeting podcast (31:09)

Having Great Meetings explainer video (6:41)

Time Management

"I encourage everyone to carve out a few hours every week for deep thinking and strategizing. The ROI (return on investment) for that time will most likely be exponential because it gives you the space to think, which is so valuable."

-Rachel Myers

Now that you've prioritized your tasks and considered how to make the most of your meeting time, it's time to take back your calendar!

Rachel recommends a common tactic known as "time blocking." At the end of each week, look to the week ahead and block time on your calendar for specific tasks or activities you need to complete. Strategies can include the following:

Group smaller tasks

By grouping tasks such as checking your email and responding to phone calls, you can minimize the impacts of "context switching," or jumping between unrelated tasks. While multitasking may seem more efficient, research shows that shifting between tasks can cost as much as 40% of someone's productive time!

Schedule pre- and post-meeting time blocks

Rachel recommends blocking 15 minutes before meetings to prepare so you can be fully present. Similarly, she suggests blocking 15 to 30 minutes after a meeting to address action items while they are still fresh to help avoid adding new tasks to your to-do list.

Block time to wrap up your day

Block 20 to 30 minutes at the end of your day to review any unfinished or new tasks and adjust your schedule for the rest of your week accordingly.

Create space for deep work

Schedule time each week to focus on more strategic work. Give yourself uninterrupted time to concentrate, brainstorm, and dig into your big ideas.

Resources

Time Management podcast (29:14)

Time Management explainer video (4:51)

	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 AM	Emails 8-9	Emails 8-8:30	Email 8-8:30	Email 8-8:30	Emails 8-8:30
			(Mtg prep/8:45-9)		
9:00 AM			Meeting 9-9:45		
	(Mtg prep/9:45-10)		(Wrap-up/9:45-10)		(Mtg prep/9:45-10)
10:00 AM	Meeting 10-10:45			(Mtg prep/10:15-10:30)	Meeting 10-10:45
	(Wrap-up/10:45-11)			Meeting 10:30-11:15	(Wrap-up 10:45-11)
11:00 AM				(Wrap-up/11:15-11:45)	
	Emails 11:30-12	Emails 11:30-12	Emails 11:30-12	Emails 11:30-12	Emails 11:30-12
12:00 PM	Lunch 12-1	Lunch 12-1	Lunch 12-1	Lunch 12-1	Lunch 12-1
1: 00 PM					
2:00 PM				Afternoon deep work 2-3:30	
		(Mtg Prep/2:45-3)			
3:00 PM		Meeting 3-3:45	Afternoon deep work 3-4		
		(Wrap-up/3:45-4)			
4:00 PM					Prep for next week 4-5
	Prep for tomorrow 4:30-5	Prep for tomorrow 4:30-5	Prep for tomorrow 4:30-5	Prep for tomorrow 4:30-5	

	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 AM					
9:00 AM					
10:00 AM					
11:00 AM					
12:00 PM					
1:00 PM					
2:00 PM					
3:00 PM					
4:00 PM					

Getting Work Done

“Many folks in the philanthropic and nonprofit sectors can relate to the need to be flexible and responsive. Sometimes you're on a path, and then there's a disaster in your community, or there's a new need that your organization must address, and suddenly you're pivoting away from what you thought was the path into a new path.”

-Rachel Myers

After creating the space for your mission-related work and prioritizing your key projects, you actually have to get the work done, which requires effective project management.

There are many different strategies for managing large projects, such as planning an event or launching a new program. The most suitable method depends on the scope of the project, your resources, and your organizational style.

Rachel sat down to talk with Aarron Szalancinski, an expert in a collaborative project management framework called Agile, which enables creativity, flexibility, and efficiency. Initially created for software development, Agile is now commonly used across all industries. Listen to Rachel and Aarron's podcast episode to learn more about the Agile methodology and how it might work for your organization.

When to Use Agile

- How critical is the final deliverable?
- How much change are you expecting to affect that final deliverable?

If your answers are "very" and "a lot," Agile provides a framework that enables you to adapt and respond to change as you work towards your important goal.

Elements of Agile to Implement into Your Project Management

Breaking down the work into smaller increments

Breaking your project into smaller “chunks” lets you prioritize each task and ensure all work demonstrates value toward your vision. It also prevents your team from getting sidetracked down “rabbit holes” that create inefficiencies or distract team members with work that isn’t contributing to the ultimate goal.

Frequent check-ins

How often your team meets will vary with every project. For example, Aarron meets daily with his engineering teams for quick 15-minute check-ins. All team members answered four key questions:

- What did you do yesterday?
- What are you doing today?
- Do you have any roadblocks?
- How much more time do you need?

The answers to these questions can help a project manager remove any barriers and make adjustments to enable their team’s success.

More Tips for Getting Your Work Done

Write down your goals

Use SMART goals, which are:

Specific: What do you want to accomplish? Include an answer to the "w" questions (who, what, when, why, and where).

Measurable: What metrics will you use to determine whether you have met your goal?

Achievable: Is the goal realistic? Do you have the necessary resources and skills? If not, what would it take to attain them?

Relevant: Does the goal align with or support your mission?

Time-bound: When will the goal be accomplished? Create milestones throughout the project to stay on track.

Don't try to multi-task

Again, context switching can hinder productivity, particularly when you are repeatedly distracted by smaller tasks when trying to focus on larger projects that require deeper thinking. Focus on one thing at a time, or "monotask," to make progress.

Resources

Getting Work Done podcast (30:57)

Getting Work Done explainer video (5:05)

Learn More About Agile

Trust and Transparency Through an Agile Mindset

What does it mean to be an Agile Nonprofit?

Using an Agile Framework to Win More Grants

Agile Philanthropy: An Organizational Mindset

Leveraging Technology

"Don't get in your own way when it comes to technology. Be open to experimenting with new things—not just new technologies—but new ways of using the tools you already have to make the most of those tools."

-Rachel Myers

Technology can be one of the most important tools in your work smarter, not harder toolkit, helping you streamline your workflows, reduce manual work, and create efficiencies. We know technology is designed to make our work easier. Yet, sometimes learning new systems can feel overwhelming. Rachel shares tips to help you maximize the benefits of your existing tech stack and evaluate new systems.

Leverage Your Current Tech Tools

Consider the following ideas to ensure you are taking advantage of all the functionality your current tools offer:

Designate consistent times for technology sharing

Consider setting aside 10 minutes during your regular team meetings to share tips and tricks. Or, as one of our clients does, consider scheduling a team meeting to review monthly release notes for your key software solution(s) to ensure everyone is aware of the newest features and aligned on how to integrate them into your organization’s workflows.

Schedule lunch-and-learns to share tips

Designate someone to lead each session. Bring treats to make it fun! Feed your brain and your stomach while also building stronger relationships with your teammates.

Meet with peers who use the same solution(s)

In addition to creating great resources for brainstorming and troubleshooting, you can build new and meaningful relationships in the sector.

> “There's nothing like learning from peers. When I learn something from a peer, it has so much relevance. You hear how they actually used to do something one way, implemented a new approach or idea, and now they're doing things differently and more effectively. That's so inspiring to me.
>
> -Rachel Myers

Evaluating New Technology

What if your organization identifies a need that can't be met with your existing tools? How do you navigate the seemingly endless list of options to find the right tool for your team?

Use the following table to help evaluate different solutions.

4 questions to ask when researching new technology tools:		
	Questions	Answers
Purpose	What does it do? Does it solve the problem or address the need you have identified in your organization?	
Cost	What is the cost—both financial and in terms of the time required to train and stay current?	
Security	Does the tool meet your organization's security requirements?	
Ownership	Who in your organization will be assigned to "own" that technology? And what responsibilities come with that ownership?	

Resources

Leveraging Technology podcast (22:43)

Leveraging Technology explainer video (5:05)

Additional Technology Decision-Making Tools

Decision Guide: Choosing the Right Technology Solution for Your Community Foundation

Nonprofit Software: Determining the Return on Investment (ROI) for Core Solutions

Evaluating Nonprofit Software: A Guided Workbook for Your Project

RACHEL MYERS

Rachel has more than two decades of experience working on all sides of philanthropic and nonprofit organizations, including 12 years as an executive director and nine years on the staff at her local community foundation. She also served as a board member for her local library for 11 years. Having the unique opportunity to work as an executive director, staff member, and volunteer board member has provided Rachel with unique insights into how teams can effectively collaborate to make a real difference for their community. As a consultant and collaborator, Rachel offers expertise in strategic assessment, meeting planning and facilitation, board training, communications strategy, developing planned giving programs, strengthening organizational culture, and more.

This work was created in partnership with Foundant Technologies and RM + Company.