Successful Project Management

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About the Presenter

As Training Director, Nelson Layag leads the development and programming of CompassPoint's Training and Conferences. He was formerly the Director of Technology at CompassPoint, where he lead the development of innovative technology projects for the nonprofit sector which include an online and interactive training resource for community organizers and an e-learning course for Cisco employees who are about to join a nonprofit board. He has served in a number of positions at CompassPoint, including Director of Education. Prior to joining CompassPoint, Nelson was the Accounting Operations Coordinator at Morrison & Foerster in San Francisco and Group Home Supervisor for Star House in San Jose. He was a social worker serving at risk youth in Baltimore before coming to California. Nelson has a BA in Business Administration and Marketing from Loyola College in Baltimore, MD and was one of the first student coordinators for the Center for Values and Service at Loyola, which connects student and faculty volunteers with community nonprofit organizations in Baltimore.

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Workshop Objectives

o Identify key issues/challenges/barriers for effective project management for the organization.

o Provide an introductory overview of project management concepts.

o Build upon (add to/revise/improve) current tools and processes the organization is currently using for project management.

o Develop an achievable list of clear and actionable items that staff can implement immediately (using the concepts, skills, tools that will be presented in the training).

Mantra =

Earlier & Better (not perfection)

Your Strengths & Challenges

Exercise:

Identify your personal and organizational strengths that can support strong project management.

Identify your personal and organizational challenges that can hinder project management.

Definitions

What is a Project?

- BEGINNING and an END
- Clearly defined, realizable goals
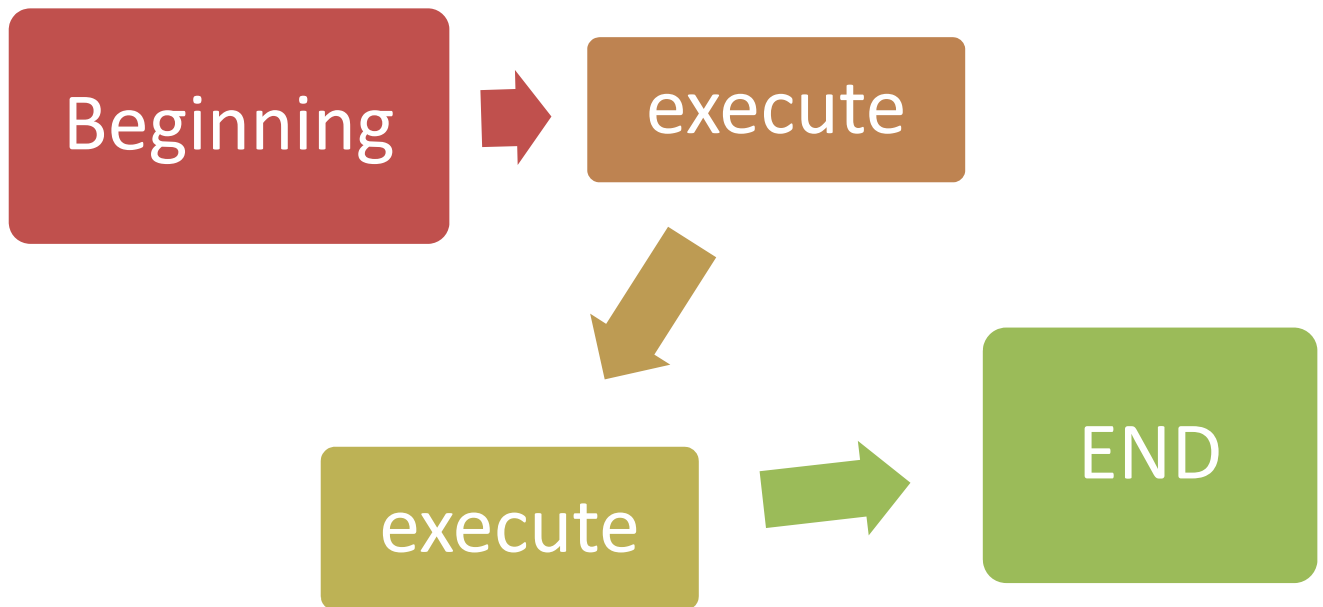
Project Manager

- ONE person
- Main job is to keep project moving forward
- Coordinates activities
- Tracks progress and budget

"On Time and On Budget"

Project Sponsor

o   Defines (or approves) goals
o   Provides(or approves), deployment and reallocation of resources
o   Approves deliverables
o   Authorizes changes in scope, timing, deliverables
o   Provides support for issues beyond the project managers scope of
    authority
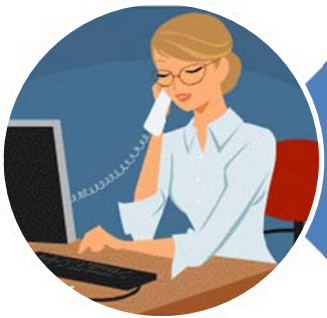
Can be a single individual.

- Internal examples: executive director; program director

- External examples: client; funder; project partner

Can be a group.

- Internal examples: management team; board of directors; committees

- External examples: steering committees; collaborative councils; partner organizations

Identifying who is the sponsor:

Who is "acting like" a sponsor?

The Five Steps of Project Management
(These are really processes and are often "overlapping" in practice).
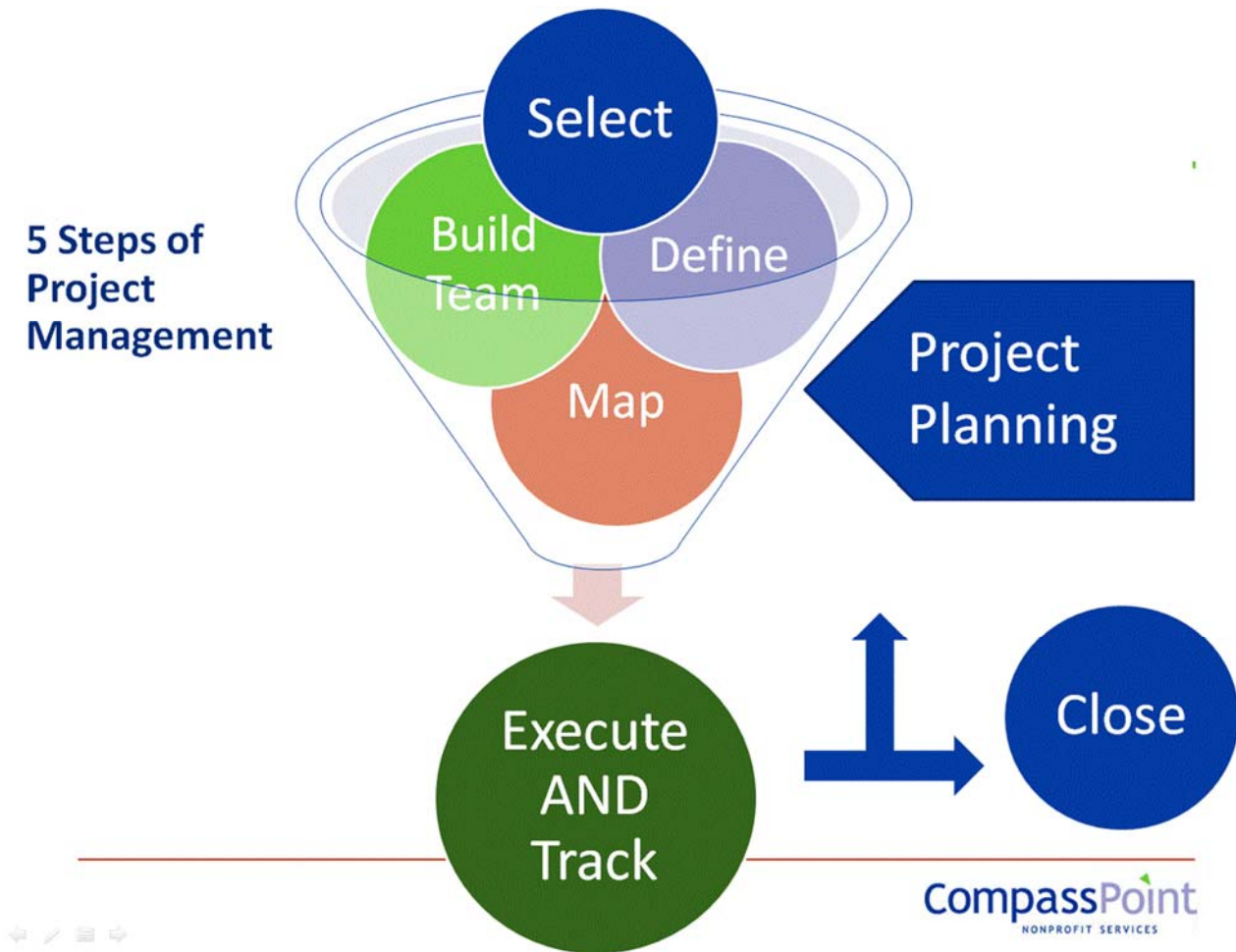
The Five Steps of Project Management

(These are really processes and are often "overlapping" in practice).

1. Select a Project
Decide if your organization is ready to do the project. Do you have the staff, money, and time to take this on? How does it fit in with the strategic vision of your organization?

2. Define the Project
Determine what all the ultimate goals of the project are, what specific deliverables your project will create, detailed task lists, if there are any set timeframes and what the budget is.

3. Build Your Team
Figure out who is going to be working with you, including identifying a sponsor, leadership that wants to give input, peers you can work with and resources (such as an advisory board).

4. Map Out the Work
   o Specific tasks you need to do
   o When they need to be done
   o How long each step will take
   o What steps are dependent on other steps
   o How much money you can spend on each part of the project

5. Track Progress
   o Record any issues that come up and make sure you follow up on them
   o Document and debrief
   o Track expenses
   o Revise the plan as needed

Step One: Select a Project
Project List
Select a Project: Determine What You Are Already Doing

Capacity Question:

- Organizational Capacity
- Team/Departmental Capacity
- Individual Capacity (your own)

Decide if your organization is ready to do the project (and/or when).

Do you have the staff, money, and time to take this on?

How does it fit in with the strategic vision of your organization?

Mapping - Calendar Format

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 **BVA:** Training Dates	2	3 *Healthy Kids:* *Finalize Brochure* *Text*	4	5 ***AOB****: Text to* *Designer*	6
7	8 **Healthy Kids**: Review Training Design & Revamp	9 ***AOB****: Proof* *Brochure* ***AOB****: Corporate* *Fundraising* *Workshop*	10 **AIA: Send Out** **Table** **Solicitations**	11 *Healthy Kids:* *Addresses to* *Mailhouse*	12 ***AOB****: Corporate* *Fundraising* *Workshop*	13
14	15 **BVA:** Schedule Trainers	16 **AIA: Follow Up** **on Table Invites**	17	18 ***AOB****: Send* *Brochures to* *Partner Agencies*	19 **AIA: Save the** **Date Cards to** **Mailhouse**	20
21	22 **Healthy Kids**: Fair Exhibition Plan	23	24 ***AOB****:* *Enter Workshop* *Registrations*	25	26	27
28	29 OUT of OFFICE	30				

Your Turn Step One: Select a Project

Even if you have already been handed a project, and can't choose whether to do it, there are some key questions to ask yourself before you get started.

How to understand capacity and plan accordingly.

1. **How does this project fit in with other projects that you are already doing?**

Step 1: Make a list of all the major activities/projects/timelines the upcoming months. Include major "events" that might be internal (like staff retreats, major vacations, office closures)

Step 2: Map it out on the Calendar

Figure 1: Flipchart divided into quarters with post its marking major milestones, deliverables, or deadlines

Step 2: Define the Project
Goals: Why
Define the Project: Figure Out What You Are Trying to Do

Determining internal and external goals for your project will help with prioritizing and making sure that you are on track as you lay out your work plan.

Crafting and clarifying goal – Where to find them?

- *Grant proposal for underwriting*

- *Discussion with Executive Director*

- *Strategic planning process*

- *Program planning*

- *Requests for Proposals*

- *Group/Committee work*

How do you know when you're done and you've been successful?

Example:
OK: Fundraising event goals: Have a successful event and raise $100,000

BETTER: 200 people attending; $100,000 total revenue; 50 new donors; fun time had by all; press in SF Chronicle and at least on TV news mention

Your Turn - Step Two: Define the Project by Defining the Goals

What are the goals of this project? *(Ask your executive director and review the grant proposal, looking not only for outcome objectives, but also goals such as raising the profile of your organization or expanding the diversity of your programs. Knowing what the project really needs to do will help you prioritize.)*

Goals: Why
1.
2.
3.
4.
5.

Deliverables: What
Define the Project: Figure Out What Needs To Be Accomplished to Reach the Goal(s)

A process that will break out your project into discrete "products". This approach has benefits for a project manager including:

- Organizing **project plans**
- Organizing & managing **timeline**
- Identify **key resources** needed (including staff time/availability)
- Identify potential **bottlenecks** (critical path & dependencies)
- Identify **decision-making**/approval points
- Identifying the *"must have's"* (deliverables) while giving the team flexibility on how it's accomplished (tasks)
- Effective **communication** of critical information to individuals and/or groups regarding deadlines (and the impact of delays).

Comedy Fundraiser Examples:

- Date/Location Confirmed
- Talent Confirmed
- Direct Mail Piece Mailed Out
- Website Finalized with Online Ticketing
- Press Release Sent to Target Media
- Pitch Story to Target Media
- Corporate Sponsors Confirmed

Your Turn - Step Two: Define the Project by Identifying Deliverables

What specific deliverables or process objectives does your project promise to provide? *(Define the measurable work you will be doing to achieve your goals, such as delivering 12 workshops or placing 15 volunteers. Be sure to document when these items will be accomplished.*

Deliverables: What
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.

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Work Breakdown Structure (mapping out the critical path)

Work Breakdown Structure

Map out the Work: *One goal can have many deliverables; each deliverable can have a further breakdown of simpler tasks.*

Produce successful Comedy Fundraiser (200 attending; total revenue $100,000; 50 new donors; fun time had by all; press in SF Chronicle and at least one TV news

Deliverable A	Deliverable B	Deliverable D	Deliverable E
Tasks: 1 2 3 4 5 6 7 8 9	Tasks: 1 2 3 4 5 6 7 8 9	Tasks: 1 2 3 4 5 6 7 8 9	Tasks: 1 2 3 4 5 6 7 8 9

Deliverable C

Tasks:
1
2
3
4
5
6
7
8
9
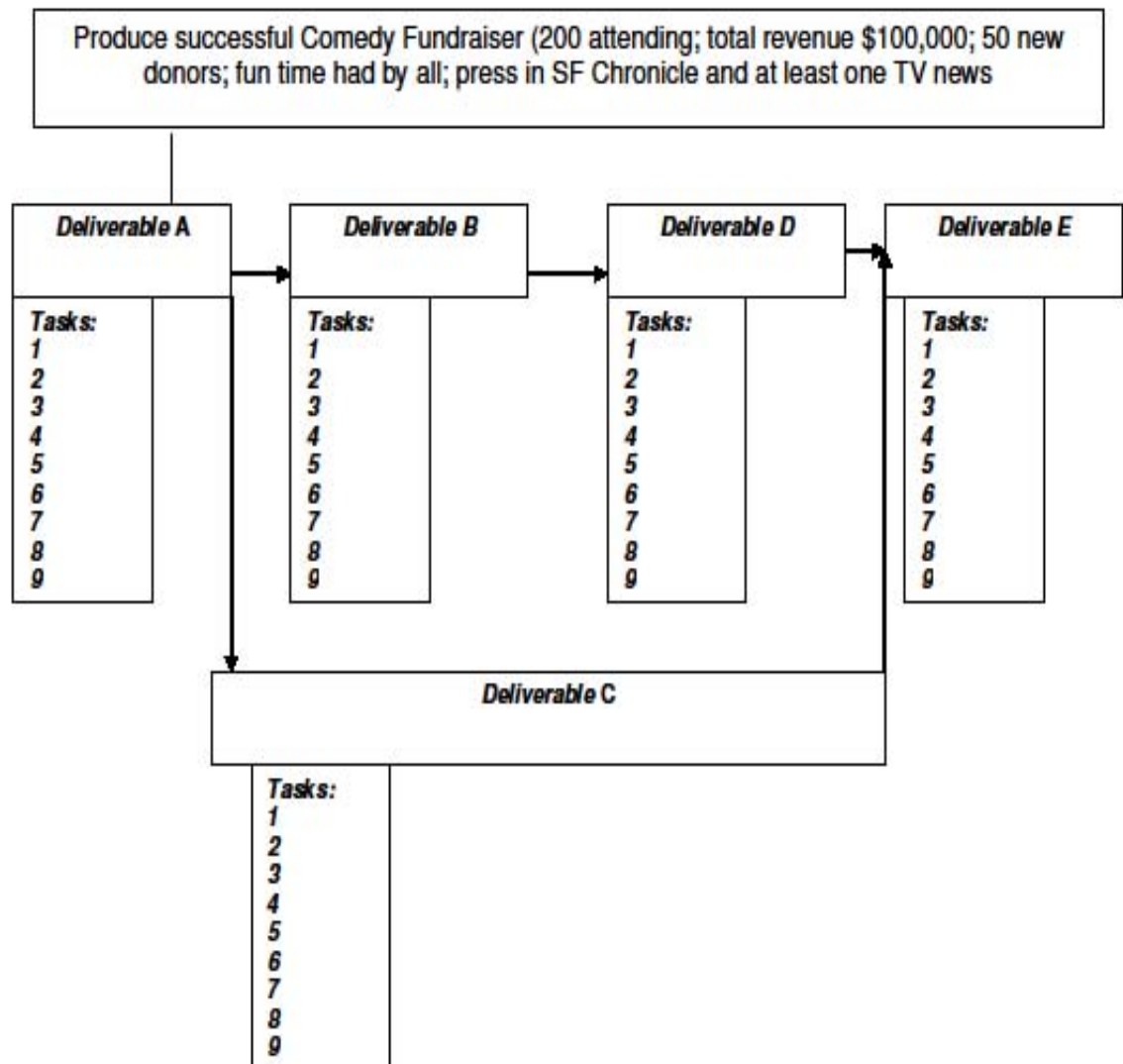
Estimate Costs: Define the Project: Figure Out Your Budget

- **Grant proposals**
- **Finance**
- **Business/Departmental Plans**
- **Create your own (templates)**

Line Item	Cost	Notes
Volunteer Recruitment		
Copying	35	100 5 page packets @ $.05 (recruitment) + 40 5 page packets @ $.05 (follow up)
Postage	105	140 packets @ $.75
Staff time	346	20 hours @ $17.30
Volunteer Applications		
Staff time	865	50 hours @ $17.30
Volunteer Training		
Copying	38	25 30 page packets @ $.05
Food	1000	25 meals x 4 nights @ $10
Room rental	400	4 nights @ $100
Staff time	1,500	60 hours @ $17.30 (program manager) + 16 hours @ $28.85 (ED)
Arts Organization Recruitment		
Copying	16	10 1 page packets @ $.05 (recruitment) + 30 10 page packets @ $.05 (follow up)
Postage	27	10 packets @ $.34 + 30 packets @ $.75
Staff time	173	10 hours @ $17.30
Volunteer Applications		
Travel	400	20 trips @ $20 (mileage + parking)
Staff time	1,730	100 hours @ $17.30

Step 3: Build Your Team
Project Organization Chart

Build Your Team: Who Will Be Involved and How They Relate to Each Other

Clarify: Players, Roles/Responsibilities, Relationships & Communication paths
.

Project Org Chart

Roles & Responsibilities

Build Your Team: How Will You Facilitate the Involvement of Others and What Will They Do?

Reflection questions to help clarify roles and "write them" into project plans.

The responses to the reflection questions below will also help you understand these set particular issues.

**Decision Making
Bottlenecks
Resource allocation
Support**

- *What leadership will want to give input and/or act as sponsor (program directors, board members, executive directors)?*

**Communication
Managing Tasks
Delegation
Bottlenecks**

- *Who is on your "core" project team (the individuals who are accountable for 75 – 90% of the deliverables)? These could include groups/individuals outside your organization (partners, clients).*

**Resource allocation
Bottlenecks
Timeline/Timing**

- *Who holds information, specific skills/talents/experience that is essential to your project and/or deliverable?*

**Communication
Role Clarity
Bottlenecks
Decision-making**

- *Who outside your organization will be involved? What is their ideal role? What are some key barriers to working with them in their ideal role?*

Role	Participants	Responsibilities
Sponsor	Executive Director	Guide organization. Provide resources for program expansion.
Project Manager	Program Coordinator	Keep project moving forward; manage schedule, resources and budget. Review deliverables.
Project Coordinators	Program Coordinator, Consultant	Carry out project tasks.
Advisory Committee	Board member, volunteer coordinator, arts organization manager, current volunteer	Provide advice about the development of the new program and help market it upon implementation. Offer insight into how program can be tailored to meet East Bay needs. Provide guidance on how to strengthen BVA program overall.

Project Management Roles and Responsibility Chart (Example)

Roles (in project)	Who (name)	Key Activities/Accountabilities
Project Manager	***James Lee***	- Create the project timeline and plan with staffing roles - Update project status sheet - Communicate to project team re: status updates - Schedule project meetings - Manage project documents and store in central accessible location - Analyze budget at stated timeline with program director - Provide data/information to development staff to create grant reports as needed - Provide status report to project sponsor on monthly basis.
Primary Issue Experts	**Jeanne Peters** Karl Smith Marco Sans	- Input on timeline and plan - Participate in content decision meetings - Feedback on drafts - Sign off on all drafts (including final) - Provide a list of recommended reviewers - Speak at state assembly meetings - Input on title of report
Expert reviewers	TBD (possible board members)	- Read and provide feedback on first draft and near final draft
Administrative Support	Karen Garcia	- type up all notes from meetings and save on central file location - setup conference/web call lines for meetings - point of contact for outside expert reviewer
Project sponsor	**Jeanne Peters**	- Approve budget and budget revisions - Sign off on title of report - Point of contact for funders - Sign off on all grants proposals and reports - Sign off on how funders are represented on final report - Sign off on timeline - Sign off on staffing plan.
Copy editor	***James Lee***	- Copy edit all drafts - Recruit other copy editors for final review. - Feedback on flow structure of report.
Report designer	***James Lee***	- Create overall design of report - Draft basic graphics - Hire and manage outside graphic designer - Create the final report design - Create the final draft report (with all the final content).

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	Partners/Ste	Nelson	Jeanne	Cristina	Yasya	Sierra	Molly	Marla	Marissa	Sarah	Adriana
Deliverable/Category: Event Logistics											
Registration	r	a	i		p		i	i	i		s
Create staffing chart for day		p			a					i	
Oversee Day off logistics (material delivery, etc.)		p			a						
Tech nology		p			a						
Catering - order/confirm		p			a						
Presenter Support (handouts, instructions, etc.)		p			a						

Peninsula/Silicon Valley Forum

Project Roles & Responsibilities

Core Project Team: Nelson, Yasya

Staff:

LEGEND
P= Participant
A= Accountable
R= Review Required
I= Input Required
S= Sign-Off Required

P= Participant (Contributes to project in various ways, but does not hold ultimate accountability or authority; eg: a team member)

A= Accountable (Holds ultimate responsibility for project deliverables; Generally project manager unless delegated out)

R= Review Required (Must review various deliverables to provide feedback (eg: grant proposal, outreach material, evaluation plan)

I= Input Required (Must be consulted regarding information that is essential prior to the task/deliverable; does not need to be a team member)

S= Sign-Off Required (Ultimately approves specific deliverables (eg: goals, timeline, budget)

Step 4: Map out the Work
Work Breakdown Structure
Map out the Work: *One goal can have many deliverables; each deliverable can have a further breakdown of simpler tasks*

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> **Goal:** Improve the quality of arts organization management in the East Bay, particularly in outlying areas

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> ***Deliverable***:
> Recruit and train 20 additional volunteers that either live or work in the East Bay this

> ***Deliverable:***
> Match pro bono consultants with 15 East Bay arts organizations this year

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Tasks:
Volunteer Recruitment
- ❖ Gather list of corporate volunteer coordinators
- ❖ Compile fact sheet, cover letter & applications. Mail to contacts
- ❖ Send info to the Volunteer Centers
- ❖ Write PSA and mail
- ❖ Answer phone inquiries and send packets

Volunteer Applications
- ❖ Read incoming applications. Contact to schedule interview
- ❖ Flag likely problem areas
- ❖ Conduct interviews
- ❖ Enter info into database

Volunteer Training
- ❖ Review timing of events schedule for the year
- ❖ Determine best dates/reserve rooms
- ❖ Recruit trainers for volunteer orientation
- ❖ Create materials for packets
- ❖ Compile files on arts applicants
- ❖ Order food and beverage

Tasks:
Consultant Recruitment
- ❖ Gather list of consultants
- ❖ Compile fact sheet, cover letter & requests. Mail.
- ❖ Answer phone inquiries and send packets

Matches
- ❖ Collect consultant resumes, expertise, etc
- ❖ Collect needs from arts organizations
- ❖ Select best matches for each organization
- ❖ Call consultants & organizations to inform of choice and schedule match meeting
- ❖ Conduct match meeting and write up contracts
- ❖ Enter info on match into database

Work Breakdown Structure

Map out the Work: One goal can have many deliverables; each deliverable can have a further breakdown of simpler tasks.

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┌─────────────────────────────────────────────────────────────────────┐
│  Produce successful Comedy Fundraiser (200 attending; total revenue  │
│  $100,000; 50 new donors; fun time had by all; press in SF Chronicle │
│  and at least one TV news                                            │
└─────────────────────────────────────────────────────────────────────┘
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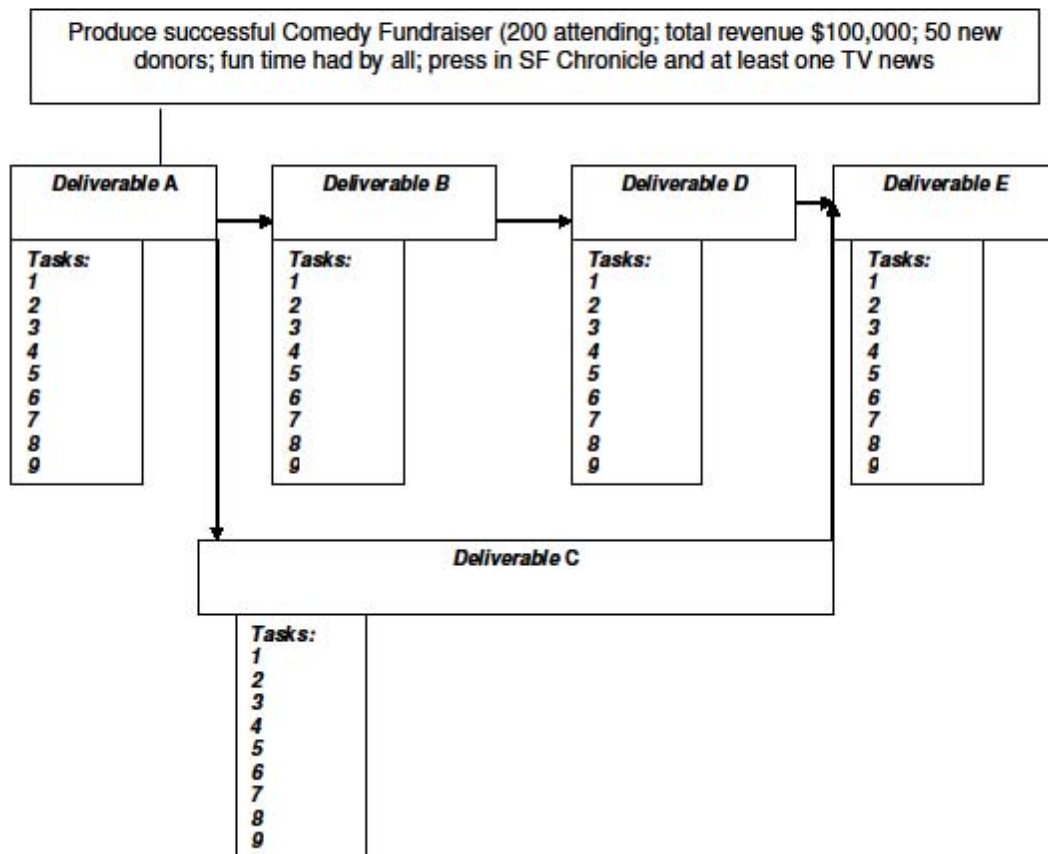
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Deliverable C

Tasks:
1
2
3
4
5
6
7
8
9

orksheet
Work: Who is Doing What?
ws you to lay out a timeline.
le below to start a list AND/OR use the timeline/mapping calendar process if you're trying to capture
ssible.

	When Does it Need to be Finished?	How Long Will it Take?	What Has to Be in Place First?	Who Will Do This Task? (task owner); other roles?	Resources?
eeds to					

Step 5: Track Progress

Tracking Progress

- Where are you?
- What has changed (new information, timeline, goals)?
- What needs to change?
- Who should be involved?
- How will you communicate?

Using a deliverable-based work breakdown structure allows you to see impact of missed deadlines, delays, or unexpected occurrences on the "critical path" of the project. This can support more effective communication to team members, sponsors, clients, and partners.

Task Management	Project Management
Focused on what's next	See's what's next AND attends to the entire timeline
Communicates upcoming or recently missed deadlines	Communicates the impact of missing deadlines
Staffing: focused on who is "doing" the next set of tasks	Staffing: is clear on who is "doing" tasks AND is organizing/reorganizing staffing way beyond the next set of tasks and identifies potential bottlenecks.
Finances: is limited to what is already allotted and/or spends with very little or no limits. Only understands finances "after the fact"	Finances: Understands areas of flexibility and makes decisions on "current" information. Forecasts expenses and makes forward-looking decisions.

Your Turn - Step Five: Set Up Tracking Processes

How will you track progress? How will you know the impact of delays, missed deadlines, or incomplete deliverables?

How will you record issues that come up and make sure that you follow up on them?

Will you document how much time certain components take to complete? If so, how?

How will you track expenses, burn rate, staffing hours?

Project Management Software

What's project management vs. "task management"

Planning
- Start/End Dates
- Role Assignments
- Calendar/Timeline
- Critical path
- Flexibility Ease - changing dates, deliverables, roles

Tracking
- Start/End Dates
- Role Assignments
- Calendar/Timeline
- Status/Completion
- Communication
- Notes/follow up
- Resources/budgets

Collaboration
- Ease of adoption
- Accessible
- Permissions
- Versioning/Drafts
- Document or knowledge management
- Discussion tracking

Questions:
- ❑ Is it the appropriate tool (what need are you trying to meet)?
- ❑ Ease of adoption and implementation
- ❑ Accessible
  - Geographic
  - Technology Platform/Format
  - User knowledge

List Three Things You Will Do or Share After This Workshop

Examples:

I will define the "who" (sponsor, project manager) and their responsibilities for my current project.

I will read articles on Project Management Software .

I will introduce the "Post It" note exercise to my organization.

1.

2.

3.

NOTES:

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