

## Time Management— Priorities and Tools

BY JULIE MIKUSKA



“I

never seem to get through my to-do list.”

“I keep getting sidetracked with last-minute requests.”

“I just don’t seem to be able to manage my time.”

Whether you work in a large organization or a small shop, there never seems to be enough time in the day to accomplish what you need to get done. If only you could manage your time better! However, is it really about time management?

Often you attribute a lack of time to your inability to manage it, but it is really about having a plan with priorities and making decisions about where your time should be spent. It is also about having the right tools and office infrastructure to support your priorities.

To illustrate, suppose you do a search for information about a donor. Do you find it in a central file with complete information also recorded in your donor relationship management (DRM) system (your database)? Or is the information you seek spread throughout several files in several offices—or not filed at all, or misfiled or, at worst, in the head of someone who no

longer works at your organization? Perhaps you find only a basic donor profile in your database, or it is recorded in a spreadsheet or even handwritten.

No wonder you never seem to have enough time.

### Set Priorities

According to the *2012 Fundraising Effectiveness Project (FEP) Report*, every \$100 gained in 2011 was offset by \$100 in losses through gift attrition, and every 100 donors gained in 2011 was offset by 107 donors lost through attrition. The report added that it costs less to retain donors than to attract new ones and that “taking positive steps to reduce gift and donor losses is the least expensive strategy for increasing net fundraising gains.”

In addition, the FEP report said it is necessary to look beyond an organization’s bottom line, which “does not tell management and boards what is really happening in their fundraising or where to invest additional resources to improve fundraising effectiveness.” You have to analyze the gains and losses to get the true picture.

What do these findings mean for you and setting priorities—and managing your time? First, it means you have to be good friends with your database. Analyzing your data will help you make decisions about where to put your time and resources. If you are losing major donors because you cannot find time to engage them (because you are spending too much time on direct mail), take a look at how effective all your programs are.

Andrey Kuzmin/Weer

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## Use the Right Tools

If you do not have a good DRM system, or if you are not using yours effectively, now is the time to make the investment. The time you spend getting this system to work for you will ultimately help you focus on your top priorities, whether you are an individual fundraiser or a senior manager.

DRM systems help you manage relationships with donors and prospects, as well as members or clients, depending on your organization. Your DRM is a research tool. Most vendors can help you set your reporting to suit your needs and provide training so you can get the most out of what you put in.

Also, make sure you are entering the data. In some shops, if the data are not in the database, they are not readily available. Many DRM systems are Web based, so it is relatively simple to enter information from your smartphone or while on the road.

The DRM is also a tool for tracking daily, weekly and monthly activity. Kyla Wiebe, development manager for Jocelyn House ([www.jocelynhouse.ca](http://www.jocelynhouse.ca)), a small-shop hospice in Winnipeg, Manitoba, is relatively new to fundraising but is using her DRM system to stay on track. “I’m a database person,” she says. “On a monthly basis, I run activity reports showing what I’ve done, what’s outstanding and what’s in the future. I put everything as a reminder and send notifications to Outlook.”

The other key tool to help manage time and set priorities is a centralized paper file system. Whether you are a solo fundraiser or in a large shop, make sure there are no shadow files and get information into paper files in a timely manner.

## Make Your Time Work Better for You

Kristine Betker, director of development for the Royal Manitoba Theatre Centre ([www.mtc.mb.ca](http://www.mtc.mb.ca)) in Winnipeg, says one of the biggest obstacles to managing her time effectively is interruptions—phone calls, staff dropping in and emails, to name a few. “I come in

early for some quiet time, and sometimes close my door or put out a virtual ‘Do Not Disturb’ sign and ask my staff to prioritize what they need from me,” she says.

Jason Fried, co-author with David Heinemeier Hansson of the book *Rework*, writes about new ways to conceive of work and creativity. In his Ted Talk “Why Work Doesn’t Happen at Work,” filmed in October 2010, he suggested having fewer meetings and replacing some face-to-face communication with email, instant messaging and collaboration tools. “Now, some people might say email is really distracting, and IM is really distracting and these other things are really distracting. But they’re distracting at a time of your own choice and your own choosing,” he says. “And there are very, very few things that are that urgent, that need to happen, that need to be answered right this second.”

Be disciplined about carving out time for priorities. Put them in your calendar and stick to them. Schedule time to engage donors, by phone or in person.

Question routine reporting. Is it necessary for a particular report to be generated every week? Is there a better way of sharing information? If you cannot avoid it, many DRM systems will allow you to create regular reports that

are sent directly to recipients at a time of your choosing.

Work back from deadlines to create timelines, then schedule in the tasks.

And learn to say “no.” Help yourself by delegating responsibilities.

Even if you are the only one in your shop, recruit volunteers to help you with tasks, research and strategy.

## “If I Had More Time ...”

Betker says if she had more time she would use it to think. She admits she gets caught in minutiae, making it difficult to think long term. “I’m a list person,” she says. “I have a book with tasks and in the back of the book is my ‘deep thoughts section.’ If I had more time, I would look at what’s in that section and do some blue-sky thinking.”

When she started her job a few months ago, Wiebe made calls to donors who hadn’t been contacted recently, but later she stopped making them in order to focus on more urgent priorities. “It was a nice connect,” she recalls. “Given the nature of this organization, creating those stronger relationships has a positive impact. I’d like to get back to those calls.”

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## Resources

*2012 AFP Fundraising Effectiveness Report*

[www.afpnet.org/files/ContentDocuments/FEP2012Report.pdf](http://www.afpnet.org/files/ContentDocuments/FEP2012Report.pdf)

*Time Management: 24 Techniques to Make Each Minute Count at Work* by Marc Mancini (McGraw-Hill, 2007), paperback, 64 pages

*Time Management In an Instant: 60 Ways to Make the Most of Your Day* by Karen Leland and Keith Bailey (Career Press, 2008), paperback, 160 pages

*Rework* by Jason Fried and David Heinemeier Hansson (Crown Business, 2010), hardcover, 288 pages

“Why Work Doesn’t Happen at Work” by Jason Fried, Ted Talk, filmed October 2010, posted November 2010, TEDxMidwest

[www.ted.com/talks/jason\\_fried\\_why\\_work\\_doesn\\_t\\_happen\\_at\\_work.html](http://www.ted.com/talks/jason_fried_why_work_doesn_t_happen_at_work.html)