



BEST OF THE BUCKETS!

FROM THE 2-DAY WORKSHOP EXPERIENCE

**Head Start Workshop
CCCA National Conference
December 6, 2010
Ridgecrest Conference Center ▲ Asheville, N.C.**

MASTERING THE MANAGEMENT BUCKETS:

Creating Goal Alignment

Between Your Staff, Volunteers and Board Members

Leading a ministry is complex and often chaotic—and it really does take a "village" to master the 20 core competencies and best practices to get your entire team (or department) focused on Kingdom goals so they are results-driven versus activity-driven. This fast-paced and highly practical "Best of the Buckets" day will focus on six management breakthroughs. You'll leave with 29 specific take-aways from these six buckets:

- Results Bucket
- Strategy Bucket
- Team Bucket
- Hoopla!* Bucket
- Volunteer Bucket
- Board Bucket

John Pearson

JOHN PEARSON ASSOCIATES, INC.

MANAGEMENT AND BOARD GOVERNANCE CONSULTANTS

P.O. Box 74985 - San Clemente, CA 92673 USA

Mobile Phone 949/500-0334, Fax 949/498-6109

John@JohnPearsonAssociates.com

www.JohnPearsonAssociates.com

Book:

Mastering the Management Buckets:

20 Critical Competencies for Leading Your Business or Nonprofit

www.ManagementBuckets.com

Complimentary eNewsletter:

Your Weekly Staff Meeting

"a book review and a bucket every week" – sign up at www.ManagementBuckets.com
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Visit: www.managementbuckets.com/pages/The_Buckets

Click on all 20 buckets to:

- Download Staff Meeting Worksheets
 - Review Bucket Resources
- Order recommended books for each bucket

To download today's PowerPoint:

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To download PowerPoints from the 2009 CCCA National Conference

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29 Take-aways:

1	16
2	17
3	18
4	19
5	20
6	21
7	22
8	23
9	24
10	25
11	26
12	27
13	28
14	29
15	Top Take-away:



<p>The 3-legged stool: Cause Community Corporation</p>	
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OUR CAUSE

✓THE RESULTS BUCKET	1
THE CUSTOMER BUCKET	2
✓THE STRATEGY BUCKET	3
THE DRUCKER BUCKET	4
THE BOOK BUCKET	5
THE PROGRAM BUCKET	6

OUR COMMUNITY

THE PEOPLE BUCKET	7
THE CULTURE BUCKET	8
✓THE TEAM BUCKET	9
✓THE <i>HOOPLA!</i> BUCKET	10
THE DONOR BUCKET	11
✓THE VOLUNTEER BUCKET	12
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OUR CORPORATION

✓THE BOARD BUCKET	14
THE BUDGET BUCKET	15
THE DELEGATION BUCKET	16
THE OPERATIONS BUCKET	17
THE SYSTEMS BUCKET	18
THE PRINTING BUCKET	19
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1. THE RESULTS BUCKET

CORE COMPETENCY

We focus on results. We are not activity-driven, we are results-driven. We measure what we value, so we celebrate both the writing and the achieving of team-blessed standards of performance for every staff member, board member and volunteer. We also abandon dead horses and sacred cows.

Strategic Balls in the Results Bucket

- ❶ MANAGE for results.
- ❷ FOCUS on outside results, not inside results.
- ❸ PRIORITIZE results with S.M.A.R.T. standards of performance.
- ❹ MEASURE your results.
- ❺ SLOUGH OFF yesterday.

Where is your ORGANIZATION today? What's your 1-year goal?

	4 LEVEL OF MANAGEMENT KNOWLEDGE AND COMPETENCIES	TODAY	IN 1 YEAR:
Level 1	I don't know what I don't know.		
Level 2	I know what I don't know.		
Level 3	I have an action plan to address what I know I don't know.		
Level 4	I am knowledgeable and effective in this core competency and can mentor others.		

Where are YOU today? What's your 1-year goal?

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Level 4	I am knowledgeable and effective in this core competency and can mentor others.		



1 Manage for Results

Allocate resources to results—not problems.

PETER DRUCKER challenged nonprofit organizations and churches to focus on the “Five Most Important Questions Every Nonprofit Organization Must Ask.” They are:

- 1) What is our mission?
- 2) Who is our customer?
- 3) What does the customer value?
- 4) What are our results?**
- 5) What is our plan?

RESOURCES:

- The Drucker Foundation Self-Assessment Tool* (Participant Workbook)
- The Drucker Foundation Self-Assessment Tool* (Process Guide)
- LeaderToLeader.org (formerly: Drucker Foundation website)
- Managing for Results* (Peter Drucker)

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Are your board reports, water cooler conversations, donor letters, and your elevator speech about “activities and anecdotes” or RESULTS?



2 Focus on Outside Results Versus Inside Results

5 subtle signs about your priorities

LISTEN TO PETER DRUCKER (*Managing for Results*, by Peter Drucker)

- “Neither results nor resources exist inside the business. Both exist outside the business.”
- “Results are obtained by exploiting opportunities, not by solving problems.”
- “Resources, to produce results, must be allocated to opportunities, rather than to problems.”

Your Priorities	Inside Results	Outside Results
1) Staff Meetings		
2) Newsletters and Donor Letters		
3) Elevator Speech (“How’s it going?”)		
4) Budget		
5) Celebrations		

Notes:

RESOURCES:

Managing for Results (Peter Drucker)

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Create an “Outside Results” culture with strategic tools and formal and informal celebrations. (See ideas in The *Hoopla!* Bucket.)



3 Prioritize Results With *S.M.A.R.T.*

Standards of Performance!

Create clear goals and a rigorous accountability system with celebration mileposts.

S.M.A.R.T. SOPs:

- **Specific.** The performance standard should clearly specify what results you want to achieve.
- **Measurable.** It must describe, in quantifiable terms, the exact finish line (i.e., 300 widgets, 500 new donors, 25 trained volunteers).
- **Achievable.** The performance standard must be attainable. No pie in the sky stuff here!
- **Realistic.** It must also be rooted in reality and aligned with the resources you have allocated to the goal. Does the whole team agree that it's realistic?
- **Time-related.** The SOP must have a specific date when the results will be achieved (i.e., December 31).

Next Steps & Implementation Ideas:

Every leader, every manager, every direct report—virtually every team member—must write 5 to 10 annual standards of performance. The SOPs must:

- (1) Meet the S.M.A.R.T. criteria,
- (2) Be reviewed and approved by peers, direct reports and each person's boss or board, and
- (3) Be part of a regular accountability/reporting process (usually monthly).

Many teams start with a two-day annual retreat and focus first on the mission, the Big Holy Audacious Goal, the G.N.O.M.E. Chart (more on these in the Strategy Bucket) and then—based on the coming budget year—discuss each team member's vital role in helping to accomplish the corporate goals for the year. Each person then submits 5 to 10 personal draft SOPs for group discussion.

Other teams use a consultant or a facilitator to keep the retreat process on track and to breathe new life into what could become a routine or stale annual exercise.

As SOPs are aligned with the emerging annual budget, your SOPs may go through several drafts. Ultimately, when every team member's SOPs are approved for the next fiscal year, it will be time to celebrate!



S.M.A.R.T. Goals (Practice):

1) By this date _____, 2011, I will _____

_____.

2) By this date _____, 2011, I will _____

_____.

3) By this date _____, 2011, I will _____

_____.

Next Steps:

Create a Word document that includes:

ABC MINISTRY'S ANNUAL GOALS FOR FY2011 (JAN. 1 – DEC. 31, 2011)

Version 2.0 (Updated by Hank on 12/15/2010)

- 1) Corporate Goals (5 to 10)
- 2) CEO Goals (5 to 10)
- 3) Direct Reports to CEO (5 to 10 goals for each person)
- 4) Reporting plan and frequency
- 5) Accountability plan
- 6) Celebration plan (*Hoopla!*)



SAMPLE TEMPLATE

3J GLOBAL MINISTRIES

Annual CEO Standards of Performance (SOPs) for John W. Doe

Monthly Update to be submitted to Board of Directors by the 15th of each month.

FY2011 - 12 Months January 1 – December 31, 2011 <i>Draft #2 – Updated on Dec. 6, 2010</i>	Target Date
1. Revenue and Expenses. Achieve the year-end net income goal of \$40,000, based on revenue of \$500,000 and expense of \$460,000.	12/31/11
2. Operating Reserves. Increase operating reserves from \$114,000 to \$154,000 (equivalent to 4 months of the FY2010 expense budget).	12/31/11
3. Board Member Recruitment. Assist the board by cultivating up to five new board prospects for terms beginning on Jan. 1, 2012	9/30/11
4. Three-Year Rolling Strategic Plan: 2012-2014. Based on board feedback, recommend the final version of the 2012-2014 Strategic Plan to the board.	9/30/11
5. Data Base Conversion. Move all data from the ABC software program to the XYZ program.	3/31/11
6. Vision 2020 Resource Center. Implement the Phase 1 Pilot Program of the Vision 2020 Virtual Resource Center, including the cultivation, recruitment, orientation and engagement of 2 state coordinators, 10 area coordinators and 50 local church ambassadors.	12/31/11
7.	
8.	
9.	
10.	

Note: These 2011 SOPs were approved by the Board of Directors on November 15, 2010.

S.M.A.R.T. Standards of Performance are:
Specific, Measurable, Achievable, Realistic, Time-related



4 Measure Your Results

Track your progress with leading indicators.

ONE PAGE LEADING INDICATORS will revolutionize your work!

- Other names: Metrics, Dashboard, Goals, etc.
- See Standards of Performance in this bucket.
- See details in The Strategy Budget.
- Report monthly with just one-page.

Top 10 Leading Indicators: Monthly Update

Approved by Management Team on October 15

Leading Indicators	Point Person	ANNUAL GOAL (12 Months)	YTD Goal (6 Months)	YTD Actual (6 Months)	YTD Difference
1) Revenue	Bob	\$925,000	\$500,000	\$517,000	+\$17,000
2) New volunteers	Dale	250	175	195	+20
3) New donors (\$500 or more)	Sue	175	75	125	+50
4) Partnerships	Fred	5	1	2	+1
5) Regional reps trained and certified	Rob	25	12	10	-2
6) Website product downloads	Rob	10,000	3,500	5,500	+2,000
7)					
8)					
9)					
10)					

Notes: Melinda will compile and distribute this report by the fifth of each month and the Management Team will review it at our meeting on the second Wednesday of every month.



RESOURCES:

- The Results Bucket: download chapter one from *Mastering the Management Buckets* at www.ManagementBuckets.com
- Visit “The Results Bucket” page at: www.managementbuckets.com/pages/The_Buckets
- The Five Most Important Questions Your Will Ever Ask About Your Organization*, by Peter Drucker (Jossey-Bass and www.LeaderToLeader.org)
- The Nonprofit Dashboard: A Tool for Tracking Progress*, by Lawrence M. Butler, BoardSource (BoardSource.org) - [\$52 non-members, \$39 members]
- The Three Signs of a Miserable Job*, by Patrick Lencioni
- Leaving Microsoft to Change the World: An Entrepreneur’s Odyssey to Educate the World’s Children*, by John Wood
- Execution: The Discipline of Getting Things Done*, by Larry Bossidy and Ram Charan

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Faith-based SOPs. Proverb 16:9: “In his heart a man plans his course, but the Lord determines his steps.”



4 (continued)

Define Quantitative and Qualitative Results

Use creativity in monitoring progress and achievements.

ASK YOURSELF THESE KEY QUESTIONS. Peter Drucker suggests the following questions:

- How do we define results?
 - Quantitative
 - Qualitative
 - Perception
- Are we successful?
- How does our organization currently define results?
- How does our organization monitor progress and achievement?
- What results are currently being achieved?

Jim Collins says “all indicators are flawed.”

“It doesn’t really matter whether you can quantify your results. What matters is that you rigorously assemble evidence—quantitative or qualitative—to track your progress.”

Discuss:

- [] Greatness at the Cleveland Orchestra
- [] Billy Graham Crusade (3 levels of results)

RESOURCES:

- Good to Great and the Social Sectors: Why Business Thinking Is Not the Answer*, by Jim Collins
- JimCollins.com
- Article: “Ensuring Mission Impact: How to Move From Strategy to Results,” by Matt Breitenberg and Art Caccese, *Christian Management Report* (Dec. 2003), [posted on “The Results Bucket” page at www.ManagementBuckets.com]

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Jim Collins: *“What matters is not finding the perfect indicator, but settling upon a consistent and intelligent method of assessing your output results and then tracking your trajectory with rigor. What do you mean by great performance? Have you established a baseline? Are you improving? If not, why not? How can you improve even faster toward your audacious goals?”*



5 Slough Off Yesterday

When the horse is dead, dismount!

MORE DRUCKER INSIGHTS. Finally, look at Peter Drucker’s critical questions—focused on results:

What must we strengthen?

What must we abandon?

Confidential Mental Exercise: Trim 20 percent of your budget and your team.

RESOURCES:

Read John 15:1-2 (NIV): *“I am the true vine, and my Father is the gardener. He cuts off every branch in me that bears no fruit, while every branch that does bear fruit he prunes so that it will be even more fruitful.”*

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Effective leaders and managers identify sacred cows and dead horses and deal with them thoughtfully and appropriately. (See the section on “social styles” in The People Bucket for clues on breaking bad news.)



Worksheet #1.2

When the Horse Is Dead, Dismount!

Read Chapter 1: The Results Bucket (pages 35-37)

How many dead horses are you still riding, attempting to resuscitate not just a losing program or product, but a dead loser?

Check the Top-5 Answers You Often Hear in Your Organization!

In the fascinating can't-put-it-down book, *Into the Future: Turning Today's Church Trends Into Tomorrow's Opportunities*, by Elmer Towns and Warren Bird, the respected authors write that "Dakota tribal wisdom says that when you discover you are riding a dead horse, the best strategy is to dismount. In contrast, here's how many in the church respond when they find out their 'horse' is dead."

1. Say things like, "This is the way we always have ridden this horse."
2. Appoint a committee to study the horse.
3. Buy a stronger whip.
4. Change riders.
5. Arrange to visit other churches to see how they ride dead horses.
6. Raise the standards for riding dead horses.
7. Appoint a tiger team to revive the dead horse.
8. Create a training session to increase our riding ability.
9. Compare the state of dead horses in today's environment.
10. Change your definition or rules by declaring, "This horse is not dead."
11. Hire new staff members to ride the dead horse.
12. Harness several dead horses together for increased speed.
13. Declare that "no horse is too dead to beat."
14. Provide additional funding to increase the horse's performance.
15. Do a cost-analysis study to see if riding dead horses is cheaper.
16. Purchase a product to make dead horses run faster.
17. Declare that the horse is "better, faster, and cheaper" dead.
18. Form a quality circle to find uses for dead horses.
19. Revisit the performance requirements for horses.
20. Say this horse was procured with cost as an independent variable.
21. Promote the dead horse to a supervisory position.



3. THE STRATEGY BUCKET

CORE COMPETENCY

We plan, believing the results are up to God. We energize our people and customers with a Big Holy Audacious Goal (BHAG). We're systematic—never negligent—in our strategic planning. We know our mission statement by memory, and our programs, products and services are in alignment with the mission.

Strategic Balls in the Strategy Bucket

- ❶ BUILD a team-crafted strategic vision statement.
- ❷ MEMORIZE your mission statement.
- ❸ BE STRATEGIC about strategic planning.
- ❹ SUMMARIZE your plan with a G.N.O.M.E. chart.

Where is your ORGANIZATION today? What's your 1-year goal?

	4 LEVEL OF MANAGEMENT KNOWLEDGE AND COMPETENCIES	TODAY	IN 1 YEAR:
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The 7 Reasons Why Strategic Plans Fail

A = Not our problem.

B = Might be a problem.

C = Is a problem.

D = Yikes! This needs our attention!

E = We need a plan to address this.

_____ **#1. Event Thinking**

Strategic planning is viewed as an event or a task, instead of a transformational ongoing process.

_____ **#2. Top-Down Ego**

Strategic planning is created top-down and characterized by ego and arrogance, instead of humility and listening.

_____ **#3. Interruption**

Strategic planning is seen as an “add-on” interruption to my “real work,” instead of becoming absolutely core to my role.

_____ **#4. Extra Expense**

Strategic planning is allocated as an extra expense (that is often cut) instead of a critical core investment.

_____ **#5. Binder Syndrome**

Strategic planning conjures up complex and time-consuming exercises and 3-ring binders, instead of being the servant to a simple and elegant plan that is grounded in the alignment between the mission, BHAG, and S.M.A.R.T. goals.

_____ **#6. Sacred Cows**

Strategic planning “economizes” by involving fewer and “safer” stakeholders who honor tradition, dead horses and sacred cows, versus out-of-the-box dangerous ideas!

_____ **#7. Pseudo Prayer**

Strategic planning, for the Christ-follower, gives a wink and a prayer to holy input, versus an extraordinary process of assembling spiritually discerning people together to hear from God—who then joyfully follow His plan.

BONUS REASON!

_____ **#8. Verbal Fuzz**

Strategic planning festers in a “verbal draft” purgatory, versus becoming a disciplined process that is both written and implemented.

▲ “I LEARNED TO WRITE
TO BURN THE FUZZ OFF MY THINKING.” ▲
FRED SMITH, *BREAKFAST WITH FRED*



1 Build a Team-Crafted BHAG!

Ignite the Awesome Power of a Big Holy Audacious Goal!

JIM COLLINS popularized the BHAG (Big Hairy Audacious Goal) in his book, *Built to Last*. But John Naisbitt hammered the concept home in his 1982 book, *Megatrends*. He wrote “Strategic planning is worthless—unless there is first a strategic vision.”

According to NASA, “History changed on October 4, 1957, when the Soviet Union successfully launched Sputnik I. The world's first artificial satellite was about the size of a basketball, weighed only 183 pounds, and took about 98 minutes to orbit the Earth on its elliptical path.”

On May 25, 1961, President John F. Kennedy announced what Naisbitt calls a strategic vision:

“Put a man on the moon by 1970!”

“This strategic vision gave **magnetic direction** to the entire organization. Nobody had to be told or reminded of where the organization was going,” wrote Naisbitt.

Contrast that strategic vision with this wimpy mission statement:

“We are going to be the world leader in space exploration.”

(This doesn't organize anything!)

RESOURCES:

▲ BOOKS

☑ = Highly Recommended by John Pearson

☑ 101 Mission Statements From Top Companies: Plus Guidelines for Writing Your Own Mission Statement	Abrahams, Jeffrey
Applebee's America: How Successful Political, Business and Religious Leaders Connect With the New American Community	Sosnik, Douglas B., Dowd, Matthew J., and Fournier, Ron
Beyond Bullet Points: Using Microsoft Office PowerPoint 2007 to Create Presentations That Inform, Motivate and Inspire	Atkinson, Cliff
Confronting Reality: Doing What Matters to Get Things Right	Bossidy, Larry and Charan, Ram
☑ Driving Strategic Planning: A Nonprofit Executive's Guide (2nd Edition)	Waechter, Susan A.
Duct Tape Marketing: The World's Most Practical Small Business Marketing Guide	Jantsch, John
Execution: The Discipline of Getting Things Done	Bossidy, Larry and Charan, Ram
Good to Great: Why Some Companies Make the Leap and Others Don't	Collins, Jim
☑ Good to Great and the Social Sector	Collins, Jim
Good to Great Diagnostic Tool	www.JimCollins.com
☑ The Best of Success: A Treasury of Inspiration (Note: This is a book of quotations, organized by subject. It's perfect for sprinkling quotes on various pages of the strategic plan.)	Kelly, Bob and Anderson, Mac
How the Mighty Fall ... and Why Some Companies Never Give In	Collins, Jim
Major Donor Game Plan: Rounding 3rd and Heading Home	McLaughlin, Patrick
☑ Managing Transitions: Making the Most of Change	Bridges, William
☑ Mastering the Management Buckets: 20 Critical Competencies for Leading Your Business or Nonprofit	Pearson, John



Creating Goal Alignment by Leveraging the 20 Management Buckets

<input checked="" type="checkbox"/> Reveal: Where Are You? Note: Great insight on the customer from Willow Creek Community Church—and a couple of pages on Starbucks that is (ahem) very revealing.	Hawkins, Greg and Parkinson, Cally
Six Disciplines® Execution Revolution: Solving the One Business Problem That Makes Solving All Other Problems Easier	Harpst, Gary
<input checked="" type="checkbox"/> Strengthening the Soul of Your Leadership: Seeking God in the Crucible of Ministry	Barton, Ruth Haley
The 80/20 Principle: The Secret to Achieving More With Less	Koch, Richard
<input checked="" type="checkbox"/> The E-Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It	Gerber, Michael E.
<input checked="" type="checkbox"/> The Five Most Important Questions You Will Ever Ask About Your Organization (Peter Drucker, with commentary by Jim Collins and others)	Drucker, Peter & Others
<input checked="" type="checkbox"/> The Nonprofit Dashboard: A Tool for Tracking Progress (Lawrence M. Butler)	Butler, Lawrence M.
Wired to Care: How Companies Prosper When They Create Widespread Empathy	Patnaik, Dev with Mortensen, Peter
You've Got to Be Believed to Be Heard: The Complete Book of Speaking in Business and in Life	Decker, Bert
Zing! Five Steps and 101 Tips for Creativity on Command	Harrison, Sam

▲ INSPIRATIONAL DVDs

- In the Shadow of the Moon (DVD)

▲ WEBSITES

- BoardSource.org
- LeaderToLeader.org
- ManagementBuckets.com (click on “The Buckets”)
- World Future Society – wfs.org

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Every single person on your team (staff, volunteers, donors, envelope-stuffers, past board chairs—plus all of their spouses and/or families) will be energized by your focused BHAG. Or...they will have that deer-in-the-headlights look if your strategic vision is the least bit fuzzy.



2 Memorize Your Mission Statement

If your team members cannot recite your mission statement from memory, take it off the wall and rewrite it.

THREE CRITICAL STATEMENTS FOR YOUR BEST WORDSMITHS

Your Mission Statement

Your Slogan (Brand Promise)

Your Values (3 to 5)

RESOURCES:

- 101 Mission Statements from Top Companies: Plus Guidelines for Writing Your Own Mission Statement* (Jeffrey Abrahams)
- The Drucker Foundation Self-Assessment Tool* (Participant Workbook)
- The Drucker Foundation Self-Assessment Tool* (Process Guide)
- LeaderToLeader.org (formerly: Drucker Foundation website)

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Your mission statement should fit on a t-shirt. Your slogan (brand promise) should appear everywhere (newsletters, stationery, reception center, etc.), but your VALUES should be lived out day after day after day after day.



A Superb Mission Statement:

- Is short and sharply focused.
- Is clear and easily understood.
- Defines why we do what we do, and why the organization exists.
- Does not prescribe means.
- Is sufficiently broad.
- Provides direction for doing the right things.
- Addresses our **opportunities**.
- Matches our **competence**.
- Inspires our **commitment**.
- Says what, in the end, we want to be remembered for.

And...it fits on a T-shirt!

Drucker asks:

- What is the current mission?
- What are our challenges?
- What are our opportunities?
- Does the mission need to be revisited?
 - Yes
 - No

Source: The Drucker Foundation Self-Assessment Tool (Participant Workbook)



3 Be Strategic About Strategic Planning

“Insanity is doing the same thing over and over again and expecting different results.”

6 KEY STEPS

- 1) Retain a consultant.
- 2) Create a rolling three-year plan.
- 3) Begin with the basics.
- 4) Assign a point person.
- 5) Work through the five “Drucker Questions.”
- 6) Pray for a breakthrough.

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

“There is in the act of preparing, the moment you start caring.” (Winston Churchill)



4 Summarize Your Plan With a G.N.O.M.E. Chart

This would have helped Christopher Columbus!

THE GNOME PLAN

GOALS	NEEDS	OBJECTIVES	METHODS	EVALUATION
1.				
2.				
3.				
4.				

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

The reason your team doesn't have time to create a strategic plan is because you don't have a strategic plan!



4 (continued)

Wordsmith Your Strategic Plan Poster (SPP)

Post your 11" x 17" poster on every wall and in every cubicle!

THE 5 KEY ELEMENTS OF YOUR SPP:

- 1) The **P**rocess
- 2) The **P**eople
- 3) The **P**oster
- 4) The **P**roclamation!
- 5) The **P**rogress (accountability and annual update)

The Poster - 11" x 17"

- Mission
- Strategic Vision (BHAG)
- Values
- Goal #1 (5 years, 3 years, 1 year)
- Goal #2 (5 years, 3 years, 1 year)
- Goal #3 (5 years, 3 years, 1 year)
- Goal #4 (5 years, 3 years, 1 year)

See samples on following pages.

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

The Strategic Plan Poster will revolutionize the routine of your paid and unpaid team members when you inspire them to connect the BHAG with their day-to-day faithfulness.



(11" x 17" four-color placemat for every team member)

XYZ Organization's Strategic Plan – 2009 to 2011

BHAG HERE...

G.N.O.M.E.	OUR BRAND	OUR TARGET	OUR CALLING	OUR BHAG!
GOALS	<u>Goal #1</u> ESTABLISH ...	<u>Goal #2</u> FOCUS ON ...	<u>Goal #3</u> EQUIP ...	<u>Goal #4</u> GROW TO ...
NEEDS (Member Research)				
OBJECTIVES (Key Results)				
METHODOLOGY (Strategy & Tactics)				
EVALUATION (Results Verification)				

OUR MISSION	OUR MISSION IS TO...
--------------------	----------------------

OUR STRATEGIC VISION (B.H.A.G.)	TO GROW TO...
---	---------------

OUR CORE VALUES	#1 #2 #3
------------------------	----------------



6. THE PROGRAM BUCKET

CORE COMPETENCY

We are zealots for program effectiveness and so we research and understand our customer before launching new programs, products or services. We measure program results. We feed our primary programs and drop the losers—all in the spirit of discerning where God is at work.

Strategic Balls in the Program Bucket

- ❶ GIVE program choices.
- ❷ BUILD program capacity and sustainability first.
- ❸ FEED your strongest programs and benchmark the others.
- ❹ DON'T BE the eighth lemonade stand in a row of nine!

Where is your ORGANIZATION today? What's your 1-year goal?

	4 LEVEL OF MANAGEMENT KNOWLEDGE AND COMPETENCIES	TODAY	IN 1 YEAR:
Level 1	I don't know what I don't know.		
Level 2	I know what I don't know.		
Level 3	I have an action plan to address what I know I don't know.		
Level 4	I am knowledgeable and effective in this core competency and can mentor others.		

Where are YOU today? What's your 1-year goal?

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2 Build Program Capacity and Sustainability First

You never have a second chance to make a first impression.

Top 10 Questions to Ask About Program Capacity and Sustainability

Check the three most important for your organization.

- 1. Does this program align with our mission statement?
- 2. Does this program align with our Big Holy Audacious Goal (BHAG)?
- 3. Does this program have written goals that meet the S.M.A.R.T. test (Specific, Measurable, Achievable, Realistic, Time-related)?
- 4. Do we have the people capacity to both launch the program and maintain it (a staff champion, support staff, volunteers, and so forth)?
- 5. Have we answered the five Drucker questions?
- 6. Have we invested adequate time and money in researching *Who is the customer?* and *What does the customer value?*
- 7. Does this program align with our culture and our core values?
- 8. Have we conducted due diligence to assess the program's sustainability (including revenue and expense) over the next three to five years?
- 9. Under what conditions do we agree that we will "pull the plug" on this program if the goals are not achieved by the target dates?
- 10. Have we been diligent in asking our inside circle for constructive criticism or have we spiritually hyped it so much that naysayers have been silenced?

Bucket Bottom Line:

Is there anyone here who, planning to build a new house, doesn't first sit down and figure the cost so you'll know if you can complete it? If you only get the foundation laid and then run out of money, you're going to look pretty foolish. Everyone passing by will poke fun at you: "He started something he couldn't finish" (Luke 14:28-30).



3 Feed Your Strongest Programs and Benchmark the Others - *All programs are not created equal.*

STRATEGIC PROGRAM DEVELOPMENT STANDARD
Annual Evaluation of Current & Future Programs
Primary Programs & Secondary Programs

Program Criteria 5 = Currently meets or exceeds criteria 4 = Has met or exceeded criteria at least 2 out of the last 3 years. 3 = Has not met the criteria—but we agree it will likely meet it in the next year. 2 = No reason to believe it will meet the criteria. 1 = Based on this criteria, time to drop it.	Program A	Program B	Program C	Program D	Program E
1) Program serves a minimum of ___% of our customers (members, donors, etc.)					
2) Program generates a net income of ___%.					
3) The measurable results of this program are improving each year.					
4) Customer research and feedback indicate this program has strong appeal and/or potential.					
5) Let's be honest. This is a "sacred cow" and we'll give it one more year.					
6)					
7)					
TOTAL SCORES:					

Determine score ranges for primary programs and secondary programs.
 (Example: Primary programs must score at least 37 out of 50 points.)

RESOURCES:

Article: Measuring Effectiveness 101 (Dan Baum)
<http://www.boardsource.org/Knowledge.asp?ID=1.1076>

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Can you attribute your outcomes to your program? When you evaluate programs, are you measuring "process" or "outcomes?"



7. THE PEOPLE BUCKET

CORE COMPETENCY

We celebrate the God-designed uniqueness of our team members, our customers, our donors, and our volunteers. We are diligent about understanding the four social styles—Analyticals, Drivers, Amiables and Expressives—and helping our people find their comfort zones as they grow in their interpersonal versatility skills.

Strategic Balls in the People Bucket

- ❶ KNOW your own social style.
- ❷ COMMUNICATE creatively with the four social styles.

Where is your ORGANIZATION today? What's your 1-year goal?

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1 Know Your Own Social Style

Find your comfort zone and help others feel comfortable.

3 Key Concepts:

- Assertiveness
- Responsiveness
- Versatility

CONTROL

ASK

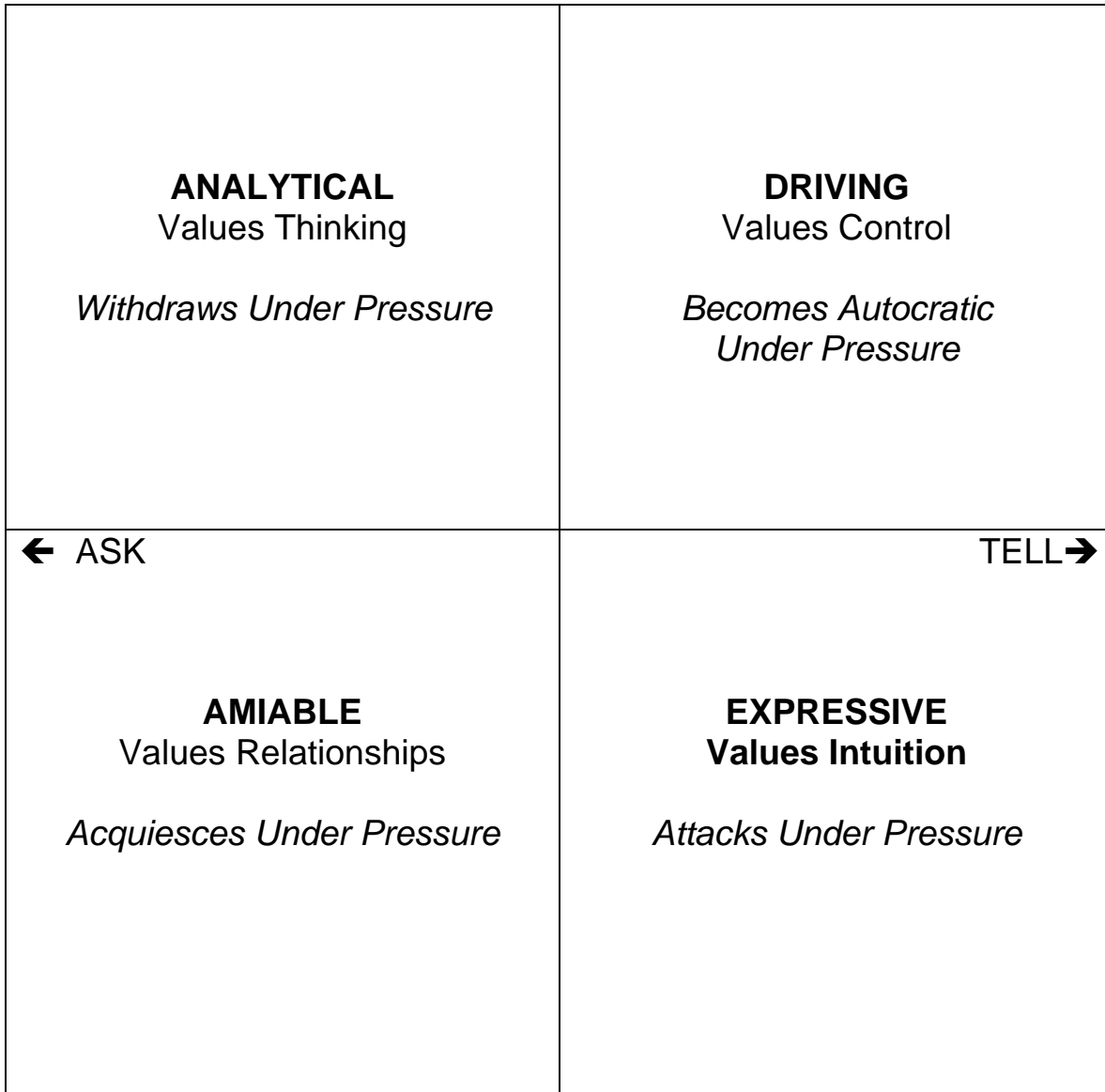
TELL

EMOTE



THE FOUR SOCIAL STYLES

CONTROL
Tasks/Facts



↓
EMOTE
Feelings/Intuition



Interpersonal Versatility

Low Versatility	High Versatility
Concerned for self	Concerned for others
Reduces tension for self	Reduces tension for others
Narrow interests	Broad interests
Rigidity	Flexibility
Unwilling to adapt	Adapts
Resistant to feedback	Open to feedback

This chart is for all Analyticals (16 options):

Analytical Analytical	Driver Analytical	<i>Analytical Driver</i>	<i>Driver Driver</i>
Amiable Analytical	Expressive Analytical	<i>Amiable Driver</i>	<i>Expressive Driver</i>
ANALYTICAL AMIABLE	DRIVER AMIABLE	<i>Analytical Expressive</i>	<i>Driver Expressive</i>
AMIABLE AMIABLE	EXPRESSIVE AMIABLE	<i>Amiable Expressive</i>	<i>Expressive Expressive</i>



Do's and Don'ts for the Four Styles

Driving	Expressive	Analytical	Amiable
DO	DO	DO	DO
Speak in terms of concrete results Focus on the present, the short term Stick to the point Do your homework Stress how the Driver will “win” with your proposition	Seek ideas, input Focus on the future Illustrate concepts with stories Focus on the big picture Stimulate their creative impulse Stress how the Expressive will stand out from the others	Be logical and well organized Focus on past, present and future Give facts, evidence, and lots of data Focus on detail Allow time to ponder Stress how the Analytical can be assured of being right	Be personal and personable Focus on tradition Emphasize a team approach Be flexible Allow time to “feel good” Stress how the Amiable can be “safe”
DON'T	DON'T	DON'T	DON'T
Be ambiguous Focus on the long-term Back down if you're convinced you're right Give too much detail Get into a control contest	Put down the Expressive's enthusiasm and excitement Be cool and impersonal Be impatient with side trips and creativity Be too serious Give too much detail Nit-pick	Rush things Be intolerant of details Overlook the past Be too personal Be too emotional Press for immediate action Appear to not be serious	Press hard to change things Push for too much detail Push for immediate commitment Be cool and impersonal Attack Be dictatorial or autocratic



2 Communicate Creatively With the Four Social Styles

Just one communication style will fail miserably!

General Overview of the Four Social Styles

	ANALYTICALS	DRIVERS	AMIABLES	EXPRESSIVES
Reaction	Slow	Swift	Unhurried	Rapid
Orientation	Thinking and fact	Action and goal	Relationship and peace	Involvement and intuition
Likes	Organization	To be in charge	Close relationships	Much interaction
Dislikes	Involvement	Inaction	Conflict	To be alone
Maximum effort	To organize	To control	To relate	To involve
Minimum concern	For relationships	For caution in relationships	For affecting change	For routine
Behavior directed toward achievement	PRIMARY EFFORT: Works carefully and alone	PRIMARY EFFORT: Works quickly and alone	Secondary Effort: Works slowly and with others	Secondary Effort: Works quickly and with team
Behavior directed toward acceptance	Secondary Effort: Impress others with precision and knowledge	Secondary Effort: Impress others with individual effort	PRIMARY EFFORT: Gets along as integral member of group	PRIMARY EFFORT: Gets along as exciting member of group
Actions	Cautious	Decisive	Slow	Impulsive
Skills	Good problem-solving skills	Good administrative skills	Good counseling skills	Good persuasive skills
Decision-making	Avoids risks, based on facts	Takes risks, based on intuition	Avoids risks, based on opinion	Takes risks, based on hunches
Time frame	Historical	Present	Present	Future
Use of time	Slow, deliberate, disciplined	Swift, efficient, impatient	Slow, calm, undisciplined	Rapid, quick, undisciplined



Chart the Social Styles of Your People

Find your comfort zone and help the people in your life feel comfortable.

Name	Analytical ✓	Driver ✓	Amiable ✓	Expressive ✓
WORK				
Board Chair:				
Boss/Supervisor:				
Direct Report:				
Direct Report:				
Direct Report:				
Direct Report:				
Direct Report:				
Person who bugs me the most:				
FAMILY				
Spouse:				
Father:				
Mother:				
Children:				
Children:				
Sibling:				
KEY DONORS				
Major Donor				
Major Donor Prospect				

Add: Volunteers, Vendors, Neighbors, Small Group Members, Board Members, etc.

RESOURCES:

- The Delicate Art of Dancing With Porcupines: Learning to Appreciate the Finer Points of Others*, by Bob Phillips (Regal Books, 1989)
 - This is the “Christian” version of social styles, written by Bob Phillips, former executive director of Hume Lake Christian Camps.
 - It is out of print, but used copies are available at Amazon.com
- How to Deal with Annoying People*, by Bob Phillips and Kimberly Alyn (Harvest House, 2005)
- The Social Styles Handbook: Find Your Comfort Zone and Make People Feel Comfortable With You* (Wilson Learning Library, Nova Vista Publishing, 2004)
 - Wilson Learning is the premiere training firm for social styles.
- Versatile Selling: Adapting Your Style So Customers Say Yes!* (Wilson Learning Library)
- Personal Styles & Effective Performance*, by David W. Merrill, Roger H Reid
 - This is the original, classic text book by the creator of social styles, David W. Merrill
- Social Style Assessment - <http://www.tracomcorp.com/training-products/profiles/profiles.html>

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Don't go another 30 days without starting your lifelong learning and mentoring experience with social styles. Your people and family will thank you!



9. THE TEAM BUCKET

CORE COMPETENCY

We believe that a balanced life honors God, each other, our families and our friends, so we leverage the unique set of talents and strengths given to each person by God. Thus we serve with more fulfillment and joy. We also leave work on time, physically and mentally.

Strategic Balls in the Team Bucket

- ❶ CREATE a time-block culture for your team.
- ❷ LAMINATE your strengths!

Where is your ORGANIZATION today? What's your 1-year goal?

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Where are YOU today? What's your 1-year goal?

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1 Create a Time-Block Culture for Your Team

Your work will never be done—so go home!

THE 21 TIME BLOCKS TOWARD A GOD-HONORING BALANCED LIFE!

	Sun	Mon	Tues	Wed	Thurs	Fri	Sat
Morning							
Afternoon							
Evening							

MY AFFIRMATION:

- My boss/spouse/family and I agree that on average, 7 out of 8 weeks, I will work a maximum of _____ time blocks per week.
- I will have two consecutive days off (6 time blocks) at least every _____ week(s).
- I will take compensatory time religiously.
- I will take holiday and vacation time religiously.

SIGNED _____ DATE _____

RESOURCES:

- Choosing to Cheat: Who Wins When Family and Work Collide* (Andy Stanley)

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Carl Bard said, "Though no one can go back and make a brand new start, anyone can start from now and make a brand new ending."



2 Laminate Your Strengths! (StrengthsFinder.com)

No one has the whole package, so leverage your Top-5 strengths!

IMAGINE!

WHAT IF EVERYONE ON YOUR TEAM

RECEIVED ASSIGNMENTS THAT LEVERAGED THEIR STRENGTHS?

“I will praise thee, for I am fearfully and wonderfully made.” (Psalm 139:4)

<ul style="list-style-type: none">• Achiever• Activator• Adaptability• Analytical• Arranger• Belief• Command• Communication• Competition• Connectedness• Consistency• Context• Deliberative• Developer• Discipline• Empathy• Focus	<ul style="list-style-type: none">• Futuristic• Harmony• Ideation• Includer• Individualization• Input• Intellection• Learner• Maximizer• Positivity• Relator• Responsibility• Restorative• Self-Assurance• Significance• Strategic• Woo
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Laminate Your Strengths!

JOHN PEARSON'S TOP 5 STRENGTHS

- 1. Focus.** You can take a direction, follow through and make the corrections necessary to stay on track. You prioritize, then act.
- 2. Responsibility.** You take psychological ownership of what you say you will do. You are committed to stable values such as honesty and loyalty.
- 3. Significance.** You want to be very important in the eyes of others. You are independent and want to be recognized.
- 4. Belief.** You have certain core values that are unchanging. Out of these values emerges a defined purpose for your life.
- 5. Maximizer.** You focus on strengths as a way to stimulate personal and group excellence. You seek to transform something strong into something superb.



The 34 Themes of Talent	Alan Smith	Ele Gonzalez	Betty Anderson	Carl Johnson
1st	Achiever	Strategic	Learner	Relator
2nd	Connectedness	Belief	Positivity	Individualization
3rd	Input	Ideation	Developer	Responsibility
4th	Intellection	Intellection	Harmony	Restorative
5th	Learner	Individualization	Connectedness	Connectedness
EXECUTING				
Achiever	Achiever			
Arranger				
Belief		Belief		
Consistency				
Deliberative				
Discipline				
Focus				
Responsibility				Responsibility
Restorative				Restorative
INFLUENCING				
Activator				
Command				
Communication				
Competition				
Maximizer				
Self-Assurance				
Significance				
Woo				
RELATIONSHIP BUILDING				
Adaptability				
Connectedness	Connectedness		Connectedness	Connectedness
Developer			Developer	
Empathy				
Harmony			Harmony	
Includer				
Individualization		Individualization		Individualization
Positivity			Positivity	
Relator				Relator
STRATEGIC THINKING				
Analytical				
Context				
Futuristic				
Ideation		Ideation		
Input	Input			
Intellection	Intellection	Intellection		
Learner	Learner		Learner	
Strategic		Strategic		

More info at www.StrengthsFinder.com

The "4 Domains of Leadership Strengths" (Executing, Influencing, Relationship Building and Strategic Thinking) are detailed in the book, *Strengths Based Leadership: Great Leaders, Team and Why People Follow*, by Tom Rath and Barry Conchie.



PROFILE OF THE PEOPLE IN MY LIFE!

Your Name _____ Date _____

Names →				
SOCIAL STYLE:				
<ul style="list-style-type: none"> • Analytical • Driver • Amiable • Expressive 				
STRENGTHS:				
1 st				
2 nd				
3 rd				
4 th				
5 th				
READER OR LISTENER:				
SPIRITUAL GIFTS:				
1.				
2.				
3.				

Your Management Team's Top 5 Strengths

Names →					
Strength 1					
Strength 2					
Strength 3					
Strength 4					
Strength 5					



RESOURCES:

- InSite Magazine* (May/June 2009): “The Strengths Mindset: Recognizing and Leveraging Your Team’s Best Qualities for Effective Ministry,” by Paul Kaak, assistant director of the Noel Academy for Strengths-Based Leadership and Education; and assistant professor at Azusa Pacific University. (Contact: ppkaak@apu.com)
- Book Summary (of two strengths books) at: www.strengthstest.com
- Strengths Finder 2.0* (Tom Rath)
- Strengths-Based Leadership* (Tom Rath and Barry Conchie)
- Now, Discover Your Strengths* (Marcus Buckingham & Donald O. Clifton)
- StrengthsFinder.com
- StrengthsTest.com (note: I just learned of this tool; can’t vouch for it yet.)

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Only 17 percent of the North American workforce plays to their strengths every day! Yikes! Ensure that STRENGTHS are a big deal in your organization.



10. THE *HOOPLA!* BUCKET

CORE COMPETENCY

We harness the power of *hoopla!* for celebration, recreation, intentional food and fellowship gatherings, and just plain fun. We thrive on knock-your-socks-off spontaneity. We believe *hoopla!* honors God. We budget funds for *hoopla!* to mitigate workplace stress and most importantly, to show our team members how much they are loved and appreciated!

Strategic Balls in the *Hoopla!* Bucket

- ❶ CELEBRATE the appointment of your new international executive vice president of *hoopla!*
- ❷ LAUNCH your *hoopla!* program with a knock-their-socks-off surprise event!
- ❸ AFFIRM your team with a F. A. X. (Flipchart Affirmation eXercise)!
- ❹ RECOGNIZE your team’s contributions with spontaneous *hoopla!*

Where is your ORGANIZATION today? What’s your 1-year goal?

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Where are YOU today? What’s your 1-year goal?

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1 Celebrate the Appointment of Your New International Executive VP of *Hoopla!*

From this moment forth, hoopla! is a core value.

H.O.O.P.L.A.

Honor team members with a year-round *hoopla!* culture.

Organize *hoopla!* events, parties and celebrations.

Overwhelm the team with spontaneous fun.

Pay the *hoopla!* bills from your *hoopla!* budget.

Laugh a lot—and inspire others to have fun.

Affirm and appreciate the team with regular doses of *hoopla!*

ANNOUNCE WITH *HOOPLA!*

- Morning email blast.
- Bulletin board memo
- Business cards

RESOURCES:

Article: "Hoopla! God Is Honored When We Have Fun!" (John Pearson in *Christian Management Report*, Nov. 1999)

BarbaraGlanz.com – The Employee Motivation Expert

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Hoopla! Is not what you do, it's a monthly summary of who you are and how much you enjoy working together.



2 Launch Your *Hoopla!* Program With a Knock-Their-Socks-Off Surprise Event!

Make emotional deposits in relational bank accounts.

HOOPLA! IDEAS

**A CHEERFUL DISPOSITION IS GOOD FOR YOUR HEALTH;
GLOOM AND DOOM LEAVE YOU BONE-TIRED (PROV. 17:22).**

Have a Ball at the Mall

Congratulations! You now hold in your hot little hands an envelope with cash that must be spent in the next 60 minutes at the mall next door. You may spend the money only on yourself. Buy whatever you'd like, except a gift card. Left over cash must be returned to me.

We'll meet at exactly 2:30 p.m. by the fountain for "Show and Tell." If you're late, you owe me 50 bucks! Ready. Set. Go!

Your Ideas:

- _____
- _____
- _____

According to The Carrot Principle, "one-third of the people you give a cash award to will use that money to pay bills. Another one in five won't have any clue in a few months where they spent the money or even how much they received." Think about it: A \$50 bonus check makes almost no impression, but a \$50 shopping spree with your co-workers is magic.

RESOURCES:

- The Carrot Principle: How the Best Managers Use Recognition to Engage Their People, Retain Talent, and Accelerate Performance* (Adrian Gostick and Chester Elton)
- Joy at Work: A Revolutionary Approach to Fun on the Job* (Dennis Bakke)

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Dennis Bakke's Joy at Work - Water Cooler Wisdom Rule #3: "*Attempt to create the most fun workplace in the world.*" (DennisBakke.com)



3 Affirm Your Team with a F.A.X. (Flipchart Affirmation eXercise)!

Write a word or a short phrase of affirmation for each person.

Flipchart Affirmation eXercise (F.A.X.)

Write your affirmations horizontally but don't affirm yourself!	Affirmations for Dick	Affirmations for George	Affirmations for Luis	Affirmations for Meri	Affirmations for Paul	Affirmations for Toni
DICK		<i>Deadline-focused</i>	<i>Cheerful servant!</i>	<i>Super Encourager</i>	<i>Incredible Thinker</i>	PRAYER WARRIOR
GEORGE	LOVES US		GENTLE ADMONIS HER	WOW!	DETAILED ANALYST	LISTENS TO GOD
LUIS	Thinks the best of us	Organized		Brightens the room!	Busy, but patient.	Random acts of innovation!
MERI	Positive	Lifelong learner	Restorer		REALLY SMART DECISION-MAKER!	faithful and fruitful
PAUL	Woo-er	Balanced discipline	High view of our customers!	Connects our dots with color		Wordsmith
TONI	Heart for God	Goodness	Low ego	Joy, joy, joy, joy, down in her heart!	FAITH!!!!	



4 Recognize Your Team's Contributions With Spontaneous *Hoopla!*

Keep your nose to the ground and ask, observe and experiment.

**THE RIGHT *HOOPLA!*
AT THE RIGHT TIME
FOR THE RIGHT REASON!**

IDEAS:

- Starbucks gift cards
 - 31 Smiles
 - Stress Reduction
 - Elevator Meeting
- Time Magazine Person of the Year (2006)
- Ban Boring Birthdays

- Sleuth for Success

The Carrot Principle features 125 recognition ideas. Here's Number 34:

“Each day, spend ten minutes looking for someone doing something that furthers your company’s goals. When you find it, recognize the person on the spot.”

- More ideas at BarbaraGlanz.com

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Take fun seriously. The morale, spirit and passion of your team are directly proportional to the amount of time and resources you invest in the *Hoopla! Bucket*.



12. THE VOLUNTEER BUCKET

CORE COMPETENCY

We reject the notion of a two-tiered Kingdom workforce. Instead, we seek to treat our paid volunteers (staff) and our unpaid volunteers with equal passion and intentionality. We will never have enough paid staff to accomplish our Kingdom assignments, so we continually hone our skills in volunteer cultivation, recruitment, orientation and engagement.

Strategic Balls in the Volunteer Bucket

- ❶ BLESS the socks off your volunteers (and walk a mile in their shoes).
- ❷ ESTABLISH S.M.A.R.T. goals for your volunteer program.
- ❸ VALUE your volunteers with full organizational support.
- ❹ CALCULATE the real costs of volunteerism.

→(For 6 more Strategic Balls in the Volunteer Bucket—see the PowerPoint.)

Where is your ORGANIZATION today? What's your 1-year goal?

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Where are YOU today? What's your 1-year goal?

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1 Bless the Socks Off Your Volunteers (and Walk a Mile in Their Shoes)

Eliminate anything that smacks of second-class status for your unpaid staff.

SCENARIO 1: SKIPPER THE INTERN

SCENARIO 2: JOAN OF ARKANSAS

What’s Wrong With This Picture?

- Why do we consistently hire the Skippers of the world when a Joan is patiently waiting in the pew—or in the nursery?
- Why do we impulsively hire paid staff and give inexperienced staff highly responsible assignments but require committed volunteers to work their way up (as if “up” is a biblical concept)?
- Why do we overwork our paid staff, but under-work and under-challenge our unpaid staff?
- Why are the reserved parking places and the anniversary pins allocated to paid staff?
- Why do some churches title their paid staff “pastors” or “directors” while none of their unpaid staff have comparable titles? (Where is that in my Bible?)
- What does payroll have to do with building the kingdom of God?

RESOURCES:

- Simply Strategic Volunteers: Empowering People for Ministry* (Tony Morgan and Tim Stevens)
- The Volunteer Revolution: Unleashing the Power of Everybody* (Bill Hybels)
- Church Volunteer Central – churchvolunteercentral.com

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Create a culture that honors paid staff and unpaid volunteers equally. **It’s not the paycheck that fosters effectiveness—it’s the passion.**



2 Establish S.M.A.R.T. Goals for Your Volunteer

Program

Elevate volunteerism with corporate goals that are Specific, Measurable, Achievable, Realistic and Time-related

The GNOME Chart: Annual Volunteer Goals

Goals	Needs	Objectives	Methods	Evaluation
Goal #1 for CULTIVATION is: _____		1.1) _____ 1.2) _____ 1.3) _____		
Goal #2 for RECRUITMENT is: _____		2.1) _____ 2.2) _____ 2.3) _____		
Goal #3 for ORIENTATION is: _____		3.1) _____ 3.2) _____ 3.3) _____		
Goal #4 for ENGAGEMENT is: _____		4.1) _____ 4.2) _____ 4.3) _____		

“When I ask long-term volunteers when they became ‘lifers’—people who decide to serve in God’s mission for as long as he gives them breath—they almost always point back to a specific serving moment that sealed their commitment. ‘In that moment,’ they say, ‘I felt the God of heaven and earth use me, and I discovered that there’s nothing in the world like that. It beats anything else I’ve ever experienced.’”

—Bill Hybels, *The Volunteer Revolution: Unleashing the Power of Everybody*

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!



3 Value Your Volunteers With Full Organizational Support

Enhance volunteer satisfaction and mission results.

The Volunteer Program Annual Check-up

The Seven Strategic Standards of an Effective Volunteer Program	Situational Analysis Today	Where We Want to Be in 12 Months	Next Steps and Ideas
1) We have a written volunteerism philosophy and an annual plan with S.M.A.R.T. goals.			
2) We have a volunteer coordinator who receives continuing training in volunteer management.			
3) We enhance the role of volunteers and ruthlessly eliminate anything in our corporate culture that smacks of second-class status for unpaid staff.			
4) We have one or more volunteer Senior Advisors who we honor publicly with "Dollar-a-Year" recognition (see the Delegation Bucket).			
5) We validate how much we value volunteers by providing superior organizational support in these key areas: <ul style="list-style-type: none"> • Volunteer budget • Volunteer position descriptions • Volunteer annual calendar of events • Monthly tracking of volunteer hours, achievements and results • Intentional volunteer celebrations, appreciation and <i>Hoopla!</i> • Two-way evaluations: (1) Annual evaluations of every volunteer and (2) Volunteer evaluations/feedback on the program and the organization • Newsletters, emails and/or websites, etc., specifically for volunteers 			
6) We constantly evaluate the impact and results of our volunteer programs versus employing people to do the same work.			
7) Our board members have clarity on the three hats they wear: the Board Member Hat, the Volunteer Hat and the Participant Hat.			

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!



4 Calculate the Real Costs of Volunteerism

Establish criteria to determine which jobs should be done by paid volunteers.

1. What is the real cost of the coffee and donuts?

2. Are the right volunteers on the bus?

3. Equipping the saints vs. paying the saints.

4. Leverage your volunteer’s spiritual giftedness.

- *What You Do Best in the Body of Christ: Discover Your Spiritual Gifts, Personal Style, and God-given Passion*, by Bruce Bugbee
- Willow Creek Association: “Network” curriculum – helping you get the right people in the right places for the right reasons (WillowCreek.com)

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

“Sustaining motivation is better understood as a by-product as opposed to a goal of itself. It is my experience that if you pursue discipleship with volunteers, motivation will follow. If volunteers see the fulfillment of their role as ‘obeying and serving God’ rather than serving you or your organization, it will cause motivation to swell.”

--Al Newell, High Impact Volunteer Ministry Development
www.ANANET.com



14. THE BOARD BUCKET

CORE COMPETENCY

We believe that board members must sense God’s call to serve on the board of directors. We invest time in cultivating, recruiting, orienting and engaging board members in their strategic role as stewards of our organization. The first step in organizational sustainability is to inspire board members to be highly committed and generous partners in ministry.

Strategic Balls in the Board Bucket

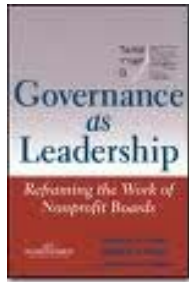
- ❶ RECRUIT for passion, not position.
- ❷ PRAY before prospecting.
- ❸ DATE before proposing.
- ❹ INSPIRE your prospect to give generously.
- ❺ PROPOSE marriage.
- ❻ CONTINUE dating!
- ❼ LEAVE a legacy.

Where is your ORGANIZATION today? What’s your 1-year goal?

	4 LEVEL OF MANAGEMENT KNOWLEDGE AND COMPETENCIES	TODAY	IN 1 YEAR:
Level 1	I don’t know what I don’t know.		
Level 2	I know what I don’t know.		
Level 3	I have an action plan to address what I know I don’t know.		
Level 4	I am knowledgeable and effective in this core competency and can mentor others.		

Where are YOU today? What’s your 1-year goal?

	4 LEVEL OF MANAGEMENT KNOWLEDGE AND COMPETENCIES	TODAY	IN 1 YEAR:
Level 1	I don’t know what I don’t know.		
Level 2	I know what I don’t know.		
Level 3	I have an action plan to address what I know I don’t know.		
Level 4	I am knowledgeable and effective in this core competency and can mentor others.		



**Governance as Leadership:
Reframing the Work of Nonprofit Boards**

By Richard P. Chait, William P. Ryan and Barbara E. Taylor

3 Modes of Governance:

Type I Governing: Fiduciary

Type II Governing: Strategic

Type III Governing: Generative Thinking*

*Sense-making

Reflective Practice

Personal Knowledge

Sensible Foolishness

Where Is Your Organization?

	Board Members Not Engaged	Board Members Engaged
CEO Engaged	Scenario 1: Leadership as Governance CEO Does the Governance Work!	Scenario 3: Governance as Leadership Board Members and CEO Collaborate on Governance
CEO Not Engaged	Scenario 2: Governance by Default Neither CEO nor Board Does the Governance Work!	Scenario 4: Governance by Fiat Board Members Do the Governance Work!



Evaluate Your Board's Effectiveness in the 4 Key Elements of Board Engagement:

- 1 - Very ineffective
- 2 - Ineffective
- 3 - Neither ineffective nor effective
- 4 - Effective
- 5 - Very Effective



	4 Elements of Board Engagement	Effectiveness Rating
1	Cultivation	
2	Recruitment	
3	Orientation	
4	Engagement	

Notes and Next Steps:



1 Recruit for Passion, Not Position

Invite the already convinced zealots!

1.
2.
3.

If you need a volunteer, recruit a volunteer.
If you need a board member, recruit a board member.



2 Pray Before Prospecting

Why settle for second best?

1.
2.
3.

“The problem is,
most board cultures are developed by default,
not by design.”

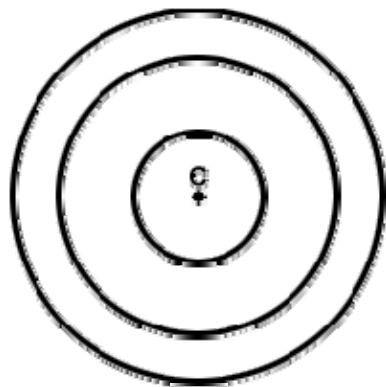
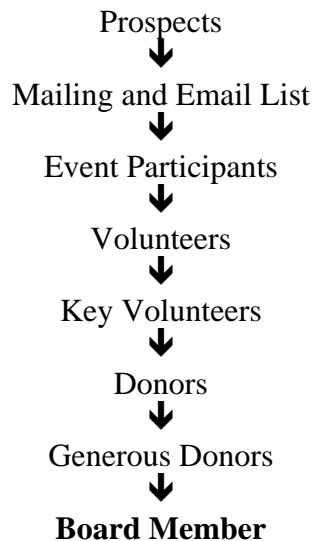
--Jim Brown



3 Date Before Proposing

Bring board prospects inside the circle of involvement.

1. The Circle



If Cliff turns out to be a lousy
volunteer,
DROP HIM!



4 Inspire Your Prospect to Give Generously

Model and teach The Treasure Principle

1. Where your treasure is, there your heart will be also. (Matt. 6:21). Read Randy Alcorn’s book, *The Treasure Principle*—and give it to your Top 500 donors and every board prospect.

2. The definition of a “Generous Giver”

My Largest Gifts (Total Giving) for This Year Will Go to:

Organization #1.....\$ _____

Organization #2.....\$ _____

Organization #3.....\$ _____

3.

Here’s the bad news: There are thousands of nonprofit CEOs that have “married” board members way too soon—and the commitment, the passion, the giving and the heart never followed. *Save yourself the agony and do it right by starting your prospect prayer list today.*



5 Propose Marriage

Once your prospects have moved into the generous giving circle, it's time to invite them onto the board.

1. Reminder!

NEVER, NEVER, NEVER
INVITE ANYONE TO SERVE ON YOUR BOARD
WHO IS NOT ALREADY A GENEROUS DONOR!

What about current board members who are not generous donors?

2. Board Nominee Orientation Notebook (see table of contents)

3.

Where this core value is practiced, a remarkable culture change happens on the board. Passionate, highly committed board members who follow their money with their heart become incredible zealots for your mission. **Wow!**



7 Leave a Legacy!

Grow a great board!

Two Chinese proverbs:

“If you want one year of prosperity, grow grain.
If you want 10 years of prosperity, grow trees.
If you want 100 years of prosperity, grow people.”

“The best time to plant a tree was 20 years ago.
The second best time is today.”

4 Parts to Effective Board Work:

1. Cultivation
2. Recruitment
3. Orientation
4. Engagement

Orient your board members! Board expert Jim Brown jokes that “a greeter at Wal-Mart gets more orientation than most board members ever do.” Here’s the formula for board success:

- Multiply the actual meeting hours invested in an annual board retreat times the percentage of board members who qualify as “generous givers.”
- If the number is under 1,000, sustainable success will be doubtful.

Your Summary here:



RESOURCES

Books and Resources

- Ram Charan, *Owning Up: The 14 Questions Every Board Member Needs to Ask*
- Richard P. Chait, William P. Ryan and Barbara E. Taylor, *Governance as Leadership: Reframing the Work of Nonprofit Boards*
- BoardSource, *The Nonprofit Board Answer Book: A Practical Guide for Board Members and Chief Executives* (Second Edition), (San Francisco, CA: Jossey-Bass, 2006). The second edition is based on the first edition, co-authored by Robert C. Andringa and Ted Engstrom.
- *BoardWise*, “the concise resource for stewardship and leadership,” is published bi-monthly for board members of Christian nonprofit organizations. John Savage is the managing editor and John Frank, president of The Frank Group, is the publisher. Bulk subscriptions are available at www.boardwise.net.
- Jim Brown, *The Imperfect Board Member: Discovering the Seven Disciplines of Governing Excellence* (San Francisco, CA: Jossey-Bass, 2006). Brown’s book speaks to both corporate and nonprofit boards. The story format has an unusual hero: a senior pastor. Read more at www.strive.com.
- John Carver, *Boards That Make A Difference: A New Design for Leadership in Nonprofit and Public Organizations* (Third Edition), (San Francisco, CA: Jossey-Bass, 2006). Every board member today must understand “policy governance.” Carver is the policy governance guru.
- Fredric L. Laughlin and Robert C. Andringa, *Good Governance for Nonprofits: Developing Principles and Policies for an Effective Board* (New York, NY: AMACOM, American Management Association, 2007). Andringa and Laughlin, partners in The Andringa Group have given a gift to nonprofit leaders with their “add water and stir” template for creating a board policy manual.

Organizations

- **BoardSource** (www.boardsource.org) was known previously as the National Center for Nonprofit Boards. It is the premier organization for nonprofit board governance resources and training.
 - Board and CEO job descriptions, etc., including their “E-Policy” documents for \$6.00 each
 - They also publish a bi-monthly magazine on board governance.
- **John Pearson Associates, Inc.** (www.johnpearsonassociates.com) provides board governance training, 360 CEO and board assessment tools, and strategic planning facilitation for boards and senior leadership teams.
- **The Andringa Group** (www.theandringagroup.com) is a group of consultants, led by managing partner Bob Andringa, that provides consulting and other services to both for-profit and nonprofit organizations.
- **Policy Governance**[®] (www.policygovernance.com) was created by John Carver and is “the world’s most complete theoretical foundation for the board’s governance role in business, nonprofit (NGO), and government organizations.” Jossey-Bass publishes 12 booklets in *The CarverGuide Series of Effective Board Governance*.



Creating Goal Alignment by Leveraging the 20 Management Buckets

- o This is the “Carver” governance model, named after John Carver (see his book above)
- o The CarverGuide Series of Effective Board Governance (12 booklets for \$10.95 each) available from www.josseybass.com.

12 Titles in the Series:

- | | |
|--|--|
| <ol style="list-style-type: none"> 1. Basic Principles of Policy Governance 2. Your Roles and Responsibilities as a Board Member 3. Three Steps to Fiduciary Responsibility 4. The Chairperson's Role as Servant-Leader to the Board 5. Planning Better Board Meetings 6. Creating a Mission That Makes a Difference | <ol style="list-style-type: none"> 7. Board Assessment of the CEO 8. Board Self-Assessment 9. Making Diversity Meaningful in the Boardroom 10. Strategies for Board Leadership 11. Board Members as Fund-Raisers, Advisers, and Lobbyists 12. The CEO Role Under Policy Governance |
|--|--|

OTHER MATERIALS

- Article by John Pearson, published by Christian Stewardship Association (Jan. 2007), *Six Best Practices for Recruiting Exceptional Board Members*
- Article by John Pearson, published by BoardWise (2007, Issue #3), *Leverage the Strengths, Styles, and Spiritual Gifts of Board Members*
- Article by John Pearson, published by ECFA, *Five Board Governance Trends: Results, Strategy, Assessment, Self-Evaluation and Caution (Focus on Accountability, 1st Quarter 2010)*
- Model Board Policies Manual (PDF) to clients of John Pearson, written by Bob Andringa
- Ten Attributes of Great Nonprofit Boards, by Bob Andringa
- Nonprofit Board Governance PowerPoint (from the one-day workshop for boards by John Pearson Associates)

WEBINAR ARCHIVES

6 Board Best Practices (see ManagementBuckets.com) – Link to CLA Webinar (2009)

WORKSHOPS

- John Pearson’s Nonprofit Board Governance Workshop (www.ManagementBuckets.com)
- ECFA FORUMS 2011: Board Governance (March 15, 2011 – Dallas) – www.ecfa.org
 - o Presented by John Pearson, Wes Willmer and Dan Busby

TO DO OR TO DELEGATE:

Point Person	Task	Deadline	Done!

Bucket Bottom Line:

Ram Charan’s Question 1: Is Our Board Composition Right for the Challenge?

“The role of the board has unmistakably transitioned from passive governance to active leadership with a delicate balance of avoiding micromanaging. It’s leadership as a group, not leadership by an appointed person.” He adds, “With the right composition, a board can create value; with the wrong or inappropriate composition, it can easily destroy value.” (*Owning Up*, by Ram Charan)



BOARD OF DIRECTORS – BOARD MEMBER ORIENTATION NOTEBOOK
ORGANIZATION NAME HERE

INTRODUCTORY MATERIALS	
1	Introduction from the Chairman of the Board of Directors
2	General Brochures, Publications, (eNewsletter, Website outline, etc.)
3	Historical Snapshot, Honors, Awards, Notable News Clippings

BOARD OF DIRECTORS	
4	Current Board Members (Mini-Bios), Committees and Volunteer Structure
5	Board Member Annual Affirmation Statement <ul style="list-style-type: none"> • Future Board Meetings • Letter of Invitation to Serve and Biographical Response Form
6	Nomination and Election Procedures
7	Bylaws, Articles of Incorporation, etc.
8	Board Policy Manual
9	Conflict of Interest Disclosure Letter
10	Former Board Members & Board Chairs
11	Board Meeting Agenda/Pages (of most recent meeting) – <i>sample</i>
12	Board Issues for Next 3 Years; Skeletons!

FINANCE, BUDGET, IRS, ECFA REPORTS	
13	Annual Budget
14	Current Financial Reports
15	Audited Financial Statements
16	ECFA Membership, Profile and Public Statistics
17	IRS Form 990 (<i>Return of Org. Exempt from Income Tax</i>)

STRATEGIC PLAN & METRICS	
18	Strategic Thinking/Planning Process & Strategic Plan Poster (11x17)
19	Annual Satisfaction Surveys
20	CEO Standards of Performance & Board/CEO Accountability Process (Dashboard)
21	Leading Indicators & Key Statistics (charts and graphs)
22	Peter Drucker's "Five Questions Every Nonprofit Organization Must Answer"
23	"Radar Issues" (One-Pager)

TEAM MEMBERS	
24	Organizational Chart & Mini-Position Descriptions: Staff Contact Info
25	Team Member Mini-Bios; CEO Bio, CEO "Strengths"
26	<i>Confidential Compensation Schedule</i>



DEVELOPMENT	
27	Donor Development Program - Snapshot
28	Direct Mail, Campaign/Project, Brochure Samples
29	Development Program Annual and Three-year Goals

PROGRAMS AND SERVICES	
30	
31	

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CLA Tele-Seminar

6 Best Practices for More Effective Boards

Presented by John Pearson
on March 27, 2009

http://www.managementbuckets.com/pages/6_BEST_PRACTICES

Click here to download the PowerPoint.

During this TeleSeminar, John Pearson shared six best practices to guarantee that your board is focused on strategic issues and not micromanaging your organization. Download these “add-water-and-stir” templates (below) and other helpful board governance resources and materials.

Click on these Word document templates and customize them for your unique board situation. The best practices include:

- #1. Annual CEO Standards of Performance (including your BHAG)
- #2. Monthly CEO Dashboard and Leading Indicators Report
- #3. CEO’s Monthly “5/15” Report to the Board
- #4. Annual CEO Assessment & Annual CEO Board Self-Assessment
- #5. Quarterly Board Meeting – Standard Template
- #6. Board Nominee Orientation Binder

MP3 Audio File or Audio CD. For information on ordering the one-hour recorded Tele-Seminar, visit: www.christianleadershipalliance.com/membership/phoneseminars.html or email Christian Leadership Alliance or call (949) 487-0900.



20. THE MEETINGS BUCKET

CORE COMPETENCY

We design meetings like an architect designs buildings. We have high expectations that our purpose-driven meetings will enhance team-building, accountability and our commitment to results. We value Holy Spirit-led meetings. We reject boring meetings.

Strategic Balls in the Meetings Bucket

- ❶ FOCUS on results with weekly one-on-one meetings.
- ❷ CREATE a welcoming environment for every meeting.
- ❸ MAXIMIZE results with four strategic meetings.

Where is your ORGANIZATION today? What's your 1-year goal?

	4 LEVEL OF MANAGEMENT KNOWLEDGE AND COMPETENCIES	TODAY	IN 1 YEAR:
Level 1	I don't know what I don't know.		
Level 2	I know what I don't know.		
Level 3	I have an action plan to address what I know I don't know.		
Level 4	I am knowledgeable and effective in this core competency and can mentor others.		

Where are YOU today? What's your 1-year goal?

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WEEKLY UPDATE TO MY SUPERVISOR (Page 1 of 2)

Email or hand deliver this update to your supervisor each week by Tuesday 4 p.m., in preparation for your one-on-one meeting each Wednesday.

DATE: _____

TO: _____

FROM: _____

1. My Snapshot:

My Top 5 Strengths From: <i>Strengths Finder 2.0</i>	1 2 3 4 5
My Social Style From: <i>The Social Styles Handbook</i>	<input type="checkbox"/> Analytical <input type="checkbox"/> Driver <input type="checkbox"/> Amiable <input type="checkbox"/> Expressive
My Top 3 Spiritual Gifts From: <i>Discover Your Spiritual Gifts</i>	<input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____
My Learning Preference	I am a: <input type="checkbox"/> Reader <input type="checkbox"/> Listener

2. My Supervisor's Snapshot

Top 5 Strengths	1 2 3 4 5
Social Style	<input type="checkbox"/> Analytical <input type="checkbox"/> Driver <input type="checkbox"/> Amiable <input type="checkbox"/> Expressive
Top 3 Spiritual Gifts	1 _____ 2 _____ 3 _____
Learning Preference	My supervisor is a: <input type="checkbox"/> Reader <input type="checkbox"/> Listener

3. Here's the status of my Job Success Tools:

Current: Yes or No	Job Success Tools	Date Approved
Yes/No	Position Description	
Yes/No	Annual Standards of Performance (SOPs)	
Yes/No	Annual Professional Development Plan (<i>The 3 Cs</i>)	
Yes/No	To Do List (A, B and C Priorities)	
Yes/No	Tickler Tracker (Daily/Weekly/Monthly/Quarterly/Annually Repeating Tasks)	

4. Last week, I made progress on the following:

5. This week, I am focusing on:



WEEKLY UPDATE TO MY SUPERVISOR (Page 2 of 2)

6. Before I make my decision, I need your advice on:

7. The monkey's on your back! I'm waiting on you for:

8. I am recommending that:

9. FYI! You should be aware of the following:

10. Overall, I am:

- OK Great! Never been better
- Overwhelmed Overloaded for the next ____ days
- Don't cancel our meeting! We need to talk!
- Help! I need more time with you. At least _____ hours in the next ____ days.
- Other: _____

11. Our next meetings are scheduled for:

Date	Day	Time	Major Agenda Item(s)

12. I continue to affirm our core value on "Truth-Telling." To my knowledge, I have not shared anything inappropriate with others about you (or another staff person) that I have not shared first with you (or the other person). And, to my knowledge, when others have shared something about you (or others) with me that may be "crossing the line," I have stopped them in their tracks—and reminded them about our core values—and urged them to share it with you (or that person) within 48 hours.

This past week, our working relationship has been:

- Excellent Great OK Could Be Better Poor
- You blessed me when you _____
- You bugged me when you _____
- I need _____ minutes with you to get into the "Tunnel of Chaos."

13. My Top 3 Standards of Performance *(These remain the same all year.)*

Here are my 3 Most Strategic SOPs that were approved by _____ on _____. I understand that the successful accomplishment of these SOPs is our primary focus in our weekly and quarterly meetings. They will account for about ____% towards my annual evaluation and future compensation adjustments. (Consequently, this weekly update focuses primarily on these three SOPs and their critical importance to the mission and goals of our organization.)

- 1.
- 2.
- 3.

NOTE: THIS WORD™ DOCUMENT IS LOCATED AT WWW.MANAGEMENTBUCKETS.COM UNDER "THE MEETINGS BUCKET."
Customize this template for your own use so the basic information remains the same each week.
[Internal Bureaucracy #98765, Rev. Jan. 2008 by GWB]



Yes!

I would like to receive your
complimentary weekly eNewsletter:

YOUR WEEKLY STAFF MEETING

"A BOOK AND A BUCKET ONCE A WEEK!"

SPONSORED BY CHRISTIAN COMMUNITY CREDIT UNION
www.MYCCCU.com

Name _____

Organization _____

Email _____

3 Options:

- Return to John Pearson
- email John@JohnPearsonAssociates.com
- Sign up online at JohnPearsonAssociates.com or at ManagementBuckets.com

**"Find out what you don't like
doing.....and stop doing it!"**

--Marcus Buckingham



JOHNPEARSONASSOCIATES

management and board governance consultants
P.O. Box 74985 ▲ San Clemente, CA 92673
www.JohnPearsonAssociates.com ▲ www.ManagementBuckets.com
John@JohnPearsonAssociates.com ▲ Mobile 949.500.0334



MY BIG BUCKET BEST TAKE-AWAY

This person, _____, will hold me accountable for our agreed-upon next steps, by this date: _____.