NonProfit Financial Managers

A Resource for the areas of Finance, IT, Human Resources, and Office/Facilities Management

For information, go to **npfm.org**, or contact Mitzi Fennel at 617-547-9861 x235 or Jessica Zander at 617-850-1752.

Mark Your Calendars

All of our meetings take place on the **last Tuesday** of each month. No pre-registration required. Upcoming dates:

♦ **February 26: Overhead Allocations**

♦ **March 25: Conducting an Operational Review**

♦ **April 29: Conflict of Interest Policies**

NPFM Membership Information

The annual membership fee of $100 covers monthly mailings and other operating expenses. The membership period is from September to August. A part-year membership for $60 is offered for those joining after January 1st, which covers membership through August. Full-time students are welcome to join at any time without paying a fee.

In addition to attendance at monthly meetings, members receive a monthly newsletter and access to the NPFM e-mail forum. Lunch is provided for all attendees at meetings. There is a $12 meeting fee for non-members, and since membership is by organization, there is no limit of individuals from any one organization who may attend the meetings.

R.S.V.P's for the meetings are not required.

For renewals or new membership fees, please make your check out to:
NonProfit Financial Managers
C/O Child Care Resource Center
130 Bishop Allen Drive
Cambridge, MA 02139

Contact Mitzi Fennel at 617-547-9861, x235 for more information.

The Next Meeting

> **Topic: Overhead Allocation**
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> **Date: Tuesday, February 26**
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> **Location: United South End Settlements 566 Columbus Ave., Boston**
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> **Time: 12:00 PM – 1:30 PM**

Have you ever wondered why overhead should be allocated to programs and if you are allocating it correctly? This is a topic with a lot of gray area so we will have a panel presenting a cross-section of experiences with different types of organizations. The presenters will cover the following topics: What costs are considered overhead? Are there costs that should never be allocated as overhead and should remain in G&A? What basis can be used to allocate overhead costs? When and how should the costs be allocated? What will auditors and funders think of this procedure? What are the basics of applying for a federal indirect rate? The panelists will include members of the NPFM steering committee.

Recap of January Meeting

Gordon Gottlieb presented on the topic "Tips for Dealing with Difficult People." Gordon is a human resource/organizational development consultant at the Technical Development Corporation, where he provides technical assistance, coaching, and training services to nonprofit organizations throughout New England. Prior to that, he worked in Human Resources for the Unitarian Universalist Service Committee and Northeastern University. The guiding principle for dealing with difficult employees is: You cannot change someone's personality, but you can attempt to alter their specific behavior and you can apply appropriate techniques to make your interactions with that person less challenging.

Gordon used a grid set up in quadrants to categorize various behavioral types of employees based on their need for interaction with others. This handout has been emailed to the group through the list serv.

The point of the quadrants is to figure where you fit in and to use it as a tool to work with others. Of the four quadrants, which are easier for you to work with and which are more challenging? The categories that generally experience the most conflict with each other are: the Data/Information group vs. the Visionaries; and the Friendlies vs. the Directives. You can further categorize yourself or another employee by identifying their primary quadrant and then their secondary quadrant.

When dealing with someone who exhibits challenging behavior in the workplace, you should first define your goal – basically, you don't want this person to display this particular behavior in this setting. You then need to decide on the approach you will take with that person. The supportive approach is often easier when dealing with the friendly types and data types. A confrontational approach may be more effective with the visionary and directive types. When working through a conflict with a visionary person, you need to show that you are not being oppositional and that you buy into their overall goals. The friendly and visionary types are often governed by emotions, while the date and directive types are more rules governed. You need to determine how important the issue is that is in conflict and frame your arguments accordingly. You may have to frame you conversation in ways that will resonate with the person you are trying to deal with. Try not to frame your feedback to that person in the negative; rather, frame it in the positive, such as "this is what we want to accomplish." The organization ultimately is responsible for defining the boundaries of acceptable behavior and for establishing the ground rules that define professionalism in your workplace.