

Jean Roberts Update

January/February 2010

www.jeanroberts.com.au



(to be read while enjoying
your favourite coffee, tea or red wine!)

The 'Art' and 'Science' of Monitoring

Contents

• Jean's activities during Summer 2009/10	Page 1
• <i>The art and science of Monitoring</i>	Page 2
• <i>Monitoring job satisfaction at governance level</i>	Page 2
• <i>Monitoring the bottom-line</i>	Page 4
• <i>Monitoring burn-out</i>	Page 4
• Jean's Library of Issue Papers – and Order Form	Page 6
• Jean's Publications – and Order Form	Page 7

Jean's activities during Summer 2009/10

Consultancy activity includes:

- Contract management,
- Establishing a new business,
- Governance role and function, and Committee/Board self-appraisal,
- Integrated planning – working from the strategic plan, through business and operational planning to the development of individual work plans,
- Preparation for accreditation,
- Project development and management
- Re-structuring as a result of unexpected and unplanned growth,
- Risk assessment and management,
- Staff performance management and appraisal,
- Submissions and tenders

Writing activity includes:

- Pre-publication arrangements with Wilkinson Publishing Pty Ltd of Melbourne, Australia, of the 3rd Edition of my 1985 book, Successful Submission Writing - for Business and Nonprofits – available for purchase on my website (RRP \$29.95) or at 'all good bookstores'
- Completion of my 10 Core Business Skills for SMEs and Nonprofits – available free of charge on my website
- Commencement of Key Definitions – available free of charge on my website
- Final chapters of my e-book – My Spiritual Journey as an Independent Consultant

Definitions:

A monitor is a person, procedure or piece of equipment that warns, checks, controls or keeps a continuous record of something

To monitor involves the act of observing or recording the activity or performance of a piece of equipment, a specific procedure, or a person or group.

The art of monitoring involves working out the most effective and efficient method or process of observing or recording the activity or performance of a piece of equipment, a specific procedure, or a person or group.

The science of monitoring is understanding and appreciating the practical implications of the (i) purpose, (ii) context and (iii) focus of monitoring. Only with such understanding comes the ability to:

- a) monitor and measure process and progress,
- b) determine effectiveness and efficiency in an objective manner,
- c) identify necessary remedial action,
- d) consider options for improvements or expansion, or
- e) allocate or re-allocate available resources.

Three examples follow:

Example 1: Monitoring job satisfaction at governance level

Committee/Board members have the potential to be a community-based organisation's greatest resource. An effective committee/board member requires and deserves a supportive environment to enable him or her to offer valuable resources such as their knowledge, experience, skills, contact networks, ideas, analytical abilities, time and energy to the work of the Committee - and hence to the organisation and its service.

Different categories of people join voluntary committees/boards, in accordance with the constitution. They may be:

- association or company members,
- business people from the local community,
- community leaders or spokespeople,
- elected or selected staff members or service-users of the organisation,
- elected representatives of local, state or federal governments,
- interested members of the wider community,
- people involved generally with the type of programs or services provided by the organisation , or
- service-users and other people involved personally with, or benefiting from, the programs and services of the organisation.

Ideally, the Committee/Board as a whole should:

1. understand the organisation and the needs, interests and aspirations of the people accessing or affected by the services,
2. reflect the characteristics and culture of the local community, and accept representation of major cultures or backgrounds within that community,

3. be willing and able to advise on social, economic and political issues and actions likely to affect the organisation and service-users,
4. be familiar with the terms and conditions of funding and service agreements,
5. understand that there are rules and regulations of Commonwealth, State and Local governments that affect the organisation and must be taken into consideration in committee/board decisions and planning,
6. be experienced and knowledgeable in a range of legal, business, financial, community development and forward planning issues,
7. have time to fulfil the duties and responsibilities of committee/board member, and
8. be able to make sound decisions, and to express and substantiate their considered opinions.

Each committee/board member needs to feel confident and comfortable in carrying out their duties and obligations, and deserves a reasonable level of job satisfaction in the role:

- **a competent committee/board member** is one who is able and willing to understand, enquire, make judgements, express opinions, question uncertainties, admit ignorance, assess information and arrive at a reasoned decision.
- **a confident committee/board member** is one with a strong sense of self-esteem, an awareness of the authority and status of the position of committee member and a clear understanding of the role, responsibilities and rights.

It is not possible to design and impose a blueprint for committee/board effectiveness and then sit back and expect it to happen. However, it is possible to define effectiveness and then provide a supportive environment within which it can flourish:

- **effectiveness** is *doing the right thing* and relates to processes, procedures and outcomes.
- **efficiency** is *doing it right* and relates to the acquisition, application and monitoring of resources.

Committee/board members need to know the right questions to ask of their CEO (or senior staff position) in order to receive the information and advice they need to effectively and efficiently carry out their governance function. A CEO similarly needs to know the right questions to ask of the committee/board to receive the information and authority they need to effectively and efficiently carry out the management function in the organisation.

Monitoring activity required

1. A Committee/Board-endorsed procedure for building a base of people interested in future Committee/Board membership,
2. A Committee/Board-endorsed induction and orientation procedure for new Committee/Board members,
3. A dedicated portfolio or sub-committee to monitor the purpose, process, progress and outcomes of the endorsed procedures, and
4. Adequate and appropriate resourcing of all monitoring activity.

Example 2: Monitoring the bottom line

In a nonprofit organisation, the 'bottom line' is *the consistent quality of services, activities and functions which address or achieve the purpose for which the organisation exists.*

In a commercial entity, it is the last line of a financial statement *that shows the net profit or loss of the company.*

In both cases, the bottom-line must be uppermost in the minds of decision-makers on a day-to-day basis.

The question to ask continuously is:

'To what extent is what I am doing - or planning to do - contributing to an improvement or enhancement in my organisation/entity's bottom-line?'

If your immediate task doesn't seem to be directly connected to the bottom line, take time to consider:

- perhaps your task is 3 or 4 steps back from the client, customer, service-user or external stakeholder,
- perhaps your task is supporting the effort or performance of a person who is closer to the client, customer, service-user or external stakeholder,
- perhaps your task is contributing to policy development, which in turn will guide others who are close or closer to the client, customer, service-user or external stakeholder.

Whatever you are doing, try to connect your task – as well as your performance – with the bottom line. If there is no connection, perhaps the task needs to be re-considered or re-worked.

Monitoring activity required

1. Ensuring that every person within the nonprofit organisation or commercial entity knows and understands the bottom-line – and how their responsibilities relate to the bottom-line: this includes orientation and induction of new people, and internal annual staff development programs,
2. Ensuring that each person with supervisory or management responsibilities knows and understands how and why this is an essential aspect of their role,
3. Inclusion in internal performance management/appraisal procedures as a critical success factor in (a) risk management, and (b) continuous quality improvement, and
4. Adequate and appropriate resourcing of all monitoring activity.

Example 3: Monitoring Burn-out

The most important point relating to 'burn-out' is that it is an organisational responsibility – not an individual responsibility. Burn-out can occur at any and all levels of activity within any organisation or entity. Of course, 'stress' is a related experience but is not necessarily a contributor to burn-out. Time and Task is our theme.

Firstly – time:

It's a common cry that time seems to be 'going faster each year'. But in actual fact, there are still 60 minutes in each hour and 24 hours in each day. We need to become more time-conscious and to see time as a friend:

- make time to reflect on your day without judging yourself or others,
- plan your time realistically – if your work involves interruptions, then accept them: but set time-limits according to the urgency and importance of each interruption,
- take time to re-vitalise yourself as you work – a two-minute stretch, read a 'thought for the day', three-minutes to tidy your work-space, a seven-minute walk up and down a nearby staircase, and perhaps tuck into that chocolate bar as you work,
- if you are caught in traffic, check your watch and measure the 'actual' time it takes to get going again: you may be surprised!
- break major tasks down into manageable units of time, and then work through these one at a time: you'll experience a greater sense of accomplishment this way, and
- make your mobile phone work for you, not against you: check your phone arrangements and availability, as it's highly likely you've made yourself a slave to this piece of technology.

Secondly – task:

'Task' is a term we don't usually use in our day-to-day work, yet it is useful to think of your work activities as 'major tasks that are composed of small units of work'. When planning your work, try scheduling the units of work rather than a major task. For example, 'writing a report' consists of separate units of work such as (not necessarily in this order):

- listing – and gathering – the information you need,
- finalising deadlines,
- finalising the final report format,
- sourcing additional information,
- identifying options for recommendation,
- exploring the implications for each option,
- assessing risk,
- undertaking a cost/benefit analysis,
- preparing the first draft,
- integrating feedback on first draft,
- finalising the final document, and
- submitting the report.

Avoiding burn-out is easier when you have a current and achievable position description, and when you know the nature and extent of authority delegated to your position. Managers, Supervisors and Team Leaders need to ensure that the people they are responsible for have this information. Similarly with Committee/Board members – they need to know what is expected of them, particularly in relation to their authority. It is wise for every Committee/Board to make sure that their CEO (or senior paid staff person) has a Statement of Delegation of Authority setting out what authority the CEO has, and what authority has been retained by the Committee/Board.

Monitoring Action required

1. Ensure that time and task analysis are key components in the organisation or entity's culture and practice, and are treated as critical success factors.
2. Ensure that every meeting has (i) the right people in attendance who have completed the necessary preparation, with (ii) the necessary information, energy and time to make considered judgements and wise decisions.

JEAN ROBERTS LIBRARY OF ISSUE PAPERS - ABN 69 461 183 015

<input type="checkbox"/> 5 Levels of Quality Maturity in Board Performance	<input type="checkbox"/> Joint initiatives between non-profit and for-profit organisations (Corporate Social Responsibility)	<input type="checkbox"/> Representative Committee or Board Membership
<input type="checkbox"/> AGM and Annual Report Checklists	<input type="checkbox"/> Linking Policies with Improved Work Practices	<input type="checkbox"/> Risk Avoidance and Risk Management
<input type="checkbox"/> Amalgamation in the Nonprofit Sector	<input type="checkbox"/> Managing Information – information, language, communication and conflict	<input type="checkbox"/> RMC Organisational Framework
<input type="checkbox"/> Auspice – what is it and how does it work?	<input type="checkbox"/> Managing Projects	<input type="checkbox"/> Role of the CEO/Senior Staff Person
<input type="checkbox"/> Board/Committee Member Recruitment & Orientation	<input type="checkbox"/> Managing Your Workplace Relationships	<input type="checkbox"/> Role of the Patron
<input type="checkbox"/> Board/Committee Minutes & Agenda Checklist	<input type="checkbox"/> Marketing of Nonprofit Organisations	<input type="checkbox"/> RMC Service Model
<input type="checkbox"/> Board/Committee Reports, with focus on information required to support effective decision-making	<input type="checkbox"/> Measurable Consumer Outcomes	<input type="checkbox"/> Stakeholder Analysis and Stakeholder Survey
<input type="checkbox"/> Building & Nurturing a Strong & Active Membership Base	<input type="checkbox"/> Member-based Associations/Clubs	<input type="checkbox"/> Strategic Alliance, Network, Consortium
<input type="checkbox"/> Compliance Requirements in a Nonprofit Organisation	<input type="checkbox"/> Organisational Structure and Structural Options	<input type="checkbox"/> Strategic and Business Planning Checklists
<input type="checkbox"/> Constitution Checklist	<input type="checkbox"/> Outsourcing	<input type="checkbox"/> Structuring for Mergers, Amalgamation, Network, etc
<input type="checkbox"/> Consultation and Decision making	<input type="checkbox"/> Performance Indicators, Measures and Targets	<input type="checkbox"/> Submission, Grant Application and Proposal Checklists
<input type="checkbox"/> Delegation of authority	<input type="checkbox"/> Planning a Community Needs Assessment	<input type="checkbox"/> Succession Planning
<input type="checkbox"/> Financial Management & Monitoring	<input type="checkbox"/> Program/Project Development, Implementation and Evaluation	<input type="checkbox"/> Traps in Tendering and Outsourcing
<input type="checkbox"/> Financial Viability – using the RMC Reality Checklist	<input type="checkbox"/> Quality Assurance and Quality Improvement	<input type="checkbox"/> What's the Difference between Governance and Management?
	<input type="checkbox"/> Recruiting and Retaining Service Club Members	<input type="checkbox"/> Why Incorporate?

ORDER FORM

Please tick the Issue Papers you wish to purchase, and forward this order form with cheque.

All Issue Papers are
\$10.00 ea, GST incl.

Name:

Position:

Org'n:

Address:

Postcode:

Cheque enclosed for

\$.....

(payable to *Roberts Management Concepts Pty Ltd*)

Mailing address below

Tax Invoice/Receipt will be
forwarded with your order

JEAN ROBERTS PUBLICATIONS ORDER FORM - ABN 69 461 183 015

<i>Publication</i>	<i>Unit Price – including GST, packaging/postage</i>	<i>Number</i>	<i>Total \$ for each item</i>
ONE MAN SHOW, the smallest of small business – for people interested or involved in self-employment (2008)	\$79.00		\$
GOVERNANCE KIT No. 1 – Clarifying the roles and responsibilities of nonprofit Committee Members/Board Directors, and self-appraisal of their performance (2006)	\$50.00		\$
GOVERNANCE KIT No. 2 – Partnership relationships – linking policies with improved work practices at governance, management and operational levels of activity (2007)	\$50.00		\$
GOVERNANCE KIT No. 3 – Personal responsibilities of nonprofit Board members (2008)	\$50.00		\$
RIDING THE WAVES OF COMMUNITY DEVELOPMENT IN AUSTRALIA – from the 1970s - including many tools to assist with forward planning (2007)	\$25.00		\$
MANAGING GOVERNANCE IN NONPROFIT ORGANISATIONS IN AUSTRALIA – book and CD-ROM– a valuable governance toolkit (2004)	\$79.00		\$
COMMITTEE MEMBERS’ HANDBOOK – a how-to and how-not-to for voluntary committees of management	\$30.00		\$
COMPETITIVE TENDERING – how to write a competitive tender	\$35.00		\$
SUCCESSFUL SUBMISSION WRITING – for business and nonprofits 3rd Edition (2009)	\$29.95 NEW Edition		\$
THE LEFT AND RIGHT BRAIN BUSINESS – linking organisational effectiveness with individual job satisfaction	\$35.00		\$
Total amount due			\$

Name:

Position:

Organisation:

Address:

Phone:..... Fax:.....Email:

Cheque enclosed for \$..... (Payable to *Roberts Management Concepts P/L*)

**Fax, email or mail to Roberts Management Concepts Pty Ltd as below
A Tax Invoice/Receipt will be forwarded with your order**