



## Marta Brockmeyer, Ph.D. Project Pointers

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### POISED FOR PARTNERSHIP



I thoroughly enjoy and learn from an exceptional group of independent consultants. I also refer these fine professionals to colleagues, who rave about the value they have received. While these colleagues apply their expertise to projects I'm leading, their scope is understandably limited in terms of the overall process. The last few years have brought heavy merger and other partnership commitments, and I often wished for someone to help with the responsibilities (and workload) that are uniquely mine. I hoped the right person would appear at the right time...and, she has.

Rhonda Moore will be working beside me on several projects in the new year. Many of you know Rhonda, the former Executive Director of Pro Seniors. In addition to her legal background, wide network, nonprofit experience and excellent reputation, she brings a calming, supporting personality for the work. Her contributions will provide more options for clients and expand the practice's capacity for additional projects. The future is bright.

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### TURNING POINT



#### Holiday Stress? Try these tips next year!

I have written before about holiday stress because December is such a challenge for anyone working in human services. To help with my own stress, I decided a couple of years ago to apply fundamental project management principles to better enjoy November and December, and the benefits have paid off. I'm happy to share some of what I've learned.

**Define the scope.** First, what exactly is your big picture goal for the holidays? You may have several wishes, but try to craft one phrase as the umbrella for your hopes. If your desire is to relax and refresh for the new year, managing time and resources should reflect this. As a result, you might limit social events or delay any house projects. Once you have your succinct umbrella statement, break the work down into pieces. This will keep you organized as well as reduce the crippling feeling of being overwhelmed. In most cases, you will develop the scope with others, so expectations are clear for all.

**Document.** Start a notebook or electronic document that captures your holiday thoughts and tasks in one place. I refer to these notes regularly, saving lots of time and headaches. I record notes about gifts, the preferences of friends, and reminders to not repeat something that did not turn out well. I also jot down notes about which colleagues dislike the season, so I do not burden them with more cheer than they want.

**Maintain a schedule.** If you want your holiday planning to conclude by a certain date, write down that date and work backwards. To complete all tasks by December 15, when do you need to begin each task? I drop these start dates into my calendar because task completion dates without start dates aren't necessarily productive. It also helps to think about potential delays and how to best manage them. For example, if you make an online purchase and then learn the item is back ordered, how long can you comfortably wait before moving to Plan B?

**Track the budget.** You probably have in mind an amount you will spend and hope to stick with that, or you may add up expenses at the end and review the implications for the new year's budget. The notes you keep each year can be very helpful in maintaining a realistic sense of what it costs to meet your scope and "produce" the season you want. For close friends and family members, you may want to set gift limits or decide to stop exchanging gifts. Entertaining costs can also quickly escalate, so don't hesitate to ask others to bring food or contribute in other ways. By creating a system to track expenses and stay within your budget, you can jump-start the new year.

**Embrace the role.** In your project manager role, your focus should be the big picture as you lead others to fulfill the scope. Colleagues or family members may serve as your project team and it is good to remember their input is essential. Collaboration may seem too time consuming when you are tired or rushed, but it will save the holidays. I recently experienced a neighborhood "moment" when it would have been far easier to just do something myself, but I knew others would not be happy - even if it was "just" an outdoor decorating discussion.

**Manage the interconnected.** It is tempting to think of scope, budget and time as independent, isolated issues, but they greatly influence each other. Project management allows you to address the interrelated nature of these three constraints and brings more stability when changes occur. Part of this is managing the interplay of personal and professional demands. I have found it helpful to combine professional and personal "to do" lists in December because they are so connected, and it is easy to underestimate how much time or money something requires. This approach has been calming and effective.

**Shop all year.** Enough said.

**Enjoy the freedom.** If this all seems too hopelessly structured to be any fun, the opposite can be true. I'm finding that the planning releases more space for spontaneity, healthier choices and the security of knowing I have indeed focused on what's important. I'm then more available to help others and respond to the unexpected. Implementing the project management approach might be a good new year's resolution to reduce stress and enjoy future holidays.

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## VIEWPOINT: IN MY EXPERIENCE



I receive a variety of questions, both formal and casual. Some are asked over a Saturday night dinner with friends, others come from colleagues and clients. The two most common questions follow:

**Are there really that many nonprofit mergers?** This frequent question usually comes from those who are unfamiliar with the sector and who genuinely want to learn, but this is not always the case. The question occasionally rests on a bed of condescension that implies human services organizations are not sophisticated enough to apply standard business tools for efficiency and sustainability. It is even more concerning when someone in the nonprofit sector asks the question because it signals a possible communication failure. Staff members should be regularly updated on current trends and the organization's strategic goals and implementation. Of course, my response depends on the context and who asked, and I try to not seem too surprised when I answer.

**When are you going to retire?** Simply, when it stops being fun or I feel I'm not helping the community. Retiring from a consulting practice is different from retiring from a traditional position and is more a matter of reducing commitments vs. setting a hard stop. In any case, this translates into working on projects about which I am passionate and that are likely to impact clients in significant ways.

Additional questions? Please send them along and I'll give you a call or respond in the next newsletter.

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POINTING TO A GOOD READ



For relief from the cold, grab a cozy afghan and [click here](#).

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## End Point

I am ending the year with confidence, excitement and a sense of peace about the future. My wish for each of you is that you share these feelings and enjoy the holidays.



Best wishes for the new year,

*Marta*



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