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River Voices

Be Happy!

Workplace Effectiveness and Efficiencies

by Katherine Luscher • River Network • www.rivernetwork.org •

We all have probably been told that more money won't buy happiness. And we've all probably been open to the thought of testing that theory. But, even if money can't buy happiness, can happiness save money? According to Shawn Achor, author of *The Happiness Advantage*, happiness is associated with the joy we feel while striving toward our potential. It occurs along the way to achieving one's potential, not just once that potential has been achieved. It's important to organizations for their employees to be happy, and not just for the employees themselves. The greatest competitive advantage in the modern economy is a positive and engaged workforce.

The formula appears simple on paper. If you empower and engage employees in the workplace, you increase happiness and when you increase happiness, you are able to work towards your mission with efficiency and effectiveness.

Nonprofits tend to be experts at highlighting what we don't have, but perhaps we are not always as able to focus on what we do have. The reality is, we often don't have as much as we need in terms of staffing, resources and time. Luckily, there is something we do have: a job that is in sync with our values, a career that allows us to sleep at night (if we're not working late). A workplace that should, if properly managed, foster happiness.

While there is no one specific recipe for creating an efficient, engaged business (yes, nonprofits should be run like a business) there certainly are some guidelines to generate happiness and, in return, increase our effectiveness.

- **Benefits/recognition.** No matter how much we love our work and no matter how much work we have to love, everyone needs time off. And, I do mean off—as in unplugged. If someone is on vacation, don't expect her to check email, join meetings or answer voice-mail. As an organization, set the norm for defining 'vacation.' People who have the opportunity to decompress often return refreshed and more productive (either that or they turn in their resignation).

- **Continuous feedback:** Give appropriately timed and presented feedback, not just random feedback. Remember that feedback is not just for when things go wrong. Acknowledging good work is a huge motivator and helps create a healthy environment.

- **Common vision:** Share information about the organization and how individual jobs help achieve the mission.

- **Empowerment:** Research suggests that leaders can create the kind of workplaces that help people thrive by providing opportunities for decision making. Let your leaders lead, and if they make a decision different from yours but one that will still achieve the end-goal, honor their leadership role. Learn to differentiate between subjective and objective decision making. That is, is it a matter of something being blue or green, versus r something being legal or illegal.

- **Productive environment:** It may be hard to consider any work done in an office as 'great', but we can create inspiring and comfortable workspaces. From ensuring computers work and chairs promote good posture, to setting and reinforcing norms that provide civil and respectful behavior—there are myriad things that can be done to enhance the office experience.

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River Network

Connecting People, Saving Rivers

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NATIONAL OFFICE

209 SW Oak Street, Suite 300 • Portland, OR 97204

503/241-3506 • fax: 503/241-9256

info@rivernetwork.org • www.rivernetwork.org

River Network is a national, nonprofit organization whose mission is to empower and unite people and communities to protect and restore rivers and other waters that sustain the health of our country.

Editors: Katherine Luscher & Cara Meyer
Design & Layout: Sue Greer

FROM THE PRESIDENT


Photo Credit: Nicole Silk

Work. We spend a huge amount of time doing it—somewhere around half of our waking hours—and maybe more for those of us who care deeply about what we do, where our commitment isn't to a paycheck but to a cause. Yes, that means all of you.

We are lucky. Our jobs motivate us and give us personal satisfaction. Yet we too need to be careful not to overlook ourselves and our teams. We owe it to ourselves and our teams not to lose touch with what drew us to this work in the first place. The truth is, we could work 24/7 and still not get everything done for our rivers and waterways.

As with any business, we need systems and processes in place to help us set realistic expectations, manage our projects and commitments efficiently, and celebrate achievements. Those systems and processes, coupled with accountability and effective communications, can help us make the most of our time, guard against burnout, and give us clarity regarding how best to proceed. They can also help bring out the best in all of us.

Our work matters. It is essential to the health of the waters of our country. And investing in our most important assets—people—just makes sense. I hope you agree and consider what you can do in your own work environment to bring out the very best in yourself and your team. We hope you discover a new idea or approach in this issue of *River Voices* that helps your team and our community thrive!

Nicole Silk
River Network
President

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- **Open communication:** Yes, technology makes some communication easier, but there is nothing more effective and efficient than face-to-face communication; and when that is not possible, a phone call is far better than an email. Email has its place, but if you are looking to have a discussion, pick up your feet (or your phone).

- **Success:** People are happy when they are successful or a part of a successful team. Make sure they have they have the appropriate skills, the appropriate training and the appropriate resources. Know the strengths of your team and make a point not to set people up for failure.

If you are not convinced that happiness can help save money, Gallup provides statistics linking employee feelings and business outcomes. Disengaged employees' lost productivity costs U.S. businesses more than $300 billion a year. Three hundred billion! Warwick Economics Research Institute also suggests human happiness has large and positive causal effects on productivity. Positive emotions appear to invigorate human beings, while negative emotions have the opposite effect. The Warwick economists note: "Happier workers...were 12% more productive. Unhappier workers were 10% less productive."

Perhaps it is true: money can't buy happiness. But happiness can save your organization money. With just a few tweaks to the way you operate, your organization can and will become more effective and efficient. Who wouldn't be happy about that?

EMAIL ETIQUETTE #1

Include a clear, direct subject line.

People often decide whether to open an email based on the subject line. Don't just say "Hi!" or "From Hank" — or worse — use no subject at all. Examples of a good subject line include "March board meeting date changed," "Quick question about your TMDL presentation," or "Suggestions for the Megabucks proposal." Agree on acronyms to use that quickly identify actions. For example, your organization could use <AR> to mean "Action Required" or <MSM> for "monthly staff meeting," or <NRN> for "No Response Needed." If you reply to a message and change the subject matter, also change the subject line.

A Happy Worker Is a Productive Worker

By Marilyn Tam

Author of
The Happiness Choice

Unhappiness among workers in America is costing a shocking $300 billion per year in lost productivity, the Gallup-Healthways estimates. The recent Well-Being Index shows that Americans are increasingly unhappy with their jobs and work environments. When people aren't happy with their jobs or their employers, they don't show up consistently, they produce less and their work quality suffers. A 2011 Harvard Business Review article stated that the level of happiness has a profound impact on workers' creativity, productivity, commitment and collegiality.

Current American Psychological Association research findings show that people want contentment, love and happiness derived from meaningful work. They want nourishing personal relationships, a healthy mind and body, a spiritual core and a reason for living. But with only 24 hours in a day and all the competing demands of modern life, the question is—how? Is it even possible? How can you as a manager, facilitate your employees' happiness and consequently increase your organization's success as well as your own?

First you (as well as your organization) need a defined mission/reason for being. With an established purpose, you can manage and prioritize the energies and resources to best fulfill the mission. Work and life have meaning when we feel what we are doing creates worth and is in alignment with what we value. There are five life factors that need to be kept in dynamic balance to achieve and maintain happiness and productivity. Understanding people's motivators will help you to structure your work environment and to develop products and services that truly serve your customers.

1 **MONEY AND OTHER MEANS OF VALUE EXCHANGE**

In today's world, money is the primary (and sometimes the only) form of work compensation. Yet surveys have shown that the most effective motivator for increased performance and creativity is when one feels that his or her work has meaning and value. Understanding what drives people is helpful when designing incentive programs to increase satisfaction, and consequently, performance. Show people how their jobs impact the overall success of the organization's mission and tie their remuneration to their contribution to the objectives of the organization. That way they can comprehend how their efforts are intrinsic to the well-being of the organization and be motivated to fully contribute to its success.

2 **RELATIONSHIPS**

Human beings are inherently social. We need honest and positive connections with others to survive and thrive in the workplace, as well as in our personal lives. Healthy relationships will build trust and enhance openness and collaboration, instead of fear and reluctant compliance. Structure a participatory workplace environment and allow for some flexibility in work hours so that your associates have the ability to adjust their schedules when needed. When people feel that they are respected and trusted to perform at a high level, it encourages them to strive to do even better. Understanding human relationships, we can plan and act accordingly in business and life for greater productivity and satisfaction.

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3 **BODY**

The American Psychology Association tells us that *stress is a major cause of illness* today, and oftentimes workplace stress is the primary culprit. Sick or unhealthy workers are unable to function optimally and their performance suffers. Unhealthy workers also cost the organization more in healthcare costs and absenteeism. Encourage everyone to take their allotted vacation days. Time away rejuvenates the mind and body, and they will return refreshed and energized. Ensure that the mission of the organization is clearly shared with everyone, so that they understand that their work has meaning. People are happier and can do more when they feel that they are contributing to a worthwhile purpose.

4 **COMMUNITY**

Human beings need community in order to survive and thrive. When your organization is actively involved in the surrounding community you have a source of local support. Your community is also an excellent place to get input and feedback on your products and services. In today's global economy, your community encompasses the whole world, and that perspective will help you develop your organization's offerings to best suit the market. Encourage and support volunteerism in the communities your organization works in. Connect with businesses and other organizations that serve your market.

5 **SPIRIT**

A belief in something greater than ourselves sustains us when we are in pain, scared or in dire need. That same power enhances positive experiences and gives us more joy, compassion and energy. Recognizing the power of beliefs can guide your work policies to honor others' beliefs and facilitate their practice of them. When people feel respected for who they are and what they believe, they are happier and more productive individuals.

Increased productivity through happier employees can be realized with a modicum of energy exerted—by you and your organization's leadership—in the five areas above.

EMAIL ETIQUETTE #2

Use "reply all" sparingly

No one wants to read an email from 18 people when it has nothing to do with them. Yes, they could just ignore the emails, but many people get notifications of new messages on their smartphones or distracting pop-up messages on their computer screens. Refrain from hitting "reply-all" unless you really think everyone on the list needs to receive the email.

A Comprehensive Guide to Project Management Software Solutions

by Sarah Clare

Project Management Software

www.projectmanagementsoftware.com

The project management software industry is currently dominated by a number of key software big hitters, such as Microsoft and Oracle, and small independent companies, like Clarizen and Basecamp. This sector of the market has been holding steady in terms of demand and growth, but as companies increasingly turn to technical solutions for solving organizational and collaborative issues, this sector of the market is poised to grow.

There is a common misconception that project management software solutions are only required by IT teams and the technology industry. However, recent trends clearly show that all kinds of industries—including education, non-profits, construction, and manufacturing—are utilizing this software to tackle a number of complex project tracking and management issues. The right solution can provide individuals and teams in any setting with important tools that allow them to track the progress of a project, notice potential issues before they arise, meet deadlines, and collaborate more easily. The potential boosts in efficiency alone can lead to huge cost savings and an increased return on investment for small and large organizations alike.

Today, many organizations manage their projects by utilizing a number of disparate and disconnected tools, such as spreadsheets and online calendars, which were not necessarily designed for managing the evolution of complex or large projects. Although many project managers are aware of the existence of project management software solutions, most are unaware of the potential benefits of utilizing such software, and those who do realize the value struggle to commit to a single solution. Oftentimes, this is due to a lack of an understanding of what project management software is and how it affects the entire timeline, from a project's conception to its completion.

What is Project Management Software?

Project management software is any software solution that allows an individual or a team of people to track a project from its conception to its launch. This type of software typically provides project managers and other team members with a single access point to a wealth of pertinent information, including the scheduling of resources, budget management, time management, task assignments, quality control, bug/issue reports, documentation, and collaborative tools.

The goal of project management software is to increase efficiency by making the project development cycle more transparent for all involved team members. Each member of a team is typically provided with their own personal view, allowing them to track the specific tasks they are working on, and team members may be given access to other members' assigned task lists, so they can have a better understanding of how far into the development process the project has progressed. By creating a more transparent flow of information between project managers and team members, project management software aims to keep people on task and up-to-date on a project's progress.

Today, there are robust software solutions that can be utilized by any industry due to the scope of their features and their ease of use. However, some companies choose to purchase customized solutions that are marketed specifically to them. For example, it is common for non-profit organizations to implement

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cont. from page 7 project management software that has been specifically designed for tracking fundraising and other administrative activities.

How projects are typically managed without project management software

Depending upon the company and the type of project, the general project management scenario can play out in any number of ways. However, most, if not all, projects include several basic elements:

- **Scope:** Prior to beginning any project, experienced project managers will clearly define the goals of the project. This will include any and all tasks that are required to complete it and will also detail what should not be included in the scope of the project.
- **Resource allocation:** Team members and leaders will be assigned to the project and the necessary resources, including funding and equipment, will also be determined.
- **Timeline:** In order to ensure that a project actually reaches fruition, a general deadline is defined for the completion date. The timeline will also include dates for smaller milestones to ensure that all team members are on task.
- **Definition of deliverables:** The project is broken down into a series of small tasks. At this time, the manager and team members will define which tasks must happen in succession and which tasks may run concurrently.
- **Task assignments:** The project team may be divided into smaller teams, where each team is responsible for an individual task or a set of tasks. Alternatively, tasks may only be assigned on an individual basis.
- **Risk planning:** Potential obstacles and issues will be clearly defined and comprehensive plans will be drafted to set forth risk handling priorities, actions, and resources to be allocated to problems which may arise.
- **Monitoring:** The project manager and other team members will continuously monitor the project's progress, including measuring ongoing activities, expenditures, remaining finances, total time spent by all team members, and performance in comparison to the project's baseline (i.e. where the project is vs. where the project should be). During the monitoring process, risk strategies may may be executed.
- **Quality control:** Each deliverable will be assessed and managers will determine whether deliverables can be marked as complete or if they should be sent back for further improvements. In some cases, managers may decide that new deliverables must be defined for the project to reach fruition.
- **Closing:** Once all necessary tasks have been completed successfully, the project will be marked as complete. Alternatively, the project may be put on hold or closed prior to completion if funding runs out or if it is determined that the scope of the project cannot be achieved.

In order for a project to be completed successfully and on time, each task and phase of the project life cycle must constantly be tracked and the lines of communication between employees must always remain open. To achieve this, most companies will utilize a number of different digital and analogue tools that may or may not be connected to one another. Additionally, all members of the team may not be using the same tools in order to manage their tasks and timelines.

Common resources that are used for project management include, but are not limited to:

- **Private calendars:** Team members will typically keep digital or paper based calendars to help them track their deadlines. It is also common for people to utilize both types of calendars simultaneously.
- **Group/shared calendars:** A group calendar may be located online, where it can be accessed by all team members 24 hours a day, on a local network, or it may be located in a common place, such as a highly visible whiteboard. Project groups may also utilize shared calendars through a shared application or by giving team members access to their private email calendars.
- **Spreadsheets:** Spreadsheets are often used to plot out timelines, define budgets, track resources, and create various types of reports. They may be shared via email or team members may maintain individual spreadsheets for their own use.
- **Private or shared accounting software:** This software may be used by individual members who maintain their own records or central access may be given to all necessary members, so a single shared budget can be tracked and maintained.
- **Notes:** These may be handwritten on a variety of media, including notebooks, loose sheets of paper, or even post-it notes. They may also be typewritten and saved in a variety of electronic documents. In some cases, they may be recorded as audio. Notes can originate from a number of different sources, including email communications, team meetings, one-on-one discussions that are either in person or over the phone, and individual research.

EMAIL ETIQUETTE #3

Keep messages brief and to the point

Make the most important point first, then provide detail if necessary. Make it clear at the beginning of the message why you are writing. There is nothing worse for the recipient than having to wade through a long message to get to the point. Worse, if you send long messages, it is much less likely that the person will act on what you have sent or respond to it. It's just too much work. It often gets set aside and, unfortunately, forgotten.

- **Whiteboards:** It is quite common for project managers and team leaders to define tasks and record valuable information on whiteboards that other team members have regular access to.
- **Email:** Emails may be passed back and forth between project leaders and team members regarding deliverables, changes in scope, and any other important issues regarding the project. It is also common for members to send important, and possibly sensitive, electronic documents to one another, including contracts, budgetary information, and detailed timelines.
- **Instant messaging software:** For quick answers, members will IM one another with questions and concerns.
- **Video chat/meeting software/ conference lines:** Groups which contain members who are in remote locations typically use these services to hold meetings.

When using multiple project tracking tools that are disparate, such as those listed above, project managers and team members may have serious difficulties managing and monitoring the lines of communication. It is not uncommon for a paper-based or email memo to be received by an employee and to go ignored for

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lengthy periods of time. In some cases, the memo may never be seen, unless another team member specifically draws attention to it, causing serious delays in progress.

Additional issues and inefficiencies tend to arise when project members are required to track multiple resources when trying to understand what their deliverables are, when they are due, and where the project as a whole stands at any given point in time. Sifting through a mixture of information that is located in spreadsheets, paper-based notes, electronic documents, and on whiteboards takes up valuable time and decreases individual, as well as team, productivity. Further issues may arise if members need to contact one another to gain access to important data that is crucial to their assignments, but are unable to make contact in a timely manner. As all of these issues compound during the development timeline, the project's final deadline is less likely to be met and it is highly likely that the budget will be exceeded, decreasing or eliminating the projected profits from the project.

How Project Management Software Streamlines the Process

When the correct project management solution is implemented and employees are appropriately trained to use the software, the likelihood that important deadlines are met and budgets are not exceeded greatly increases, potentially leading to a greater return on investment. There are several benefits to deploying project management software:

- All team members can manage their project timelines and calendars within a single computer application.
- Team calendars for shared use, as well as private calendars for individual use, can be created at any time.
- All budgeting information can be maintained within the application.
- Project managers and other employees can easily prioritize tasks, set new tasks, and assign tasks to others.
- Team leaders can provide instant assessments on newly delivered items.
- Employees will have ongoing access to a central database containing all documents regarding the project.
- Members have the ability to create their own personal views to help them manage their tasks and deliverables.
- Team members will have access to a list of tasks that have been assigned to all other members.
- Workers can report their progress and projected progress in a shared view, allowing other team members to easily understand where the project stands in comparison to the project's baseline.
- Employees can communicate with one another in real-time and leave each other messages.
- All communications can be logged and tracked from within the software.
- The amount of time spent on each task can be easily tracked.
- Reports, such as budget and timeline reports, can be compiled from the data and printed out for presentations or personal records.

Small and large organizations rely on project management software to increase efficiency, productivity, and transparency by giving every team member access to a single tool which allows them to manage and track their projects from the beginning stages to completion. Utilizing a dedicated software solution reduces the number of communications that are required to complete a project and increases each member's accountability for their assigned duties. Team members can also proactively take on new tasks if others are behind on their assigned duties, decreasing lag times and increasing the likelihood that the project will be completed on time and successfully. It is important to note, however, that project management software cannot and will never replace the need for dedicated and experienced project managers.

When to Invest in Project Management Software

Any company that runs multiple projects simultaneously as well as those that have teams of three or more people working on a single project should seriously consider investing in a project management software solution. Additionally, such a solution is absolutely vital for teams containing people who are dispersed across multiple offices, since it provides all team members with access to a centralized information database that reflects real-time updates.

Although it was once true that only large businesses with high revenues could consider project management software due to high costs, there are now solutions which can fit into any budget – including those for most nonprofits. If any of the following statements can be used to describe a company, it should consider implementing a software solution:

- Employees frequently work on multiple projects simultaneously and may even belong to multiple teams.
- Our projects are usually completed after their deadlines.
- We frequently start projects and terminate them prior to completion due to poor planning or budgetary constraints.
- The quality of our projects is declining.
- Our profits have decreased due to poor project planning and project failures.
- Projects are often put on hold for indefinite periods of time to allow project managers to redefine the scopes or search for new funding.
- We frequently exceed our projected, or allowed, budgets.
- We often experience obstacles that we are completely unprepared for.
- Mistakes which can easily be prevented through appropriate monitoring occur quite often.
- Team members find it difficult to track their assigned tasks and deadlines.
- Team members have no means for easily figuring out where we are in the project timeline.
- Employees sometimes finish their assigned tasks, but are unable to take on new tasks because they have no means of finding out which tasks have yet to be completed.
- Resources are often overbooked or double booked, leading to delays or budget extensions.
- Team members frequently miss vital communications or do not see them quickly enough.
- Project managers are growing tired of repeating themselves.
- Miscommunications are leading to delays and sometimes cause employees to work on the wrong tasks or complete tasks improperly.
- Project managers must email, call, or meet with individual team members any time a progress report is needed or a change to the project plan is made.
- Important deadlines are often missed because employees are unable to reach the necessary team members on time.

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- Project members occasionally miss important meetings because they are unaware that those meetings have been scheduled.
- Our team members are scattered across multiple locations.
- Team members do not have access to a centralized project calendar which details every step within the project timeline.
- We do not have a centralized database containing important documents that pertain to each of our projects.
- Every project member must monitor several lines of communication.
- When providing employees with quality control reports on their deliverables, each report must be emailed, hand delivered, or mailed.
- We do not have a method for easily tracking all reported bugs.
- The same bugs show up frequently, even though we have dealt with them before.
- Project managers do not have any reporting templates to work with.

Types of Project Management Software

Project management software is currently available as a self-hosted and cloud-based solution. Today, cloud-based systems are growing rapidly in popularity and self-hosted solutions are beginning to lose their steam.

Self-hosted applications are hosted on your company's servers and allow team members to access information from a central location. These solutions make it much easier for team members to collaborate, since they are able to access group calendars and communicate through a central tool. They also offer highly stylized interfaces and very fast response times for users, since they are located and run from the local network. However, they can be quite costly and may be out of reach for most small organizations, since the cost of such software can be quite high and additional costs must also be accounted for, such as the purchase and maintenance of servers. Additionally, the IT team will have to dedicate time to regular maintenance duties to ensure that the software remains up-to-date and optimized.

Cloud-based project management solutions are located online and can be accessed via Internet browsers from any computer at any time. Since they are located in the cloud, a company's IT team will not have to maintain the software or any additional hardware. Instead, the software's manufacturer will perform all updates and ensure that their servers are backed up and running at all times. Cloud-based applications make it easy for team members to collaborate in real-time and many companies find that these solutions are far more affordable than self-hosted solutions. However, internet outages at your offices will limit access to the project management tools and slow Internet connections will result in slow software response times.

Common and popular features

Each project management solution will offer its own set of features and add-ons. The following list provides a summary of the most popular features that are available today:

- **Web-based interface:** All team members can access the full features of the application any time and anywhere by going online and logging into their accounts.
- **Personal dashboard:** Each team member can customize the dashboard, which is similar to a home page, to

display the information they wish to regularly access. The information is updated in real-time and may include anything from new messages to task lists and calendars.

- **Project dashboard:** This screen is typically customized by the management team and provides a graphical view of the project's status. Data is instantly or regularly collected from all team members and used to update the project dashboard to provide team members with up-to-date information.
- **Multiple dashboards:** This feature benefits individuals and teams that work on multiple projects simultaneously by allowing them to access all of their active projects through a single user interface.
- **Restricted access:** Choose which team members can access which features and views within the application. For example, it may not be necessary to allow all team members to access budget and expense data.
- **Budget tracking:** Define and update all aspects of a project's budget and expenses in a centralized location. Reports can also be compiled on the status of the budget.
- **Calendars/schedules:** Individual and group calendars can be used to track deadlines for all assigned tasks. Individual calendars can be updated by project managers and synced with the group calendar. The group calendar can be accessed by all project members and provides them with a view of all of the past, present, and future project tasks and deadlines. Calendar data may also be available in a Gantt Chart view.
- **Third party calendar integration:** Sync a schedule, or calendar, from the project management software with a third party calendar, like Google Calendar, iCal, or Outlook.
- **Time tracking:** Find out how much time was spent on a task or an entire project and compare actual progress to planned progress. Some solutions allow these reports to be exported as spreadsheets.
- **Task lists:** Team members can create individual to-do lists, including each item's deadline, and mark them off as they are completed.
- **Task assignments:** Project managers can automatically assign tasks to project members or request a specific team member to accept the task.
- **Resource allocation:** Create and manage all resources required for a project. It is also possible to define the worth and availability of each resource, while tracking which resources have been overbooked or under-allocated.
- **Centralized document database:** Store a wide variety of files in a single easy-access location. The database can also be used to backup additional project data.
- **Version tracking:** Tracks and logs all project-related documents, including uploaded attachments, as they evolve over time.
- **Risk management:** Team members can raise flags over potential risks which may occur and their consequences. Risks can be rejected by project managers or accepted and categorized according to type and risk level. When an obstacle occurs, the task of resolving it can be assigned to the relevant team member.
- **Instant messaging:** Team members can leave each other private messages and communicate with one another in real-time. All messages are usually saved until the recipient deletes them.

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- **Discussion boards/forums/digital whiteboards:** This tool allows members to publicly communicate with one another and discussion boards can be customized to include categorized sections, making it easy for team members to join only the discussions that are relevant to them.
- **Email notifications:** Any time a change is made to the project or a message is received, an automated email notification will be sent out.
- **Templates:** Create project templates to be used as the basis for each new project. Templates can also be used for messages, schedules, reports, task lists, and dashboard customization.
- **Advanced reporting:** Status reports can be customized to include a wealth of information, including budget, expense, risk management, scheduling, and task data. Reports can be compiled for the project as a whole or for individual performance reviews.
- **Customizable charts and graphs:** Display all kinds of data, including budget and project health information, in bar graphs, dot charts, and pie charts.
- **Multilingual support:** Some applications can be translated into multiple languages.
- **Mobile device support:** Access the software from a smartphone via an optimized Web interface or an installed mobile phone app.
- **Add-ons:** Purchase additional apps to expand functionality or further customize existing software features. Some add-ons may be used to offer increased third party software integration, such as syncing with accounting or scheduling software.
- **Professional support:** A support representative may provide initial training as well as ongoing technical support.

Cost

The costs of project management solutions vary greatly and range anywhere from costing nothing to thousands of dollars. Many solutions also employ a number of different pricing structures, and a single solution may utilize more than one method when determining the final cost. Today, the following pricing structures are popularly used: ongoing monthly fees, one-time only fees, cost per user pricing, and feature-based pricing.

When determining the cost of a solution, several things must be taken into account, including the cost of the software itself, deployment costs (may include adding new hardware to existing infrastructure), any ongoing fees from the manufacturer, and the costs associated with allocating resources, such as additional man hours, to its deployment and maintenance.

For most small organizations, as well as those with small budgets, cloud-based solutions will offer the highest level of affordability due to their self-maintenance and monthly pricing plans. Excluding freeware options, these solutions typically employ monthly fees that are based upon the number of licensed users and the selected package of features. Fairly robust applications, which may include everything from scheduling to risk management and collaboration tools, start at as little as $20 per month for a single user or $45 per month for an unlimited number of users. On the higher end, some of the most robust solutions—which offer unlimited users, large storage space, advanced reporting, ongoing technical support, and the ability to add custom apps—range anywhere from $140 per month to well over $700 per month.

Larger organizations with high revenues and those with dedicated IT teams can consider self-hosted systems, in addition to cloud-based applications. Self-hosted solutions typically employ a one-time only fee that is based upon the number of licensed users and the chosen feature package. However, the final cost may also include additional hardware and maintenance costs, such as paying for software upgrades and additional man hours. At the low end, a fairly robust option for a single user license will run between $250 to $350, while a ten license pack typically costs between $1,000 to $1,900. Packages that contain a full suite of features as well as the option to have an unlimited number of users and projects running will typically cost between $4,000 and upwards of $10,000. Some companies may also charge an additional annual registration fee on top of their quoted prices in order for the software to remain active.

Although the cost of a solution will be a key factor during the decision making process, it should not be the driving factor behind choosing a project management software package. Too often, companies will equate high costs with high quality, only to find that the chosen solution does not improve their efficiency or the quality of their work. Similarly, an application should not be purchased simply because it is the only solution that can currently be afforded. Instead, each solution should be considered at length and evaluated according to its features and usability.

How to Choose the Right Project Management Software Solution

Choosing a project management solution will take time and serious thought should be given to each available package. Before committing to a solution, the following points should be considered by any and all companies:

1. **Decide whether a cloud-based or self-hosted solution is right for your company.** If money is tight and/or IT resources are highly limited or non-existent, cloud-based solutions will offer the most flexibility and the highest level of usability. Companies that can dedicate large amounts of cash and resources to deployment and maintenance will be free to choose between both types of solutions.

2. **Set a budget**. Since the cost of a project management solution can range anywhere from $0 to well over $10,000, it is important to determine a preferable purchase price as well as a ceiling price. Use the budget to guide the final decision, but be sure to figure in any ongoing costs, such as monthly or annual fees and maintenance costs, prior to selecting a solution.

3. **Create a required feature list.** Understanding the needs of project managers and team members is vital to making the right purchasing decision. Gather the whole team around for a meeting to discuss current and expected obstacles that hinder the progression of projects and find out what each team member needs in order to address those issues. It will also be useful to make a list of non-required, but desired, features.

4. **Prioritize your needs.** It may not be possible to get all of the required features in an affordable package. Prioritize the required feature list to figure out which features are vital to completing projects successfully and which features can be overlooked for the time being.

5. **Figure out how many user licenses are needed.** Since many software manufacturers offer different packages

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cont. from page 15 based upon the number of licenses required, it is important to figure out the maximum number of users required. A common mistake that many companies make when determining this figure is to assume that project members will be able to effectively share the same logins with one another. For maximum efficiency and productivity, each team member should have their own seat.

6 **Think about how many projects will be running simultaneously.** Some solutions will only allow a single project to be tracked, while others may offer the ability to track multiple projects at once. Each solution typically places a limit on the number of active projects, so it's important to find a product that can accommodate all of your projects.

7 **Determine the maximum amount of required storage space.** Every running and archived project, licensed user, communication, and uploaded document will take up server space. To ensure that the chosen solution is able to accommodate your needs as projects grow, select a package that offers more space than you feel you need.

8 **Check for compatibility.** When choosing a cloud-based solution, ensure that all of its features and functions will display and function correctly in the web browsers used at your offices. For self-hosted solutions, ensure that the software is compatible with your servers and operating systems.

9 **Opt for advanced reporting.** Most project managers need to compile regular progress reports on budgetary and performance data in a variety of formats. Select a solution that makes this easier by providing you with a number of templates and report types to choose from.

10 **Consider third party integration.** It may be necessary to sync the project management software with other computer applications, such as scheduling and budgeting software. Integration makes this process easier through automation.

11 **Opt for customized dashboards/views.** Every team member needs instant access to the project data that is most relevant to them. Choose a solution that allows for the creation of individual and shared dashboards.

12 **Think about communication needs.** Some solutions offer instant messaging, message boards, and email functionality. Giving team members a centralized location for all of their communication needs may increase productivity and decrease errors.

13 **Consider deployment.** Some solutions may take more time, money, and effort to deploy than others. Find a solution that can be deployed on time for your next project without maxing out your available resources.

14 **Always try before you buy.** Most project management software solution providers will give you access to video and live demonstrations of their software. Some go a step further by giving the project manager and a select number of team members access to the full package for a limited time. Never commit to a solution until you've tried it or seen it in action.

EMAIL ETIQUETTE #4

Don't reply in anger.

In the heat of the moment, you can type some brilliant replies. People tend to say things in writing that they would never have the guts to say face-to-face. This is precisely why you should never, ever fire off an email in anger. They almost never serve their purpose or your long-term interests. They burn up realtionships faster than just about anything you can do. If it makes you feel better, go ahead and write the message, then delete it. Usually a day or two after you didn't send an angry email, you'll understand the wisdom of restraint.

Popular Project Management Software Solutions

Microsoft Project: This self-hosted solution is one of the most popular options amongst both large and small organizations alike. Microsoft Project features an intuitive interface that will be very familiar for any current and past Windows users. Notable users of Microsoft Project include Nasa, Volvo, and the Coca Cola Bottling Company. Key features include user-controlled scheduling, task assignments, resource planning, and automated project status updates. Microsoft Project also offers integration with a number of other Microsoft products, such as SharePoint, Excel, and Word. Additional noteworthy features include project templates, advanced reporting, and the ability to collaborate through Microsoft SharePoint.

Basecamp

Basecamp is a web-based solution that offers the ability to easily collaborate and track progress via any internet browser. Due to its ease of use and low pricing plans, it is popular amongst both small and mid-sized companies. However, large companies, such as Kellogg's, National Geographic, and Adidas also rely on this solution for their project tracking needs. Basecamp features a wealth of online tools for communication and collaboration, including a public message board, personal messaging, and automated email notifications that can be triggered any time a change to the project has been made or a communication has been received. Other key features include a central database for project-related documents, personal task lists, time tracking, scheduling, project templates, and multilingual support.

Intuit QuickBase

This cloud-based software solution is popular amongst big businesses, including Google, Chevron, and eBay. QuickBase is known for its high level of customization, rich list of features, and ability to integrate with third party software. Key QuickBase features include easy data importing from a variety of sources, such as Excel spreadsheets, customizable forms and project templates, automated email notifications, and advanced reporting. It is also possible to automate tasks, build a document database, and access the software through any Internet browser at any time.

FogBugz

FogBugz is a self-hosted and cloud-based project management tool that is known for its advanced reporting functionality, user friendly interface, and ability to drill down into data at a very granular level. Due its diverse range of plans, it will appeal to organizations of any size, but it will be better suited to projects involving software or hardware development. Noteworthy FogBugz users include Amazon.com, Intel, and the BBC. FogBugz allows project members and team members to easily track bugs, scheduled items, and customer comments. Additional features include an advanced search, hierarchical task views, the ability to track a project's timeline in multiple formats, and a developer history. It is also possible to receive and sort incoming emails from existing customers and create tasks from messages.

huddle™

This cloud-based solution has a wide range of plans that will appeal to small and large organizations alike. It also offers mobile device support, so project members can access their work from anywhere at any time. Notable Huddle users include Boots, Kia Motors, and Fujitsu. Key Huddle features include customizable dashboards, an advanced search, project archiving, and online file sharing. Collaboration is also simplified through a central discussion board as well as a digital whiteboard that can be used for brainstorming. Both the discussion board and whiteboard track and save every comment that has ever been posted.

@task™

@task is a cloud-based solution that is typically employed by mid-sized and large companies. It is platform independent and can be accessed from any Internet browser. Noteworthy @task users include Toyota, Apple, and HBO. Key features of this software include a high level of customization, the ability to build multiple dashboards, configurable reports, templates, and resource assignments. A document database, portfolio manager, and time sheets are also included. It is also possible to establish a help desk and track issues within the application.

For the full article and an extensive list of project management software options, please visit www.projectmanagementsoftware.com.

Getting the Most Out of Your Meetings

by Peter Lane

Institute for Conservation Leadership

www.icl.org

One of the best ways to scare off new members, volunteers, or potential leaders is to hold meetings that drag on forever, have no clear direction, and are dominated by one or two people who think they have the answer to everything. Good meetings will increase attendance and engagement over time, and help your organization attain its goals. Good meetings happen when:

- They start and end on time.
- Everyone participates.
- The decision-making process is clear.
- The group is oriented to finding solutions rather than taking a stance.
- Everyone knows what their commitment is after the meeting.
- People have fun!

But how do you make sure that all happens? Here are a few steps that will help:

Plan! Plan! Plan!

Good meetings just don't happen; you have to prepare for them. Send an agenda in advance that clearly states the purpose or goals, topics that will be discussed within a suggested timeframe, and identify what will happen for each topic:

- Report only
- Report and discussion
- Input
- Decision

If you are going to ask people for input on something or to make a decision, send supporting materials or background information in advance. If the meeting is for reporting only, consider whether it can be done in some other way. Meetings that are only about reporting are dull! The more interaction and decision-making involved, the more appropriate it is to hold a meeting (and interesting!).

Make it happen

Start the meeting on time and review the goals and agenda, roles of everyone there, and the decision-making process. Ask everyone to introduce themselves and go over ground rules (or create them) for how together you will take responsibility for a successful outcome. Sequence activities and discussion so that the flow is from information, to interpretation and analysis, to decision. Summarize and end on time; clearly state what actions will be taken, who is responsible, and when the deadline is. Thank everyone for their participation and connect to a larger purpose of why you have come together.

Don't forget logistics

Make sure the room you have chosen is large enough for everyone who will attend. Is there adequate lighting and can chairs, and tables be moved to meet the needs of your group? If using video, is the camera positioned to capture everyone's face (and not the backs of laptops). Will people be able to see each other easily? Be clear about the location and provide directions. Offer refreshments: people are more productive when they feel they are being well-cared for.

What Do You Do When…

Everyone has probably experienced some typical meeting behavior. Even if you are not the facilitator, you can have a positive impact on the meeting by how you interact with others. This requires that you pay attention to both what people are saying (the "content") and how they are interacting (the "process"). Here's a few tips on how to address some common behaviors:

The Non-Stop Talker: Thank this person for his/her views and suggest that it is important for the group to get everyone's opinion or perspective. Check your ground rules. Is there one about hearing from everyone?

The Deflector: It can be frustrating when new agenda items are brought into the conversation or someone is straying off topic. Make an observation to the group that there is more than one topic being discussed (name them) and ask the group what is most important to focus on right now. You can also set up a "bike rack" where you can list topics for discussion later or at another meeting.

The Silent Type: People process information differently and some find it difficult to speak in front of the whole group, especially if they are new to it. Make sure your agenda includes time for people to jot down their ideas before speaking, or you give time for people to talk in pairs or small groups.

The Late Arriver/Early Departer: Take a moment to welcome the Late Arriver and summarize where the group is at. If possible, let the group know that the Early Departer needs to leave; thank them for their participation and let him or her know that someone will follow-up.

When it's all over

Send meeting notes within one week of the meeting, if not the same day. Make sure all action items are completed and begin planning for the next meeting.

Meetings at a Distance

Technology now allows people to meet in a variety of ways while not actually physically being in a room together. While remote meetings bring new efficiencies and opportunities to get work done, especially when people are not located near each other, they are not effective for groups of 8 or more unless one person is simply reporting information or explaining something. They work best when people have met each other in person.

If you are facilitating a remote meeting and using online technology, upload the agenda or other materials so everyone is looking at the same thing. Many online services allow real-time document editing, a white board to write on, or a "hand up" function when someone wants to speak. If you are all on the phone, call on people when there is a question or topic you want everyone to weigh in on.

Another common meeting scenario is when a group of people are in a room together and others are at individual locations and join by a conference line using the speaker function. The sound quality often makes it difficult for those calling in to follow the meeting and to track the conversation. The members together in a room typically dominate. If you are facilitating this meeting, do the following:

- Make sure you hear from everyone in the introductions.
- Pause periodically to summarize and let people know where you are in the agenda.
- Remind the group in the room to speak one at a time.
- Call on individuals so that everyone has an opportunity to speak.
- Follow-up with those on the phone to see if they missed anything.

Planning and Designing a Good Meeting

Good structure and leadership are essential ingredients for any successful meeting. It often takes twice (or more) as long to plan a good meeting than it takes to hold it.

PLANNING

- ❑ Have a clearly stated goals for the meeting.
- ❑ Make sure the right people are invited: Who has information that will support good decision-making and who has the authority to make decisions?
- ❑ Gather the information needed to give those attending the meeting appropriate background reading.
- ❑ Sequence activities in the agenda that takes into account the following:
    - ♦ Information flow from information, to interpretation to action or decision
    - ♦ Techniques for creating good group thinking and decision-making
    - ♦ Adequate time is allotted for each activity
    - ♦ Some people do their thinking while speaking and others need time to think and/or write
- ❑ Send out the agenda and appropriate information ahead of time. And then send it again. If needed, include the call-in number or video link at the top of the agenda.
- ❑ Be clear about whether agenda items are reports, for discussion and input, or a decision is needed.
- ❑ Coordinate logistics to ensure good meeting space for the number of people attending, easy access and refreshments.

PHYSICAL LAYOUT: ROOM SET-UP

- ❑ Enough comfortable seating for everyone.
- ❑ Good lighting, including natural light if possible.
- ❑ Good sight line for everyone if you are projecting something on a screen, using an easel and flipchart or video conferencing.

THE MEETING

- ❑ Start on time and welcome everyone with a positive statement ("This is an important meeting so thank you all for being here…." "I'm really excited to get started because…").
- ❑ Attend to logistics (materials they should have, anticipated length, etc.).
- ❑ Include enough time for introductions, especially if there are new people at the meeting. In addition to names and organizational affiliation, ask a question about the person or his/her organization that will help people get to know each other better and get every voice in the room.
- ❑ Be clear about roles (facilitator, time keeper, etc.) and the decision-making process.
- ❑ Establish or review ground rules that will support a successful meeting.

END OF MEETING

- ❑ Review what was accomplished and any decision or next steps (including who is responsible and by when).
- ❑ Establish the time and location of the next meeting if there is one.
- ❑ Evaluate the meeting: Ask everyone one what worked well for them and one thing that would make it better for them.
- ❑ End on time!

FOLLOW UP

- ❑ Meeting notes sent to everyone who participated within two weeks.
- ❑ Create a system for accountability so that reminders are sent about action items.

Beyond the Paycheck

Increasing Employee Happiness with Innovative Benefits

by Stephen Twelker
River Network
www.rivernetwork.org

We've all read about companies that offer perqs and benefits such as onsite gyms, games like ping pong and foosball, laundry and dry cleaning facilities, subsidized massage and day care. While most of us would love to offer such services to our staff, nonprofits usually don't have such resources at our disposal. Although those of us in nonprofits need to spend our limited resources wisely and ethically, we can still adopt a generous, employee-centric attitude when considering what benefits to offer.

All employers are legally required to offer certain "background" benefits. Your employer withholds Social Security taxes from your paycheck, one less tax for you to calculate. Workers compensation and disability insurance cover medical bills and lost income, in case of workplace and non-workplace injury, respectively.

While most employers also offer some form of "traditional" benefits such as health and dental insurance and a retirement savings program, the definition of "traditional" benefits seems to change every day. A change in the federal tax code in 1978 replaced pensions with the primarily employee-funded 401(k). The Affordable Care Act of 2008 created sweeping changes to the health insurance industry; many Americans are still negotiating the new map. Dental insurance remains a relatively unregulated wilderness. The future shape of these traditional benefits remains to be seen.

Get Creative

Employers are not limited to traditional and required benefits. Consider the advantage of offering an Employee Assistance Program (EAP) for just a few dollars per employee per month. EAPs provide financial counseling, legal services, mediation, manager training, will preparation, confidential counseling and crisis assistance. Employees can discuss issues that may affect workplace performance with trained counselors, and supervisors can receive management training at low cost to the organization.

Other low-cost perqs can make a tangible, positive impact on staff morale. Buy healthy snacks for the break room. Provide exercise equipment or yoga space. Make or purchase standing workstations. Collaborate with laptops at a communal table. Let someone lead weekly Tai Chi. Bring in a masseuse for a special occasion; if you live near a natural-health school, you can 'help' trained (and supervised) students obtain their required practitioner hours. And, assuming you are not breaking any contractual agreements or causing unnecessary allergy attacks, allowing well-trained dogs in the office can do wonders for morale.

At River Network, we have played board and card games, competed in a cornhole tournament and participated in a city-wide bike commute challenge. One of the most enduring and morale-building benefits in our office is a weekly potluck lunch prepared on a rotating basis by staff. We all save a few dollars, show off our cooking skills, and commune as friends.

Keep in mind that nonprofits may have access to perqs unavailable to others. Landlords can provide access to conference rooms in other owned buildings and offered free furniture or office supplies offloaded by downsizing tenants. And companies often have a nonprofit rate. You just need to remember to ask (and if there is one thing we are trained in, it is asking).

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One of the most powerful benefits businesses can provide to employees is flexible scheduling. Once considered sloppy and unmanageable, more organizations now allow some flexibility to their staff. These arrangements acknowledge that an individual's peak performance may occur outside of standard work hours, that the primary worksite is not always the optimal place to work, and that reducing weekly commuting time may increase overall productivity. Therefore, by providing ample time and opportunity to nurture a balanced lifestyle, serve on boards and committees, volunteer, quilt or take oboe lessons, the organization fosters an improved quality of life, which feeds right back into the workplace.

Get Flexible

Flexible work arrangements need to be well-defined and responsibly managed. Employees should understand their responsibilities as teleworkers and the limitations that are placed upon the flexible work arrangement. Is there a period every work day in which employees are expected to be responsive whether or not they are at the primary worksite? Will office morale be damaged if too many people are away from the primary worksite at once? Are there key meetings and events at which all staff members are expected to be present?

Being able to offer top-tier benefits doesn't necessarily mean you'll retain your talent. Google is famous for its benefits, yet the average tenure there is 1.1 years, far below the national rate of 4.4 years. So what is the purpose of benefits and perqs? What are employers trying to do? It boils down to this:

Employee happiness has a direct, positive correlation to workplace productivity, mission identification and retention.

That's the HR-speak version. Put another way, happy employees produce better work faster, stick around longer and are more inclined to identify with the work and mission of the organization. A growing body of research supports this theory. You can't make everyone happy, but you can make your best effort to cultivate happiness at the workplace. A snack, smile or compliment can make a huge difference.

EMAIL ETIQUETTE #5

Your tone can't be heard in an email.

Have you ever attempted sarcasm in an email, and the recipient took it the wrong way? Email communication can't convey the nuances of verbal communication. In an attempt to infer tone of voice, some use emoticons, but use them sparingly so that you don't appear unprofessional. Also, don't assume that using a smiley will diffuse a difficult message. And remember: When there is a misunderstanding by email, don't hesitate to pick up the telephone to work things out!

BOARDS

by Paco Ollervides
River Network
www.rivernetwork.org

Organizational effectiveness and efficient Boards go hand in hand. The success of your campaigns, the sustainability of your organization, and the efficacy of your programs all hinge on a strategic and deliberate team approach. There should be written and unwritten rules that all members of your team support and follow. Yet, getting everyone on the same page is not always easy. Because planning is half the battle, the best way to ensure new board members, volunteers, and staff are all fully engaged is through proper orientation, constant follow up and evaluation. Also, recognition where it is due does not hurt.

During Board member and new employee orientation, each member's role and responsibilities should be spelled out. By setting expectations and providing role clarity to your team members, you maximize both the efficiency of the support you are receiving from that individual, and give them personal and professional satisfaction by setting them up for success. Most nonprofit team members join an organization because they believe in its mission. Putting these individuals on the right track from the beginning will help them continue to feel satisfied that their investment of time and resources are contributing to a worthwhile cause, whatever it may be. The vast majority of conflicts originate from misunderstandings of organizational expectations; proper job or committee descriptions are critical. This stage can be referred to under the cliché of "putting all cards on the table".

Once roles are collectively defined, your team can work on identifying priorities and determining strategies for every aspect of your organization. Remember that the competition is highly organized and the only way we will succeed is by being even more methodic in our approach. By practicing these unwritten tips, you and your team will be on solid ground to launch your everyday activities, find allies and supporters, and ensure the process is fun just as much as it is serious and disciplined. Best of luck!

VOICES FROM THE FIELD

One way to become more efficient and effective is knowing when to ask others for input and advice. And that's exactly what we did. Below, organizations from across the country share the tools and strategies they employ to create a healthy, communicative and functioning workplace.

We use a wonderful tool to organize, store and share documents with staff and Board members. It is a wiki from PBworks.com; a free password-protected internal website. Documents on the wiki include board meeting agendas, minutes, and handouts, financial statements, presentations, and board handbook documents. Board members also track volunteer efforts and hours on the wiki. It is such a relief for Board members not to have to file and find these documents on their own computers or within email; they always know they can find what they need on the wiki.

Tippecanoe Watershed Foundation (IN)
www.tippecanoewatershed.org

We intentionally have reduced the amount of unnecessary emails between staff. Now, if a message comes from staff, we know it is important. We don't have set policies or guidelines about reply to all, cc, bcc, but I use the policy with my staff of, if you are mad at an email or feel emotional about it, start a new email, crank out all your feelings, and say whatever you want, but don't hit send. Save it as a draft. Come back in an hour or two and look at it again. Revise and edit and get rid of everything negative and use only a positive tone. Eventually you will craft an email that works. If necessary, send it to someone else for review. Basically use common–and professional—sense.

In terms of special benefits, we call it a paycheck. Seriously, we strive to be very flexible in our work hours. Many of us are night-owls and send emails at 2 am. Others are strictly morning and 9-5 types. It works well. We employ a philosophy of flexibility.

We also have an amazing board that understands its role and stays out of the way yet ask what they can do to help. Nothing worse than a board member that just come to meetings to hear themselves talk or one that emails staff constantly with bullshit questions that they should already know (is that too harsh) We have board orientation when we get new members and staff; this sets the tone for what we need and how the organization runs, etc.

Dan River Basin Association (NC/VA)
www.danriver.org

The single most crucial tool for the Water Words That Work team's productivity is Google Apps. Once you get the hang of shared calendars and "cloud" documents, you'll never go back to paper calendars and email attachments.

Water Words That Work
www.waterwordsthatwork.com

At Utah Rivers Council, our philosophy is one of generosity and hard work, mixed with the management theory of Love 'Em or Lose 'Em, as epitomized in a few management books. We work hard to create a very tight, social network in the office and in our board. We treat our employees as best as we can, with days off for skiing/boating /recreation that can be planned or impromptu. Our vacation policy is generous and we are happy when our employees hit the road to recreate or spend time with family. We provide about 3 weeks of vacations in the first year of employment. We also refuse to let our employees work while they are sick. (They get in trouble if they arrive at the office sick.)

We also give significant staff gifts as we can find them. As recognition of hard work we gave one employee new to our state a brand new package of skis, boots, bindings that we got on pro deal. We do that as frequently as we can. And, we buy lunches and treats when we can. Such gifts help create loyalty and recognize hard work.

We go on staff retreats—skiing or boating—in which no work is performed. I should say, important work is performed: staff relationships are deepened and fun is had. People bring that back to the office and its commercial value is hard to appraise.

I put people into intense situations with an immense amount of responsibility, and they love it. I rely upon my employees for their input and judgment and they tell us in reviews that one of the things they really like about this job is that they know their opinions really matter to the organization.

Most importantly, we make our employees think about their '5 year plan' and we try to keep them expanding their perspective and skill set based on their long term plan. We push them to set high benchmarks for themselves professionally, regardless of whether it's in our immediate interest as an organization. We have written forms and exercises which we implement on their first day of work and are revisited annually alongside quarterly discussions about professional progress. We pay for trainings to expand their skill set, if necessary as well.

These strategies only work, however, if you are starting with an employee with a good attitude who wants to be here. If someone doesn't really fit with this model, it doesn't work. Although some people make a big deal about job skills, in truth, we believe that skills can be learned. But attitudes are choices that only employees can implement. So if someone wants to work for us that doesn't have a good attitude, we won't hire them. But someone willing to learn and grow with a good attitude can become indispensable to our organization. And, we try to recruit people with shared values systems. It's not an exact science, but shared values systems allows people to feel a stronger sense of shared teamwork.

Our staff works hard and it makes up for the lack of pay compared to the for-profit world. My employees could easily double their salaries in the for-profit realm, because they are so effective and capable. So making this job fun—keeping them happy—is the key. Maybe this model won't work for everyone, but it certainly is working for us.

Utah Rivers Council (UT)
www.utahrivers.org

EMAIL ETIQUETTE #6

Re-read your email before you send it.

Try to do this with every single message. Fingers have difficulty keeping up with brains. It's not unusual for us to drop a word or two when racing to transcribe a thought. Therefore, it's a good idea to re-read your message and make sure that you are communicating clearly and observing good email etiquette. You should also review the "to" list and ensure you have not mistakenly included the wrong recipient.

VOICES FROM THE FIELD

VOICES FROM THE FIELD

Invest in Technology. Prescott Creeks has dedicated large amounts of money to our network server, website, workstations, and software, and this has led to our overall efficiency and effectiveness. There is no chasing a thumb-drive (floppy disk) around the office anymore. Everyone has access to the documents they need, when they need them, and we can all access each other's calendars and contact lists. This focus on technology has also allowed is to dramatically reduce our printing and paper use—which helps us walk our talk a bit more. New staff consistently seem to be impressed—possibly expecting an nonprofit to have 1990's technology.

We also use WaterGrass. No River Network Partner has a good excuse for not utilizing this database. While the learning curve has been challenging, the utility—and support—is unparalleled. And, a jar, or bowl, of candy strategically placed in the office, also seems to do wonders for morale.

Prescott Creeks (AZ)
www.PrescottCreeks.org

Staff is our lifeline and we work to keep everyone motivated by hosting staff lunches/dinners/bagels and a holiday party. We also offer flex time and three day weekends. The flex time is extremely popular as people can balance home life and work. We are very generous with flex time and it is on the honor system. With a small office it is easy to track and nobody takes advantage. We also have a generous vacation package for full time employees and we are closed between Christmas and New Year (paid for full-time employees). We also offer 11 paid holidays (9 plus 2 floating). We have some paid sick and paid vacation for one part time person.

Clinton River Watershed Council (MI)
www.crwc.org

We are a small staff, but we do try to have weekly staff meetings. We also try to schedule at least one "crew retreat" where we camp out & just have fun, and participate in boat training on the river (similar to a float trip, only we often times have motor boats involved). Food and beverages are often involved when we have volunteer meetings, and work weekends. At the end of the year (it technically ends up being in January, after the holidays) we have a crew awards banquet and present fun awards to our volunteers. Remembering to celebrate our accomplishments is key.

Missouri River Relief (MO)
www.riverrelief.org

EMAIL ETIQUETTE #7

Don't send or forward emails containing libelous, defamatory, offensive, racist or obscene remarks.

If you do so, you can put yourself or your organization at risk. You could be sued for simply passing something along, even if you aren't the original author.

The Doodle scheduler is great! We use it all the time, for both meetings and volunteer activities.

Doodle

Streamkeepers of Clallam County (WA)
www.clallam.net/streamkeepers

EMAIL ETIQUETTE #8

Remember that email isn't private.

People have been fired for using email inappropriately. Email is considered property of your organization and can be retrieved, examined, and used in a court of law. Unless you are using an encryption device (hardware or software), you should assume that email over the internet is not secure. Never put in an email message anything that you wouldn't put on a postcard. Remember that email can be forwarded, so unintended audiences may see what you've written. You might also inadvertently send something to the wrong party, so always keep the content professional to avoid embarrassment.

Lync

One tool that I'd like to highlight in these days of remote offices is the role of services like Lync (I know that there are others) that allow for "officing," instant messaging, instant video calls, etc. I've been very impressed at how dispersed organizations can use this to maintain a very tight working relationship even though their staff are all over the globe.

The Johnson Foundation at Wingspread (WI)
www.johnsonfdn.org

A few years back, we all switched to Google Calendars for work. Now, we all put our calendars on one shared calendar at Gmail, and our iPhone calendars can synch there (magically) and directly. You can even set up the iPhone calendar to display other people's calendars. Another tool is CalenMob, an app which downloads our entire staff calendar onto my smart phone. That's been great for tracking people down and keeping up on daily events. All of our recurring staff meetings and Board meetings are added to the calendar.

We have also started revising our "*Riverkeeper News*" biweekly emails, newsletter articles, and other projects where a few staff contribute to "google docs" to make things more efficient instead of just emailing versions back and forth to each other. That has been helpful and has increased the time it takes to get out membership communications.

We do need to do a lot more for burnout prevention and staff benefits. We try to have a staff retreat every year, in part to work on our annual work plans and to visit a different part of our watershed. Normally there is a visit to a winery, brewery or a cheese-making establishment and a superfund site. What more could someone ask for? We do realize that most of our events all have a free local beer component, and that always helps. We are Milwaukeeans, so beer is an important part of our culture.

Milwaukee Riverkeeper (WI)
www.mkeriverkeeper.org

VOICES FROM THE FIELD

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CASE STUDY

The Meridian Institute: Building Community in a Distributed Organization

by Molly Mayo
Meridian Institute
www.merid.org

Many of us work hard to balance our personal needs with a professional commitment. Over time, our personal situations change and in some cases they can conflict with our work. In the past, moving beyond a reasonable commuting distance from the office typically meant a job-change. But today, our society is more mobile than in the past and organizations of all sizes are trying innovative ways of keeping up with the times. As a result, the look and feel of the modern workplace is changing and distributed teams are becoming more commonplace. Many tools exist to increase efficiency and productivity in a remote or mobile work environment, allowing for great gains in flexibility. But how can we ensure effective internal communications and create a collegial work environment when staff do not share the same office? Many organizations are turning to virtual tools to help. Based on my experience, technology and tools are critical but not sufficient.

About eight years ago, I said goodbye to the Colorado office of our small nonprofit and headed north to set up a remote office in Alaska. I departed with a healthy dose of skepticism about whether a home office would work for me. I enjoyed the friendly atmosphere that comes from working daily along-side 10 colleagues. We often conducted team meetings over lunch, hollered to the office next-door when help was needed and generally took advantage of opportunity for spontaneous connections. Meridian Institute has grown to over 50 people and many of my colleagues have relocated from our original bases in Colorado and Washington D.C. Now, about a quarter of our team is located in home offices around the country and Canada. We navigated the transition to a more distributed team cautiously and it is now integral to our organizational structure. Based on our experience, the attributes of a healthy distributed work environment fall into two general categories: culture and tools.

Culture

The culture of an organization provides the foundation for working together effectively, even when you are not in the same office. We start from a place of respect. We work hard and expect others to as well. Fostering the "we're all in it together" feeling is fundamental to making a team work well virtually, just as it is when you are in an office together. Without the physical evidence that you are all willing to do whatever it takes to get things done, remote staff have to take responsibility for making sure that attitude is communicated clearly. When it is not, there is no technology that can make up for it. Additionally, we have a few important lessons about the limits of a virtual community.

The communication hierarchy: Technology cannot improve upon personal touch when it comes to clear communications. While it may not always be practical, it is important to remember the secondary benefits of walking down the hall or picking up the phone despite all the cool new gadgets. A good rule of thumb is: If you can, always chose to meet with someone face-to-face. If you cannot meet, then pick up the phone, if you cannot pick up the phone, then write…

Make time together a priority: There is no substitution for working side by side when it comes to developing strong working relationships. All remote-office staff are encouraged to take advantage of opportunities to spend time with colleagues in our two main offices. We have “hoteling” space for staff traveling so that they can be productive while spending time in the office with colleagues.

Certain things are best done in-person: Periodically, staff need to get together in person for retreats, strategy sessions or other group activities to remind each other that these are real people on the other end of phone line. Plus, some activities are best done in person, such as performance reviews, disciplinary actions or communicating a change in employment status.

Tools

A plethora of tools for workplace collaboration exist, many of them are free. Our goal with all the tools we apply is to strengthen the connectivity and effectiveness of our staff. I’ll share some examples that have become the most used and useful for our team. In almost all cases, the more people use a tool, the more valuable it becomes. So, choosing those that fit the style of your team is just as important as the bells and whistles it offers.

Instant Messaging: The primary function of instant messaging is quick, bilateral communication about a simple or time-sensitive issue. The secondary benefit, and perhaps most important for our team, is the ability to create the virtual sense of an office. Most instant messaging tools display who is online and “in the office” at any time. When you are at your computer, it projects a name or image indicating that you have shown up for work and can easily be reached, even from 1,000 miles away.

Shared calendars such as Outlook allow colleagues to check someone’s schedule and availability at any given time. They allow for co-planning team events and calls, particularly when an individual is unavailable.

Many collaborative work spaces and web-based tools for document sharing exist. We use SharePoint, a password-protected, on-line intranet for document sharing, contact tracking, collaborative editing tools and long-term knowledge sharing within the organization. Project collaboration portals are also used as password-protected spaces for project teams to organize and share information with participants, in a secure environment.

OneNote is a digital notebook that provides staff a common place to organize multi-media notes and information and work together more effectively.

Yammer is a free social networking software that provides a simple way for employees within an organization to connect and share informally by posting messages. It has a multitude of uses but we have historically applied it as a “community building tool” by encourage staff to post succinct, non-time-critical comments that may be of interest across the staff.

Audio/video conferencing and webinars are used for monthly staff calls and team calls.

I’ll admit that I miss the camaraderie of working in our Colorado office. But I’m fortunate for the new community I’ve joined and the balance between meaningful work and a healthy home with my husband. At Meridian, we have found ways to evolve with the needs of individuals, which in turn has come to benefit the whole of the organization. By all accounts, we have grown stronger for it.

Molly is a Partner at Meridian. She joined Meridian in 2000 and now lives in the home she built with her husband outside Talkeetna, Alaska.

Resources & References

The Happiness Choice: The Five Decisions That Will Take You from Where You Are to Where You Want to Be, by Marilyn Tam, provides ways to implement tools and support to enhance their organization's well-being. The book guides readers in prioritizing their many roles so that they can feel fulfilled and balanced. Readers will learn that it is not only *how much* they get done but also *what* they get done. WILEY; Hardcover, ebook and audiobook available from wherever books are sold.

Nonprofit Employment Trends SurveyTM. The nonprofit sector is an often overlooked and important economic driver with its 10.7 million employees making up just over 10% of the nation's private workforce. The survey is intended to provide a snapshot of current employment practices and discuss the economic trends and implications of employment practices in the nonprofit sector. **www.nonprofithr.com/wp-content/uploads/2013/03/2013-Employment-Trends-Survey-Report.pdf**

EMAIL ETIQUETTE #9

Minimize the use of the "high priority flag".

Most email programs allow you to set the priority of the message. "High priority" should be reserved for messages that are truly urgent. If you use it for every message, you will simply be ignored. It's like the boy who cried "wolf" one too many times.

The Nonprofit's Guide to Human Resources: Managing your Employees & Volunteers. Jan Masaoka, Chief Executive Officer for the California Association of Nonprofits, walks you through the ins and outs of common HR circumstances found in nonprofit organizations. Avoid legal issues and learn how to manage your staff effectively with The Nonprofit's Guide to Human Resources. October 2011, 1st Edition. $49.99.

Project Management Tools That Nonprofits Should Know About, an article by Idealware, describes a number of applications that can help with project-related tasks. **http://idealware.org/blog/project-management-tools-nonprofits-should-know-about**

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When Work Works is a nationwide initiative to bring research on workplace effectiveness and flexibility into community and business practice. It is a project of Families and Work Institute and the Society for Human Resource Management. **www.whenworkworks.org**

River Network offers a free online assessment tool that gathers data about your organization's programs and internal structures. This diagnostic tool is divided into two sections: Status Report and Internal Assessment. ***The Status Report*** deals with quantitative data about the organization's programs and organizational structures. ***The Internal Assessment*** is designed to assess from the point of view of multiple people within the organization—board, staff, volunteers and others—the strengths and weaknesses of the organization. River Network saves all data for future updating and progress comparisons, as well as trends within the river/watershed conservation community. **www.rivernetwork.org/status-report-survey**

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Partnership Staff

Dawn DiFuria
Partnership Program Manager
ddifuria@rivernetwork.org
541-276-1083

Cara Meyer
Education & Partnership Program Associate
cmeyer@rivernetwork.org
503-542-8395

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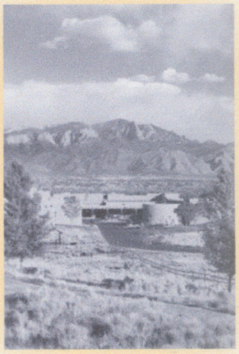

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