



Successful Project Management

Nelson L. Layag
info@layag.com

Workshop Agenda

9:30 – 10:00 Introductions, Agenda, Outcomes, Housekeeping,

10:00 - 10:45 Group Exercise, Project Management Definitions & Intro to the Five Steps

10:45 – 11:00 Break

11:00 - 12:15 The Five Steps in Action

12:15 – 1:15 Lunch

1:15 – 1:30 Questions, review morning, review pm agenda

1:30 - 4:00 The Five Steps in Action and using technology for project management (includes 15 minute break)

4:00 – 4:30 Next Steps, Requests, Priorities, Final Comments, Evaluations

- Identify key issues, challenges, barriers for effective project management for the organization.
- Provide an introductory overview of project management concepts

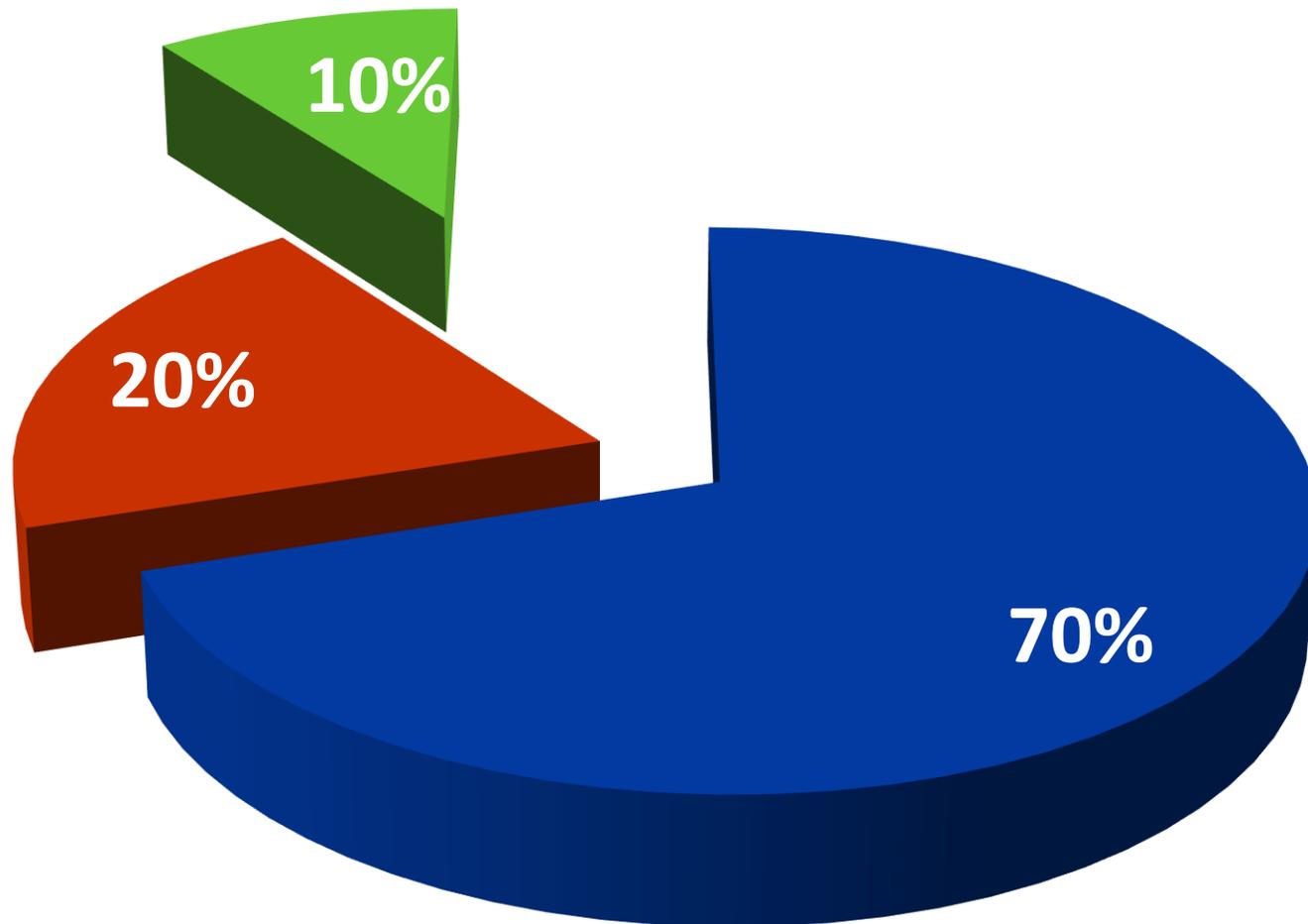
-
- Build upon (add to/revise/improve) current tools and processes the organization is currently using for project management
 - Develop an achievable list of clear and actionable items that you can adopt as an organization and/or individual to improve your ability to manage projects.

Earlier & Better (not perfection)



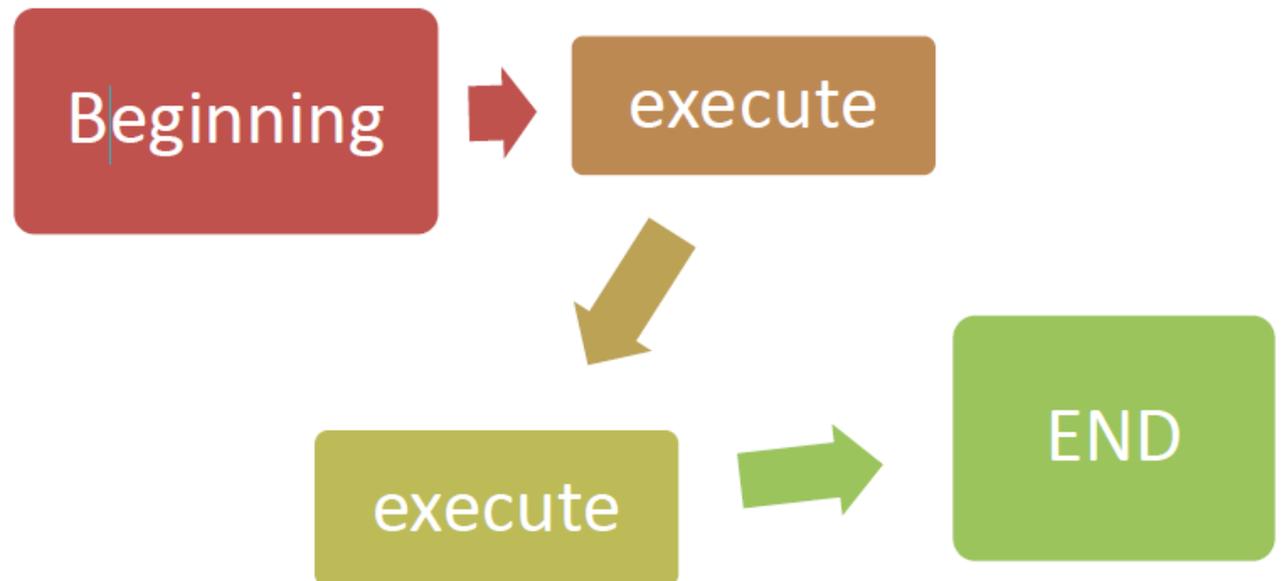
Professional Development

■ On the Job ■ Peer/Mentor ■ Formal



Project

- BEGINNING and an END
- Clearly defined, realizable goals (more specific than creating world peace)



Project Manager –

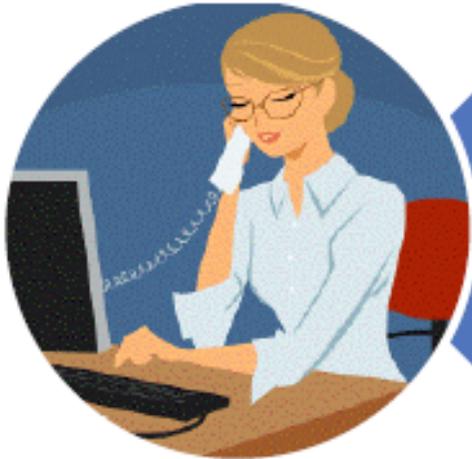
- ONE person
- Main job is to keep project moving forward
- Coordinates activities
- Tracks progress and budget

On Time and On Budget

Project Sponsor

- Defines (or approves) goals
- Provides(or approves), deployment and reallocation of resources
- Approves deliverables
- Authorizes changes in scope, timing, deliverables
- Provides support for issues beyond the project managers scope of authority

Project Sponsors



Can be a single individual.

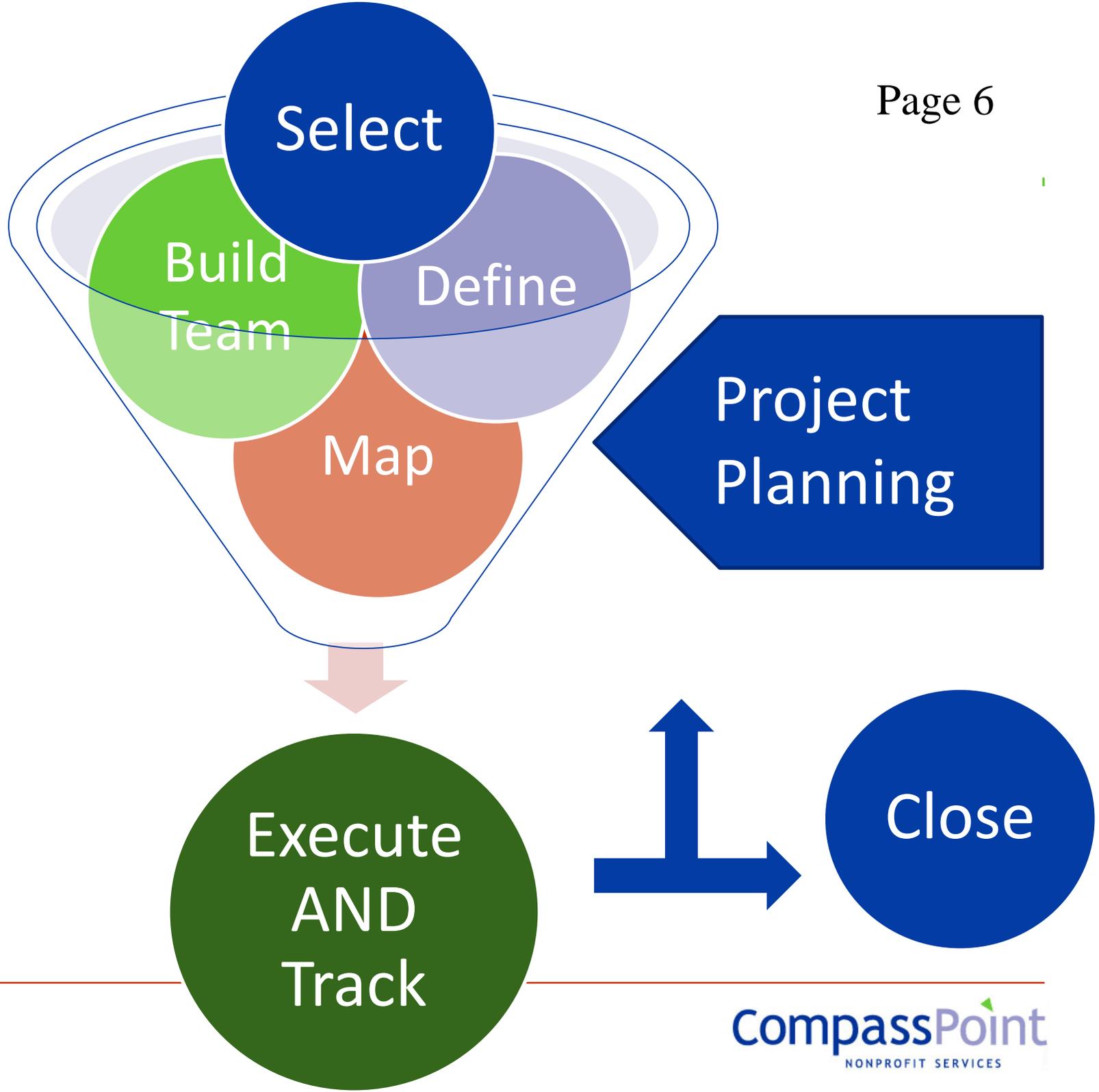
- Internal examples: executive director; program director
- External examples: client; funder; project partner



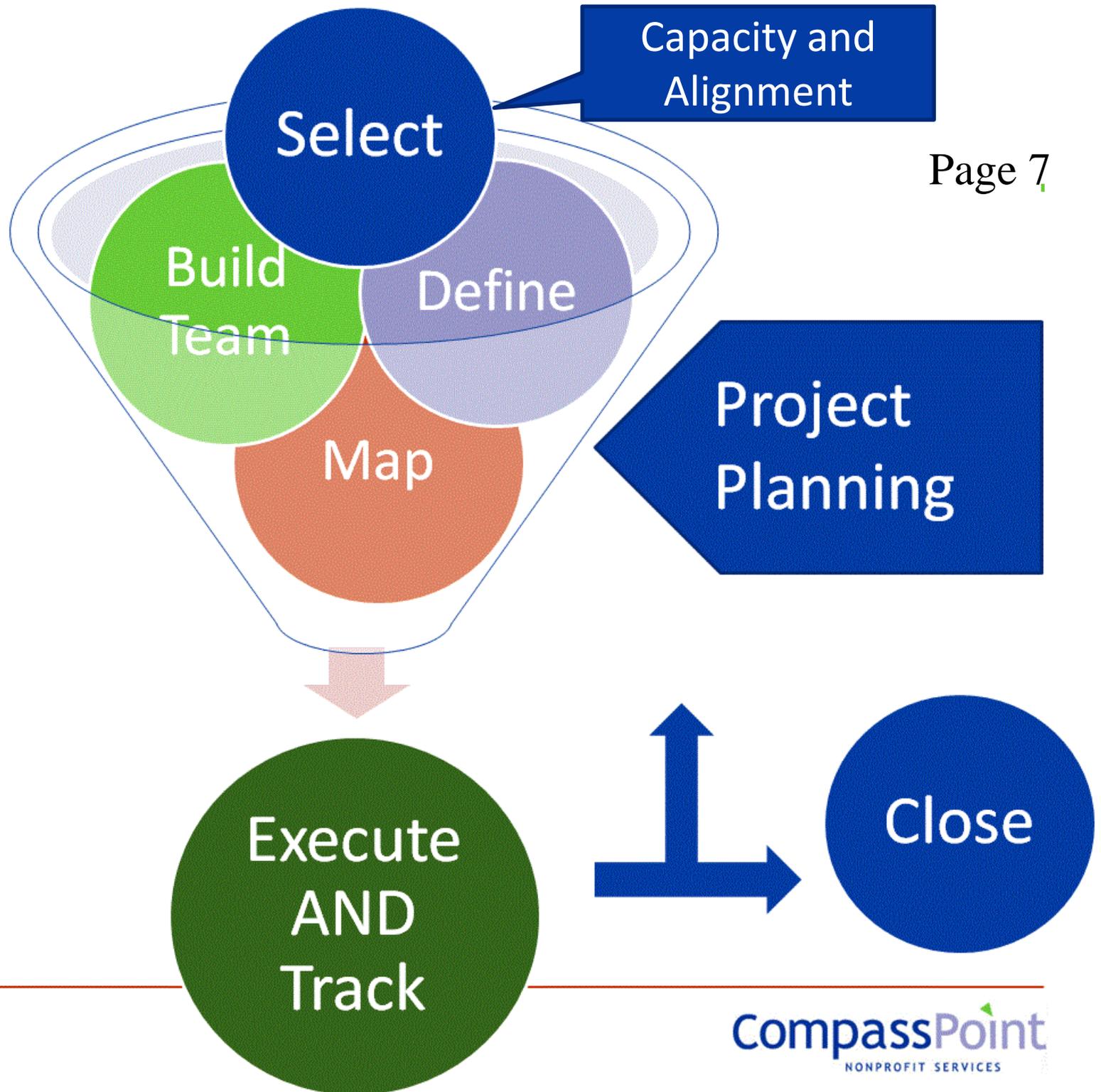
Can be a group.

- Internal examples: management team; board of directors; committees
- External examples: steering committees; collaborative councils; partner organizations

5 Steps of Project Management



5 Steps of Project Management



The 5 Steps of Project Management

Page 8

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?

Gantt Chart (Multiple Projects) – 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				



July 2013							August 2013						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6					1	2	3
7	8	9	10	11	12	13	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24
28	29	30	31				25	26	27	28	29	30	31

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	Jun 30	Jul 1	2	3	4	5	6
Jun 30 - Jul 6							
	7	8	9	10	11	12	13
Jul 7 - 13							
	14	15	16	17	18	19	20
Jul 14 - 20							
	21	22	23	24	25	26	27
Jul 21 - 27							
	28	29	30	31	Aug 1	2	3
Jul 28 - Aug 3							

* = must
- = no control

Create
Mktg
Projects

Q1

Jan

Feb

Mar

Mktng Strategy ^{08/Nov '11}

PROCESS
for
MINING
CONTENT

FPN *

Network
Growth ^{with}
STRATEGY

HRN *

Conf & Workshop

WEBINAR
STRATEGY ^{08/11}

Sub
Regional
Planning
^{Nov '11} *

ED101

MANAGERS
PEER Jan '12

Mgmt
101

Conference ^(SULEB)
Strategy

"Market to
Organizations"
Strategy = ^{PRICE} ^{LEARNING}

PRICING
STRUCTURE
Dec '11

ADOBE *
TRAINING
RESP/STRAT Oct '11

*
CERTIFICATE
Oct '11

Board
Match
vol Ctr *

Jan '12
WEBINAR
WEEK

SVP *
FORUM
Oct 2011

EAST
BAY ^{Oct '11}
FORUM *

SEELI *

NTEN? *

Assessments
Evaluations

CRM *
Phase
END?

Q2

April

May

*
WEBSITE
Better
Presentation
of Workshop
Learning
Paths

Jan

ED101

Eval Mini Report

Yasya & Erin - Network
evaluation plan

• ED101
Captures stories

• Content
Coaching Hours
Product

FEB

• Next Steps

• VP #1

• Office Mgr

• Choice Point Discussion

• Certificate
closure

ED101
Alumni
meeting

Website (end of Feb)

MARCH

• VP #2

• Webinar Week

• EB FORUM

• MGMT INST

• Curriculum ^{start}

• Int. Comm

• Mgmt

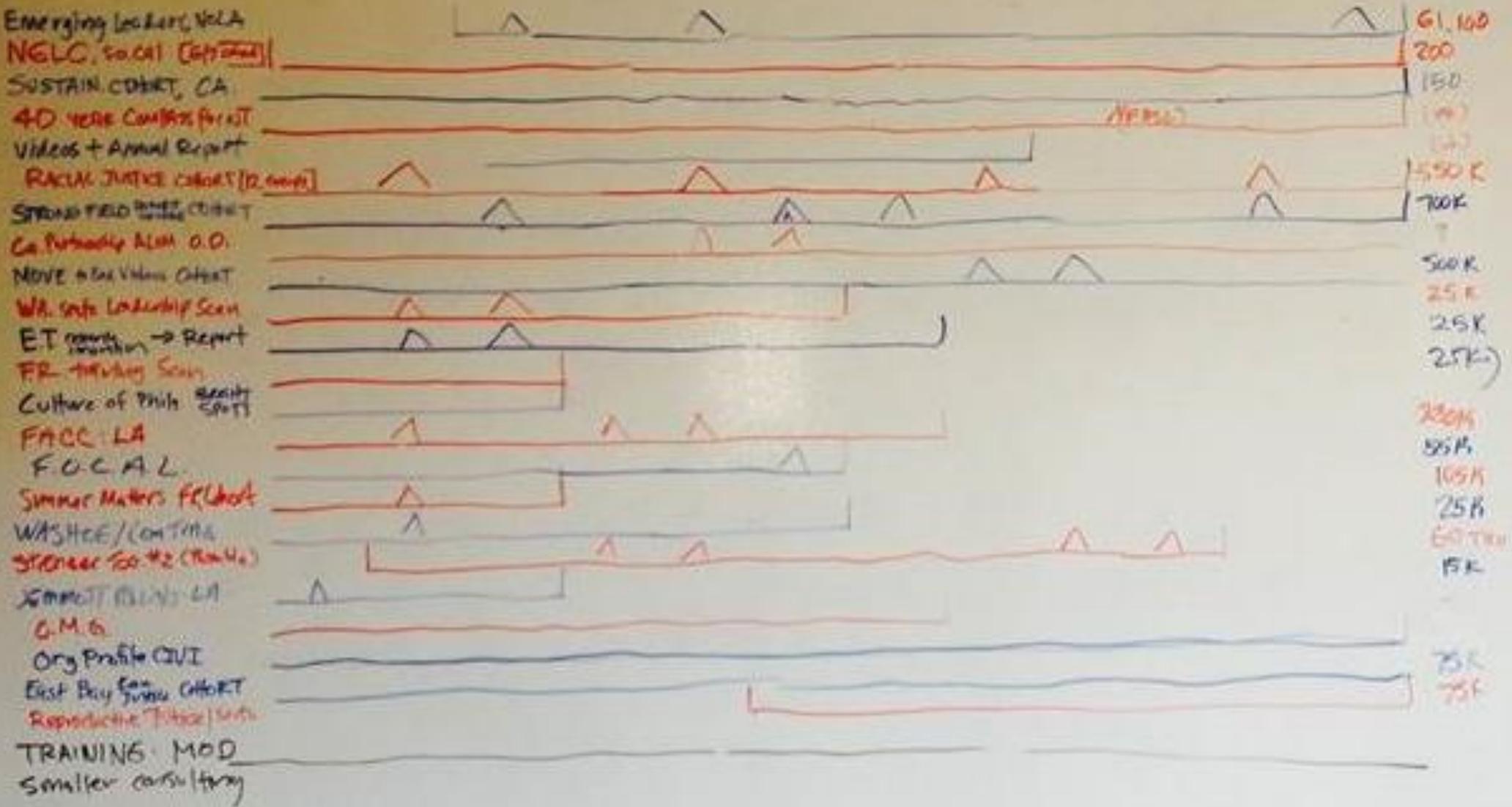
• Bring to Com. Com
Story purpose?
(all Practice)

APR

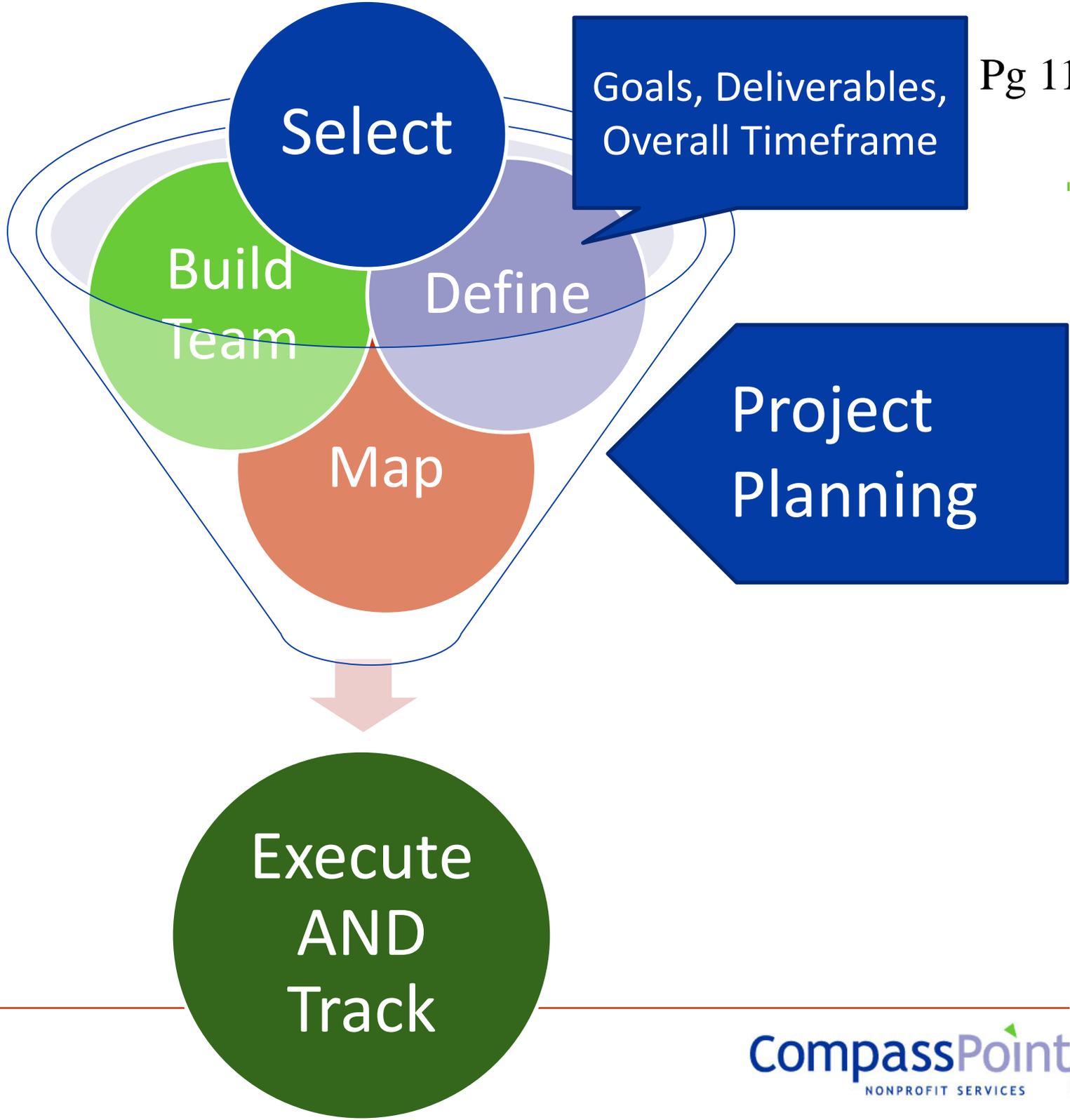
Program

• Bear
Go
Curr
R

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec K



5 Steps of Project Management

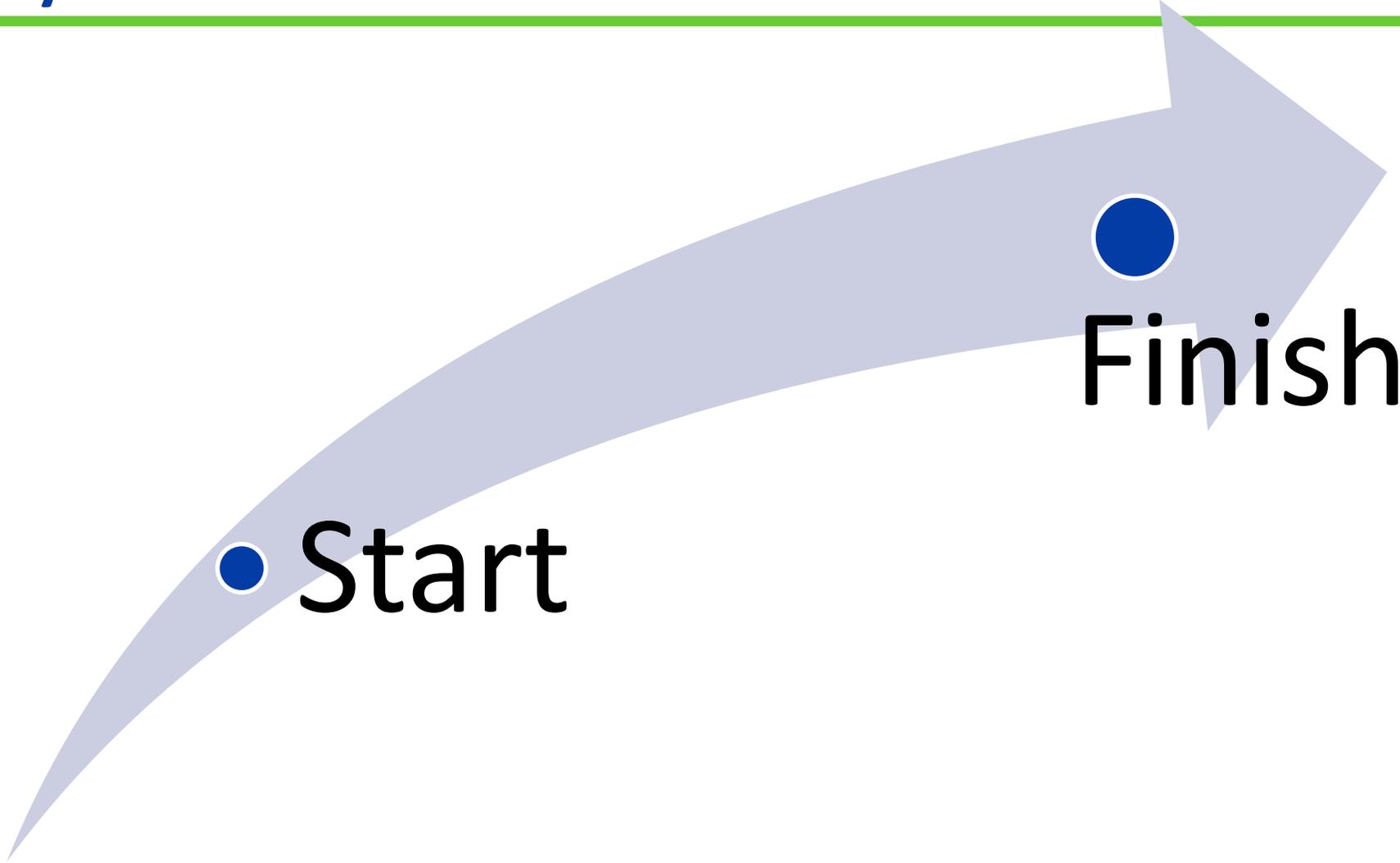


The 5 Steps of Project Management

2. Define the Project

Determine what all the ultimate purposes of the project are, what specific deliverables your project will create, if there are any set timeframes, and what the budget is.

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



Goals

Example One:

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

Example:

OK: Fundraising event goals: Have a successful event and raise \$50,000

BETTER: 300 people attending; \$50,000 net revenue; 50 new individual donors; 3 new sponsors; fun time had by all; social media shares and mentions during the event (see Facebook, Instagram, Twitter metrics); TV news coverage on at least one local station.

Simplified (YES/NO Goals)

Project: Implementation of volunteer registration and tracking system

- Can volunteers register without assistance?
- Are critical reports accurate and easily run?
- Can we track activity information accurately and quickly?
- Can staff execute all mission critical functions?

Deliverables based project planning

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”.

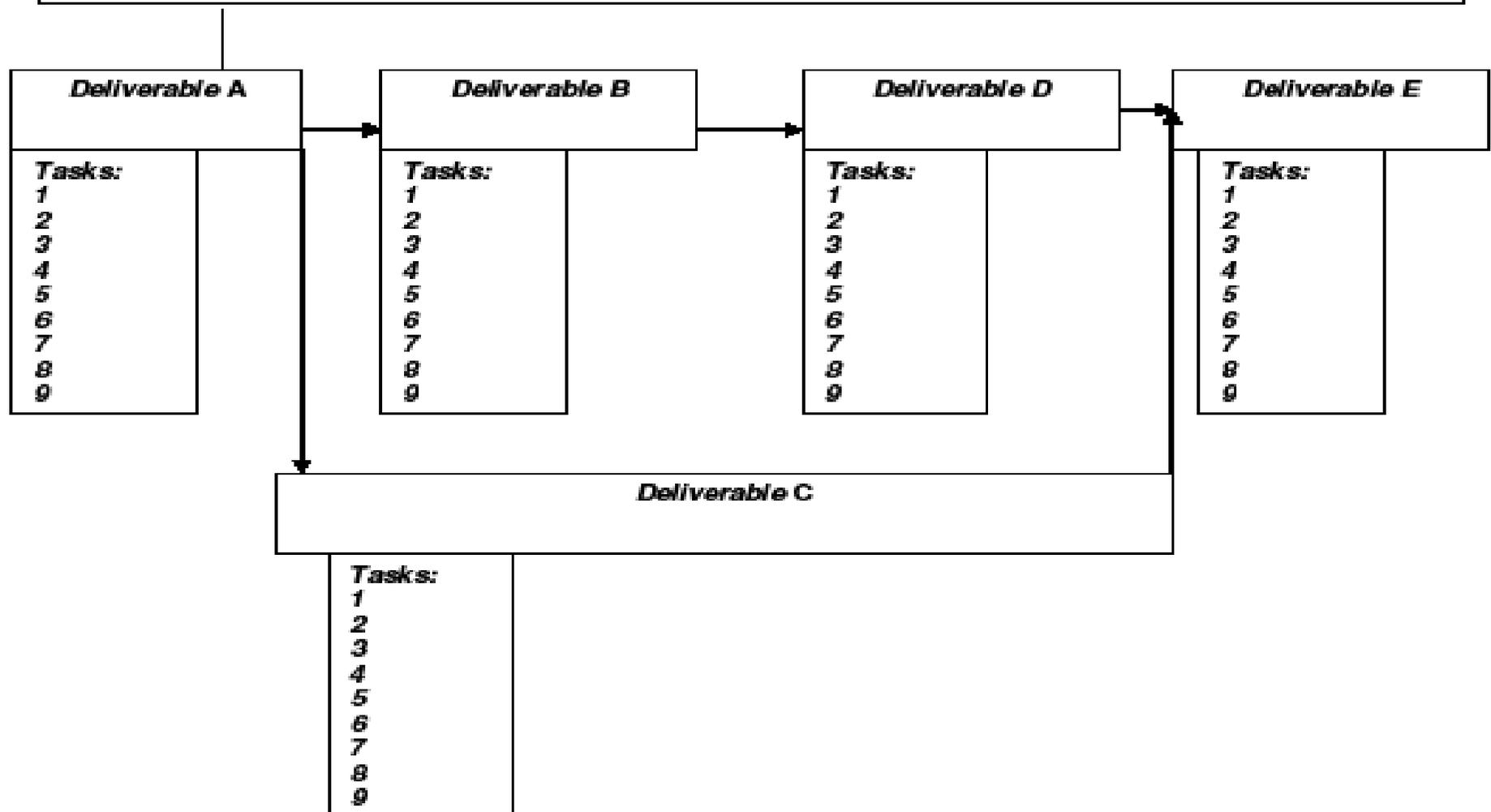
Benefits of Deliverables Based Planning

- 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)

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)



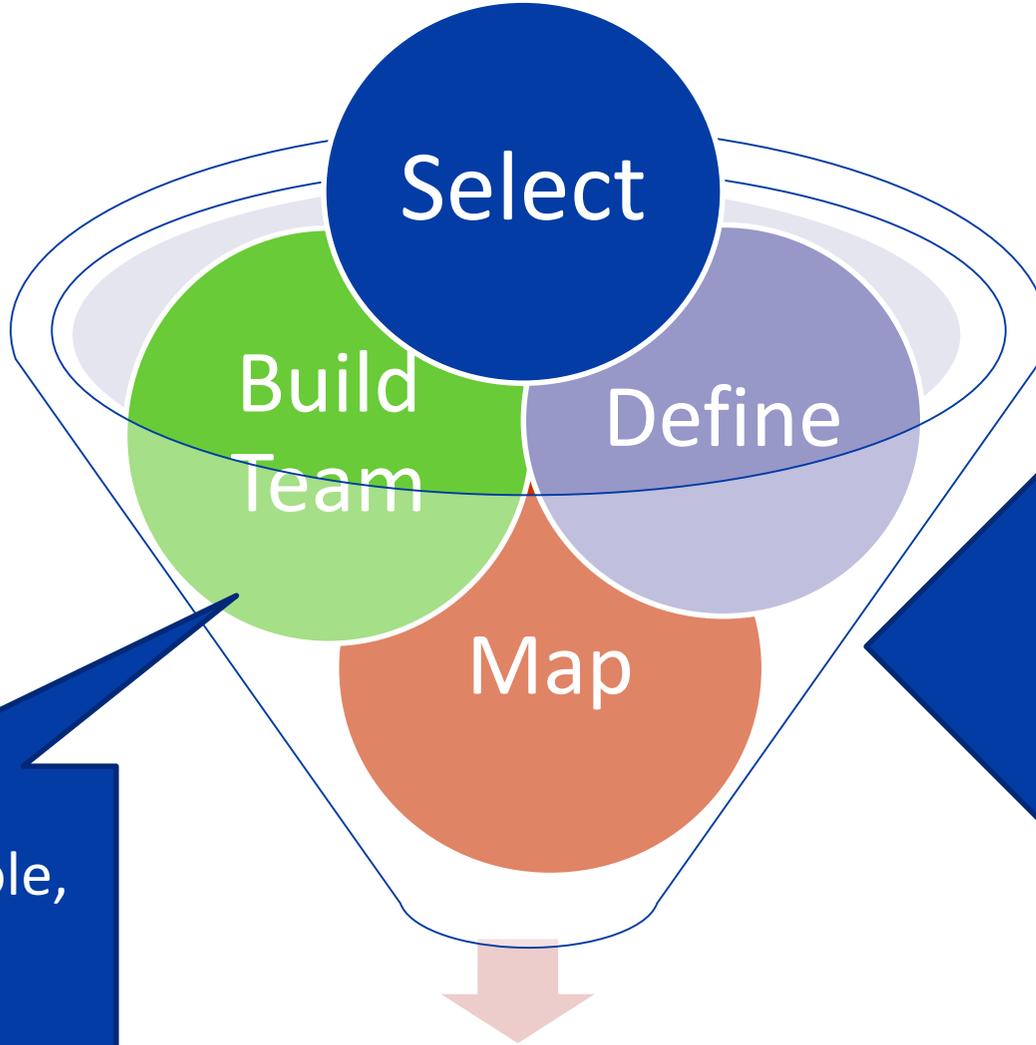
Project Budgets

If you're ultimate responsibility is to be "on time and on budget" you must know and understand the budget.

Where to find budgets (or parts of budgets)?

- Grant proposals
- Finance
- Business/Departmental Plans
- Create your own

5 Steps of Project Management



Project Planning

Leadership's Role, Peers, Resources

Execute AND Track

Build Your Team



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

Decision Making
Bottlenecks
Resource allocation
Support

Communication
Managing Tasks
Delegation
Bottlenecks

Resource allocation
Bottlenecks
Timeline/Timing

Communication
Role Clarity
Bottlenecks
Decision-making

- *What leadership will want to give input and/or act as sponsor (program directors, board members, executive directors)?*
- *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).*
- *Who holds information, specific skills/talents/experience that is essential to your project and/or deliverable?*
- *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?*



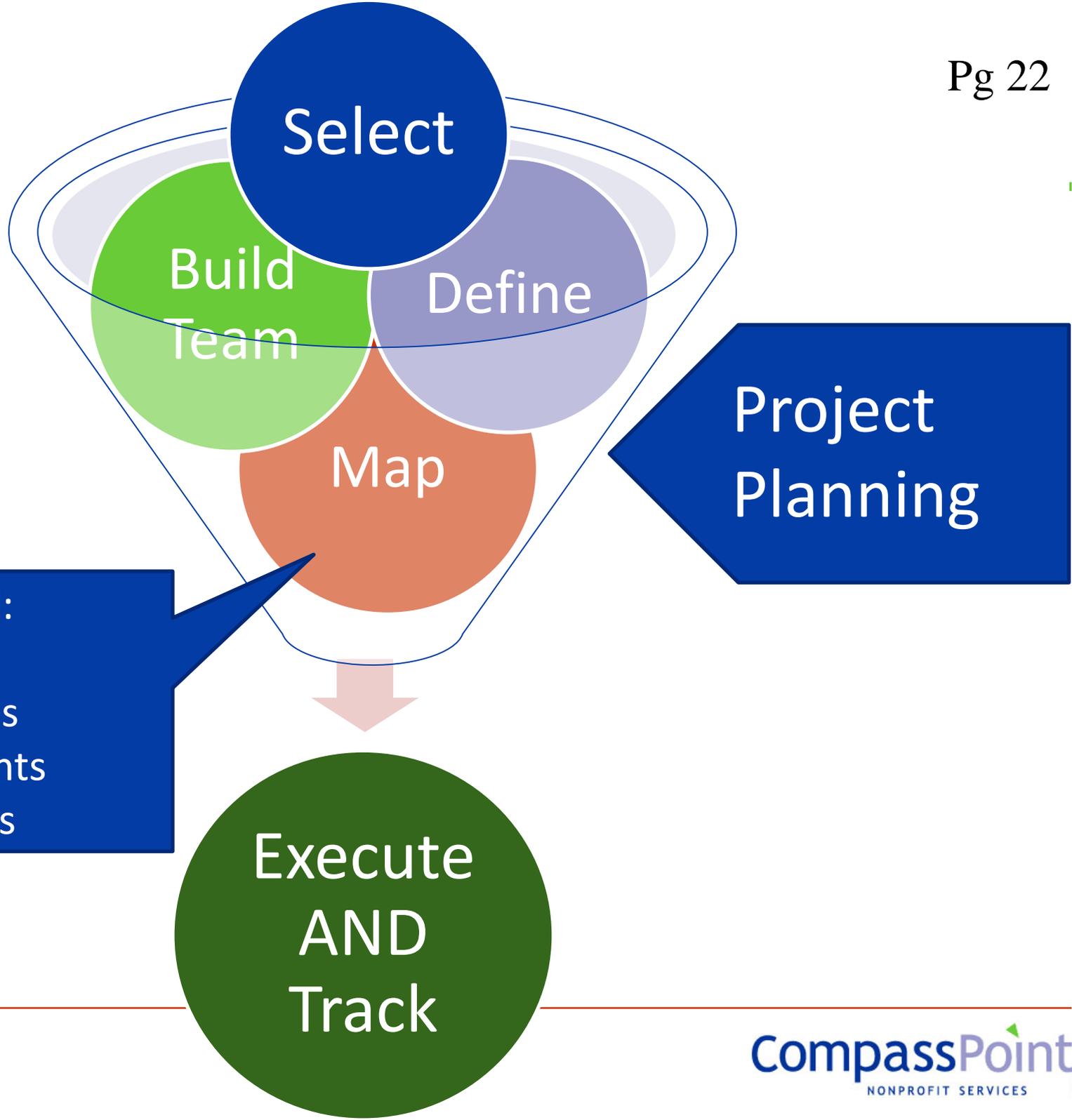
Role	Participants	Responsibilities
Sponsor	Executive Director	Guide organization. Provide resources for program expansion.
Project Manager	Program Coordinator	Keep project moving forward; manage schedule, resources and budget. Review deliverables.
Project Coordinators	Program Coordinator, Consultant	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)

<u>Roles (in project)</u>	<u>Who (name)</u>	<u>Key Activities/Accountabilities</u>
Project Manager	<u>James Lee</u>	<ul style="list-style-type: none"> - 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.
<u>Primary Issue Experts</u>	Jeanne Peters Karl Smith Marco Sans	<ul style="list-style-type: none"> - 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
<u>Expert reviewers</u>	TBD (possible board members)	<ul style="list-style-type: none"> - Read and provide feedback on first draft and near final draft
<u>Administrative Support</u>	Karen Garcia	<ul style="list-style-type: none"> - 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
<u>Project sponsor</u>	Jeanne Peters	<ul style="list-style-type: none"> - Approve budget and budget revisions - Sign off on title of report

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	Peninsula/Silicon Valley Forum							LEGEND							
2	Project Roles & Responsibilities							P= Participant							
3								A= Accountable							
4	Core Project Team: Nelson, Yasya							R= Review Required							
5								I= Input Required							
6								S= Sign-Off Required							
7	Staff:	Parthers/Ste	Nelson	Jeanne	Cristina	Yasya	Sierra	Molly	Marla	Marissa	Sarah	Adriana			
37	Deliverable/Category: Event Logistics														
38	Registration	r	a	i		p		i	i	i		s			
39	Create staffing chart for day		p			a					i				
40	Oversee Day off logistics (material delivery, etc.)		p			a									
41	Tech nology		p			a									
42	Catering - order/confirm		p			a									
43	Presenter Support (handouts, instructions, etc.)		p			a									
44															
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5 Steps of Project Management

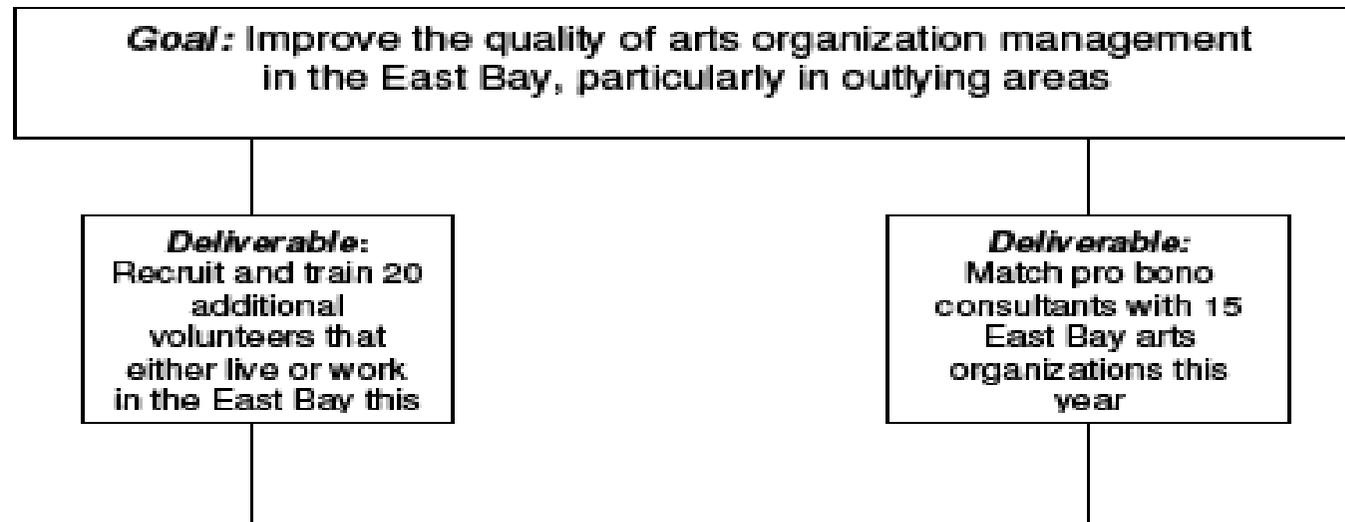


4. Map Out the Work

- Specific things you need to do
- When they need to be done
- How long each step will take
- What steps are dependant on other steps
- Who is responsible for what
- How much money you can spend on each part of the project

Work Breakdown Structure

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



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

Tasks:

Consultant Recruitment

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

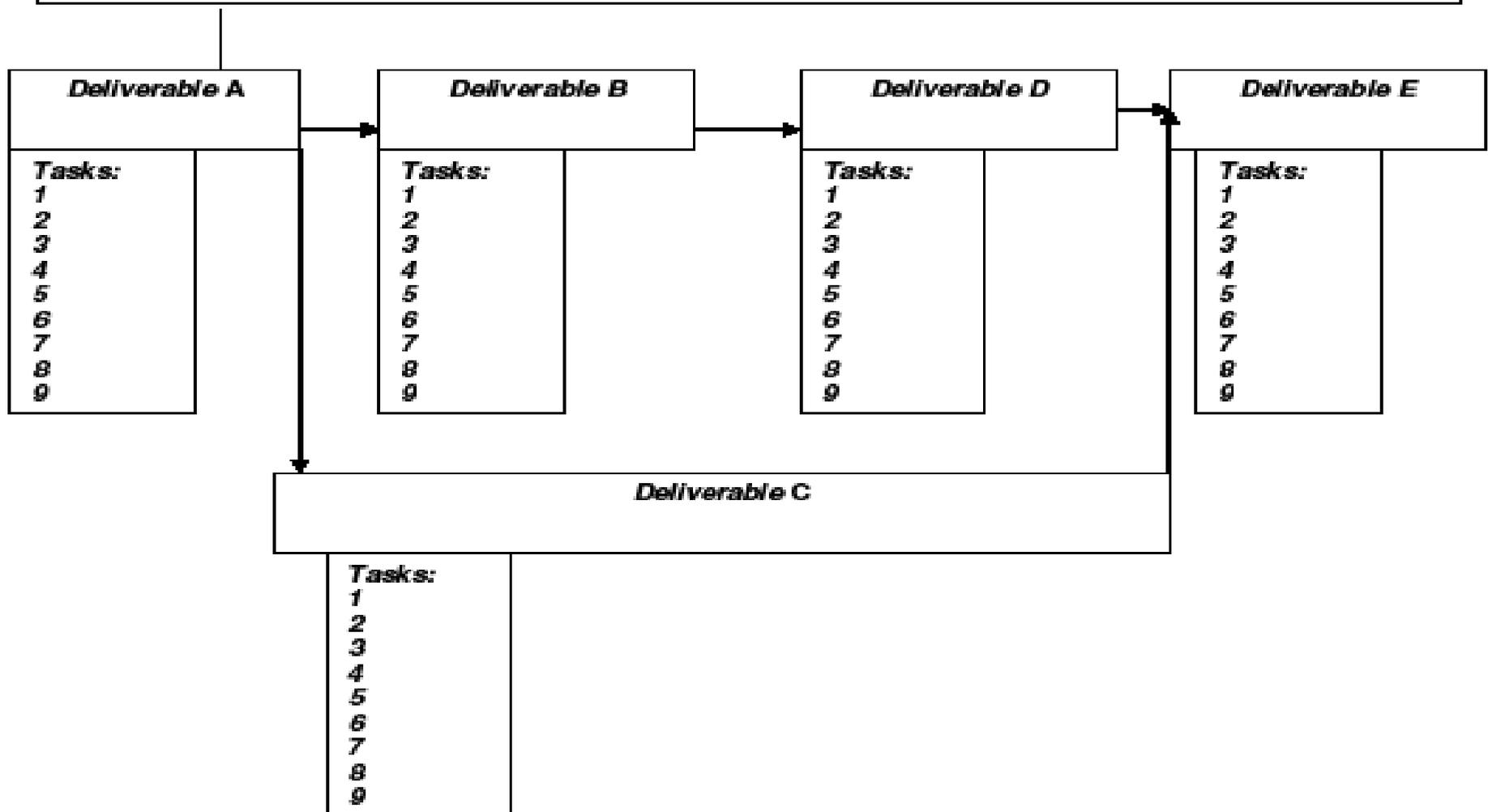
Matches

- ❖ 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

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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Task List Worksheet

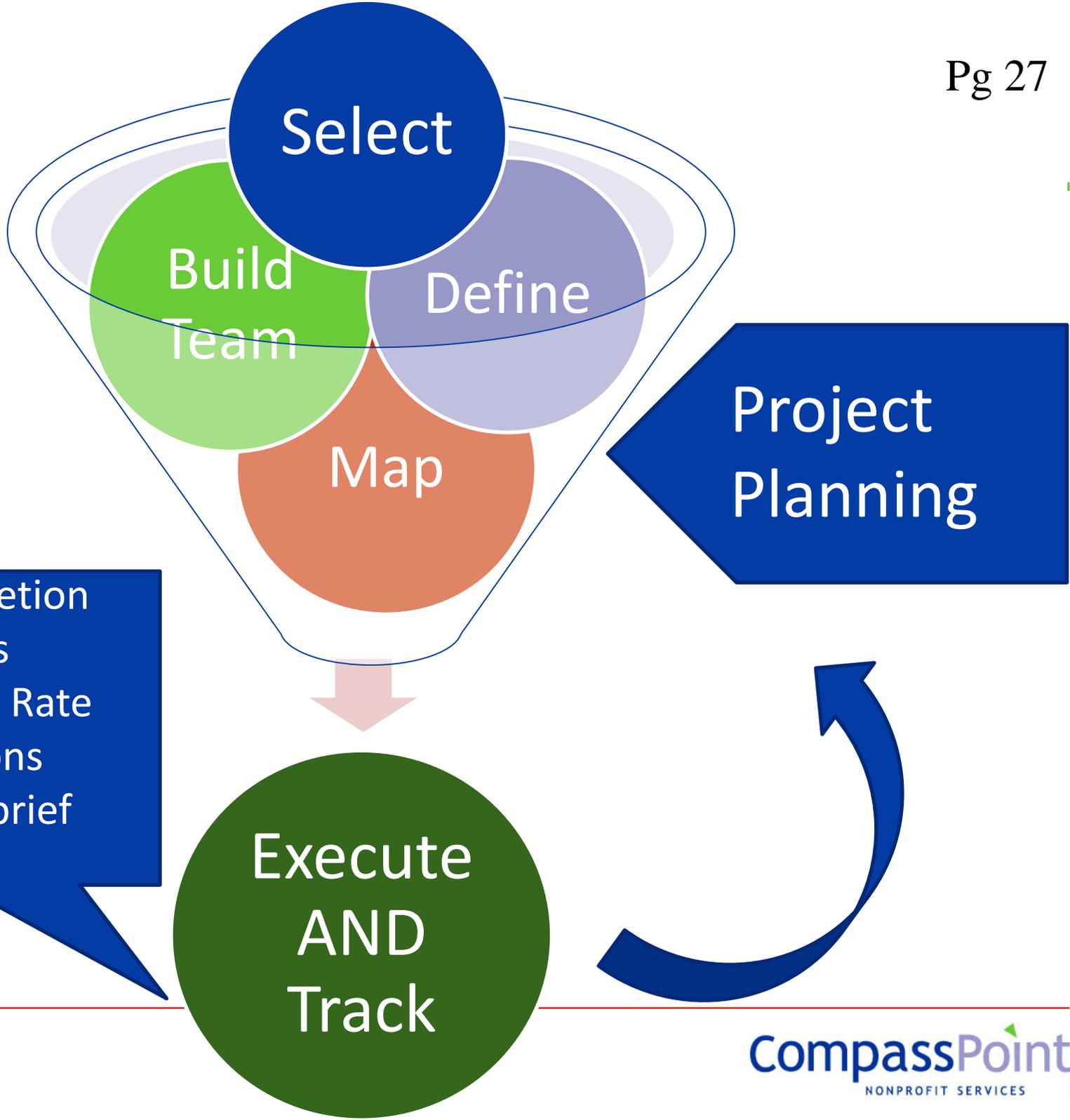
Map Out the Work: Who is Doing What?

This process allows you to lay out a timeline.

You can use the table below to start a list AND/OR use the timeline/mapping calendar process if you're trying to capture as many tasks as possible.

DELIVERABLE:					
Tasks: How? <i>What Needs to be Done?</i>	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?

5 Steps of Project Management



- Status/Completion
- Issue Lists
- Expense/Burn Rate
- Plan revisions
- Evaluate/Debrief

The 5 Steps of Project Management

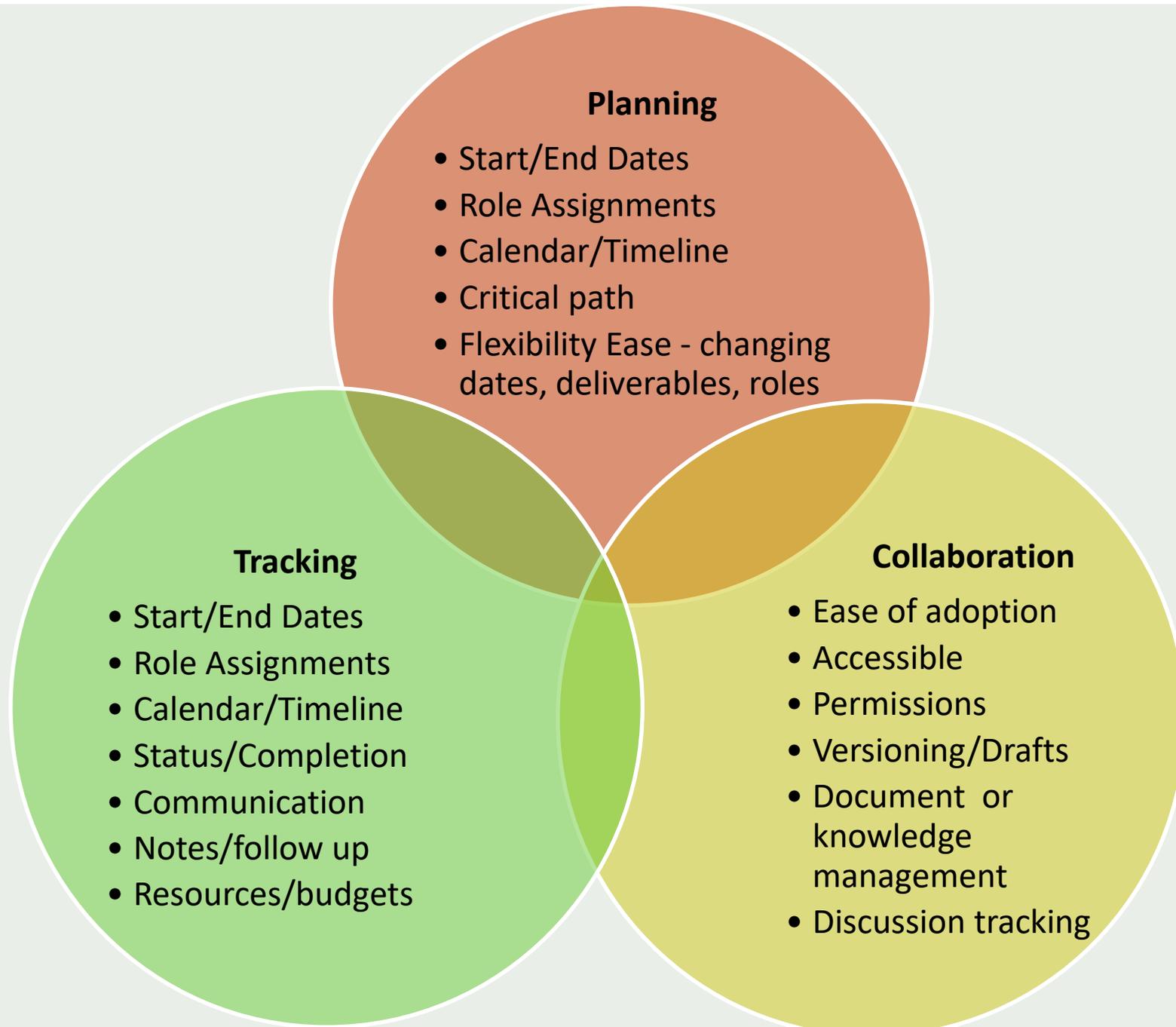
5. Track Progress

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

Task Management vs. Project Management

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.

Project Management Software

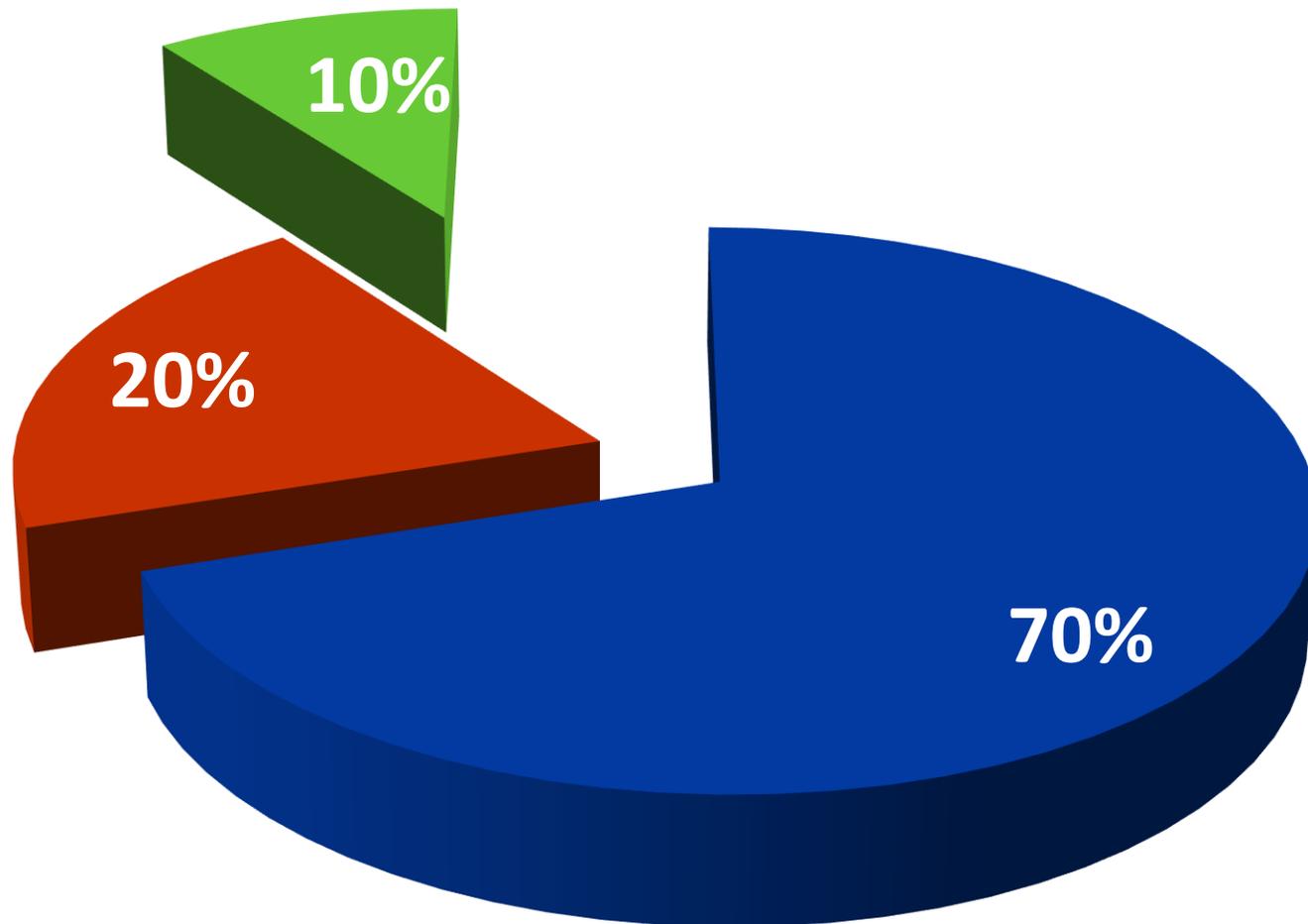


Earlier & Better (not perfection)



Professional Development

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Action Plan

Pain Points AND Maximum Return

Quick/Small Wins:

“ . . . small victories can often trigger a positive spiral of behavior . . . ”

- Switch, How to Change Things When Change is Hard

What are your next steps?

Wrap up & Evaluation

- Resources will be emailed after workshop
- Email me with questions:
info@layag.com
- Evaluation



