

In-Tray Exercise

Prioritising and Delegating

Prioritising and Delegating In Tray Exercise

This pack contains:

Trainer's Instructions

10 'In-Tray' documents

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In Tray Exercise

Prioritising and Delegating

Instructions

You are the manager of a community project which employs five paid staff, three full-time and two part-time, working on a variety of development roles, plus a part-time administrative assistant. A rota of ten volunteers work alongside the staff on a range of supervised activities; in particular, answering the telephone and staffing the reception desk.

It is Tuesday, 2 November and the time is 10.00 am. You are later than usual arriving at work because you have called in on a colleague on your way in, to pick up some information and he kept you talking.

The attached documents are on your desk when you arrive.

How will you manage what has to be done, and in what order?

You have 15 minutes to read through the documents, make your decisions about the priority of the situation involved, and to put the documents in the order in which you will tackle them.

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In Tray Exercise

Telephone message

Time 9.10 am

Date: 2 November

Fred rang this morning. Not too well. Sorry, can't cover reception desk this afternoon. Aware this will leave you with a problem of no cover and will, no doubt, cause difficulties. Very sorry. Suggests could Penny do it instead. Her telephone no. is 234076

Pat

In Tray Exercise

**Midshires Health Trust
Customer Development Unit
Midway Road
Midway
Middleshire**

1 November

Proposed Interpreter Service Working Party

We are in the process of looking into the need for an extended interpreter service with our regional Health Trust facilities. We are currently forming a working party to focus on this.

It is our intention that this working party should have as wide a membership as possible, with representation from the regional and local Health Service departments; from local authority Social Services and Education departments, and from selected local voluntary organisations.

In this latter respect, I am writing to you now, to invite you (or your representative) into the membership of this working party. The date set for the first meeting has been fixed for Tuesday, 30 November. Initial documentation for your information to follow. If you are interested in becoming involved in this important new development, please contact Pamela Smith, in the Customer Service Department at the above address, with the name of your representative, by 16 November.

I would draw to your attention that it is intended that this working party will take on a substantial amount of the practical work involved in this new project. Potential members, and their employers, should, therefore, be aware there is some time commitment required, as set out in the Establishing Document, PS/Dev.Int/6F as previously sent.

I do hope that you will feel able to join this working party, as your considerable experience of voluntary sector procedures and networks would be indispensable to this project. Hope to see you on day.

Sincerely

K. Duncan

K Duncan
Senior Customer Development Officer

In Tray Exercise

Note from volunteer:

Have a friend who wants to make an appointment to see you, because she would like to help as a volunteer.

*Her name is: Vivienne Turner
23 Short Lane
Tel. 236271*

Margaret

In Tray Exercise

1 November

Thanks for notice of my appraisal session - 9.30 am on 3 November.

However, you omitted to tell me where we are to meet. Please could you get back to me. Thank.

Anwar

In Tray Exercise

1 November - 4.30 pm

Message from your admin assistant:

SORRY

Photocopier jammed when I was using it. I haven't been able to contact photocopier repairs, so I'm afraid staff meeting agenda has not been photocopied or minutes to go out to Community Workers' Forum on December 1.

Pat

In Tray Exercise

Telephone message:

1 November

Treasurer rang. Will come in at 11 o'clock, Tuesday, 2 November to discuss new budget. She hopes this is O.K. Ring her back if you need to change it.

Pat

In Tray Exercise

Tuesday 2 November - 9.05 am

Message from colleague

With regards to our staff meeting at 10.30 am today. I would like to raise an issue under 'any other business' on a very important issue that has just come to notice. I really need to discuss it with you first.

Sangita

In Tray Exercise

Memorandum

From: Maureen Hislop

Date: 1 November - 5.30 pm

Stationery order arrived at 4.45 pm today.

I started to check it in, but couldn't cope with it all. Did we really want 100 boxes of envelopes? Have stacked it all outside the stationery cupboard, as no room inside. It is blocking the corridor a bit. I'm sorry, but didn't know where else to put it. (John is visiting tomorrow - in his wheelchair!)

Please could you deal with all this, as I'm not in again till Thursday, remember.

Thanks.

Mo

In Tray Exercise

Midshire County Council
Social Services Department
Shire House
Town Hall Square
Midway
Middleshire

Tel: Midway 12345

29 October

Dear Colleague

Financial Conditions

You will now have received a copy of the handbook 'In Partnership' which clarifies the relationship between voluntary organisations and the County Council.

Also enclosed with the handbook is a document headed 'Financing' which outlines the conditions applicable to all funded voluntary organisations in receipt of a Service Agreement.

If there are any aspects of the conditions which require clarification, please do not hesitate to contact me. Otherwise, I would be grateful if you could confirm your Management Committee's acceptance of these conditions by completing and returning the slip at the bottom of this letter before 8 November, at the latest.

I am aware the timing of this is very close, but it is important that we have your acceptance of these conditions at the earliest opportunity.

Thank you for your co-operation.

Yours sincerely

B Brown

B Brown
Senior Voluntary Sector Officer
Midshire SSD

Financial Conditions

The Management Committee Members have read and understood the terms contained within the financial conditions and agree to abide by them.

Signed:

Name:

Date:

Position:

Organisation:

The 4 Quadrants

	urgent	not urgent
important	① Crisis Problems Deadlines Fire fighting	② Planning Building relationships in & outside the organisation Prevention of crisis Looking for new opportunities / developments Personal time to refresh & renew
not important	③ Interruptions Some meetings Some post Some reports Dealing with 'small' tasks	④ Being busy! Things we like to do but don't have to do

Most people can divide their working day or week into something that resembles the 4 Quadrants, as show above. How much time you spend in each quadrant has consequences for yourself and your organisation.

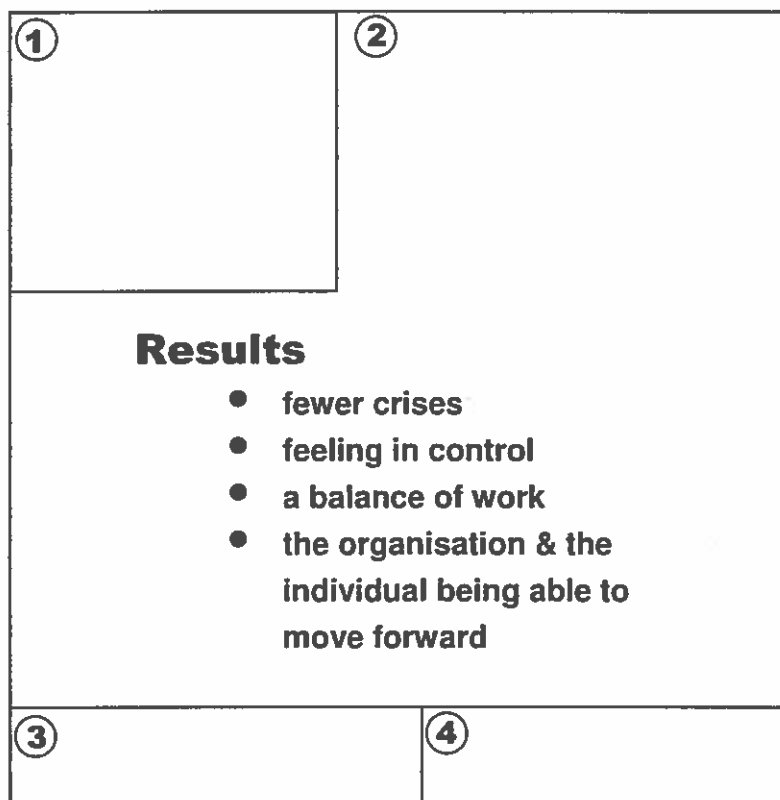
Spending too much or most of your time in **Quadrant 1 (urgent & important)**, dealing with crisis, fire fighting as problems crop up, and trying to meet tight deadlines is dangerous to both staff morale and an individual's own health.

Quadrant 3 (urgent & not important) is where individuals often spend a lot of time, because being in Quadrant 3 can give a feeling of getting work done. However, this quadrant is about dealing with the small jobs of a 'to do' list in order to clear the desk for the 'important' stuff, usually to find that there is no time left in the day to do the important stuff.

Quadrant 4 (not urgent & not important) is just about being busy, filling the day. This is about individuals who work all day but don't seem to actually achieve anything. It is also about spending time helping others (when there is no need to) or getting involved in tasks that are no longer yours; maybe the ones you used to do that fall into your comfort zone.

Quadrant 2 (not urgent & important) is where anyone working successfully will be spending the majority of their time, especially managers, but it does apply to all staff. This is where the long, medium or short term planning is done, where new opportunities for the organisation are sought out and importantly where activities that renew or refresh you are placed. For example, a walk round the park/shops, a coffee with a friend at lunch time – anything that revitalises and energise you.

An ideal map of time should look like this. By spending more time in Quadrant 2, it should minimise the other three quadrants:



Staff & volunteers are **human** and spending a little time in Quadrants 3 and 4 is inevitable.