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## PROJECT MANAGEMENT TOOLS

As your project unfolds, unanticipated challenges inevitably will occur. Underestimating the amount of time needed to accomplish parts of the project, becoming overwhelmed with details at the expense of goals, and wasting collaborative energy on inefficient meetings can present obstacles to progress. Setbacks like these can usually be avoided with good planning and the right management tools. This section contains worksheets and exercises to help you meet those unexpected challenges.

### **Lessons Learned From Girls Can!: Expect the Unexpected**

Girls Can! project directors faced a number of hurdles as they implemented their projects. In one case, a project director was laid off from her teaching job because of budget cuts. Without a contingency plan in place, she and other project team members scrambled to appoint a new project director. At another site, when the school administration changed the sports schedule, several girl athletes who had planned to participate in the project could no longer attend. The project directors were required to find a new workable time slot for their activity. This setback almost caused them to cancel the project.

### **How to Use This Section**

This section can help you prepare for and effectively handle similar contingencies. Use the strategic planning tools to draft and refine your project plan. The subsequent worksheets can assist with organizing and handling project tasks, managing your time effectively, and structuring meetings for concrete outcomes.

Use the tools that are most helpful to you. Refer to Section 4 for a more detailed discussion of management and leadership issues you may face. See Sections 6 through 8 for ways to sharpen your skills in public relations, fundraising, and evaluation.

### **Resources**

- For additional leadership and diversity tools, see AAUW's *Leader and Diversity Tool Kits*. To order either of these kits, contact AAUW's Sales Office at 800/225-9998, [www.aauw.org](http://www.aauw.org).
- For additional strategic planning information and tools, contact the Alliance for Non-Profit Management, 1899 L St. N.W., Suite 600, Washington, DC 20036, 202/955-8406, (fax) 202/955-8419, [www.allianceonline.org](http://www.allianceonline.org).
- For additional project management tools, contact the Management Assistance Program for Non-Profits, 2233 University Ave. W., Suite 360, St. Paul, MN 55114-1629, 651/647-1216, (fax) 651/647-1369, or see the program's library at [www.mapnp.org](http://www.mapnp.org).



## STRATEGIC PLANNING

The strategic planning process encourages long-range thinking, helping you focus on what you want to accomplish and how to accomplish it. The process allows you to outline goals and action steps for implementing your project and determine lines of responsibility and timelines to reach your goals.

Typically strategic plans have been written for three- to five-year intervals, with periodic review. Organizations often write one-year operating plans that outline specific goals and activities, which work in concert with longer-term strategic plans.

Use the tools in the next few pages to write your initial strategic plan. Work with team members and coalition partners to brainstorm goals and action strategies and to prioritize activities.

The following exercises have been excerpted with permission from *Applied Strategic Planning* by Judy Kent, Kent Consulting, 226 Bruyere St., Ottawa, Ontario K1N 5E3, Canada.

# EXERCISE I—DEVELOPING A GOAL STATEMENT

Use this exercise to develop goal statements for your project. Let's say, for example, that you want to emphasize three main areas: 1) improving girls' computer science skills; 2) encouraging girls to research various computer science career applications; and 3) introducing girls to women computer science professionals who can serve as role models. Repeat this exercise for each area of emphasis.

Area of emphasis \_\_\_\_\_

1. Where are we now? (current status) \_\_\_\_\_

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2. Where do we want to be? (vision) \_\_\_\_\_

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3. Gap analysis (difference between current status and vision) \_\_\_\_\_

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4. Goal statement (one broad statement of what we want to accomplish to bridge the gap between current status and vision) \_\_\_\_\_

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## EXERCISE II—SETTING GOALS

This exercise is a slightly different approach to goal setting. For each area of emphasis, think about what is working well, what needs to be improved, and how to get there. The second part of Exercise II allows you to refine your project goals.

Area of emphasis \_\_\_\_\_

### **Task 1**

1. What is going well in this area? \_\_\_\_\_

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2. What do we need to improve? \_\_\_\_\_

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3. In four years, what would we like to see happening in this area? (Dream a little.) \_\_\_\_\_

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4. To improve this area, what are our priorities for action? (Note: Action includes starting, maintaining, and deleting initiatives.) \_\_\_\_\_

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## Task 2

Review all the priorities for action in Task 1. Select the most important priorities and turn these into goal statements (i.e., something you want to accomplish).

Goal 1:

To \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Goal 2:

To \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Goal 3:

To \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Goal 4:

To \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Goal 5:

To \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## EXERCISE III—LINKING GOALS AND ACTION PLANS

As your project goals and action strategies emerge, this exercise can help you prioritize what you plan to do and when.

1. Strategic area of emphasis \_\_\_\_\_

Goal \_\_\_\_\_

2. Strategies and initiatives to realize the goal

<b>Strategy/Initiative</b>	<b>Priority</b> H (high) M (medium) L (low)	<b>Timeframe</b> ST (short term) MT (medium term) LT (long term)

## EXERCISE IV—PLANNING ACTION STEPS

This exercise will help you map out your action strategies in more detail. Use it in your initial planning process and refer to it as your project unfolds. It may also prove useful in handling unexpected contingencies—potential obstacles or new opportunities.

Fill in the chart with the following action planning components:

### 1. Activities

Determine the activities that must be done to meet each goal.

### 2. Tasks

Break down each activity into small manageable tasks.

### 3. Responsibilities

Assign responsibility for each activity to the most appropriate individual or group. This individual or group can then assign responsibilities for the various tasks to others.

### 4. Timelines

Establish timelines for the start and completion of each task and the activities. Be realistic with the timelines and allow some flexibility for unexpected events.

### 5. Resources

Assign the resources necessary to complete the activities and tasks. Resources assigned include both human and financial.

# ACTION PLANNING CHART

Area of emphasis \_\_\_\_\_

Goal \_\_\_\_\_

Activities (what)	Tasks (how)	Responsibilities (who)	Timelines (when)	Resources (with what)

## EXERCISE V—SETTING PRIORITIES

The following ways of setting priorities are designed to help further refine your plan. Try both versions: Each involves a slightly different approach to priority setting.

### Version 1—Setting Priorities

Rank activities on a variety of criteria, including degree of contribution to the mission of the organization, long-term impact, cost in dollars, and cost in time and effort of people. This process ensures that the financial and human resources are applied to areas of greatest need and the activities from which the organization will most benefit.

A classification used by some organizations determines which activities are nondiscretionary and which are discretionary. Nondiscretionary activities must be completed or undertaken. Discretionary activities could be deferred or cancelled if resources are not available. Rank discretionary activities in order of priority so that it is clear which activities are most important. As resources become available, activities may be implemented in order of priority.

Activity	Discretionary/Nondiscretionary	Resources (human/financial)	Rank

### **Version 2—Setting Priorities**

Another way of determining priorities is to rank activities in three categories: must do, should do, and could do. Again, the activities need to be assigned a cost, but the ranking assists in making decisions for action.

Activity	Must Do	Should Do	Could Do

## EXERCISE VI—PUTTING IT ALL TOGETHER

Now that you have brainstormed goals, determined action strategies, and decided on priorities for action, it's time to compile your strategic plan. Plans come in a variety of formats. You might simply combine your action planning charts (refer to exercise IV) for each area of emphasis. Or develop your own format. In any case, the following checklist can help you mold your plan and determine whether it will be effective.

### Checklist

Answer the following questions “Yes” or “No” by placing a check in the appropriate column. An effective plan answers “yes” to all 10 questions.

Criteria	Yes	No
1. Is the plan consistent with the values, vision, and mission of the organization?  2. Are the timelines in the plan realistic and spread over the full term of the plan?  3. Does the group have the financial resources necessary to carry out the plan?  4. Does the group have the human resources needed to carry out the plan?  5. Is the workload realistic for various individuals and groups?  6. Are the activities and tasks listed in order of priority, with the most important, not the most urgent, ranked first?  7. Are the tasks manageable and clearly defined?  8. Is the plan feasible and flexible, with some contingencies for the unexpected?  9. Are the people involved knowledgeable about and committed to the plan?  10. Will the plan lead the group toward the accomplishment of goals and the group's vision?		

# TASK MANAGEMENT CHART

Use this chart as a complement to your strategic plan to define short-term tasks and track the steps to completion. Although you may not complete a weekly management chart, aim to develop a schedule of regular monitoring. Keep a careful record of indicators of success. The items noted in the column “Next Steps Needed” are carried over to tasks for the following week.

Week beginning \_\_\_\_\_ Week ending \_\_\_\_\_  
 Person responsible \_\_\_\_\_

Task/Objective	Steps Taken/Date	Next Steps Needed	Indicators of Success



## TIME MANAGEMENT CHECKLIST

To help you and your project team assess and efficiently manage your time, review the following list of suggestions. Write “1” next to the activities you currently practice. Then go back and write “2” next to those that you try to do. After completing the exercise, ask what you need to do differently. Use this tool periodically to continue to improve your time management skills. It was adapted with permission from Patricia A. Bull Associates, Glenmont, New York, in AAUW’s *Volunteer Leadership Training (VoLT) Level I Training Manual*, 1988.

1. Clarify your goals and put them in writing.
2. Develop measurable objectives and put them in writing.
3. Set priorities from your lists of goals and objectives.
4. Analyze everything you do in terms of your goals and objectives. Ask yourself what would happen if you did not complete a specific task. If the answer is nothing, stop doing it.
5. Keep a time log to analyze how you and your group use time.
6. Eliminate at least one time-waster from your work each month.
7. Make a to-do list at the beginning or end of each week. Prioritize your to-do list in terms of goals, objectives, and projected time for tasks.
8. Set time limits for every task you undertake.
9. Leave room in your schedule for the unexpected.
10. Take the time to do the job right the first time.
11. Eliminate recurring crises. Find out why things go wrong and learn to prevent crises instead of reacting to them.
12. Develop the habit of finishing what you start. Don’t jump from one activity to another, leaving a string of unfinished business behind you.
13. Keep handy needed information, such as phone numbers of the team members and coalition partners.
14. Reward yourself for time well spent.

## MEETING PLANNER

Meetings are unavoidable. To carry out a successful project, you must meet often with members of the project team and coalition as well as with other groups and people you seek to influence. Meetings may be formal, informal, even impromptu. To keep the work on track, even the most informal meetings should be planned and the objectives made clear to participants. Use the following checklist to get the most out of your meetings.

Before the  
Meeting

### **Prepare the Agenda**

Your goals and objectives for the meeting form the basis for the agenda. A meeting without a purpose will frustrate participants and undermine their faith in your leadership. Conversely, setting and then meeting stated objectives will leave all involved with a sense of focus and accomplishment.

- Start by clarifying in your own mind the purpose and goals of the meeting. Examples of goals follow:
  - Establish consensus on a given issue.
  - Gain new partners for the project.
  - Obtain feedback on a proposed strategy or timeline.
- If a goal is broad or cannot be reached in the time allotted for the meeting, spell out smaller concrete objectives that are more manageable. Objectives should be clear and feasible, with measurable outcomes. To accomplish this:
  - Set realistic time limits, for example 20 minutes for brainstorming in small groups.
  - Break down the goal into clear, progressive steps.
  - Break down the goal into components such as ensuring a diversity component and gaining teacher buy-in.

These goals and objectives, along with other items of business, form the basis for your agenda. Remember, agenda items should indicate actions or decisions needed. “Finalize Project Timeline” gives much more direction than “Discuss Timeline.”

- Estimate the time required for each agenda item and assign times. Assign “9:40-9:55” rather than “15 minutes.” This will help keep the meeting on track.
- Write names of people responsible for each item on the agenda.
- Review the minutes of the previous meeting for any unfinished business.
- Issue personal invitations to the meeting.

## Conducting the Meeting

- Disseminate the written agenda, preferably at least a week before the meeting. Include the date, time, and location of the meeting on the written agenda. Solicit feedback on the proposed agenda items and additional agenda items.
- Update the agenda based on the feedback you receive, and disseminate it at the meeting.

### **Getting Started**

- Arrive early. Start on time. Don't penalize those who are prompt by waiting for those who are late.
- Bring extra copies of materials, including the agenda, for visitors and for participants who never received the materials or failed to bring them.
- Appoint a recorder to take minutes and to accurately note all agreements and decisions reached.

### **Running the Meeting**

- Open by stating the purpose of the meeting.
- Make sure all participants know each other's names, affiliations, and interests in the meeting subject.
- Ask participants to sign an attendance list for future use.
- Follow your written agenda. Give participants the chance to modify it when the meeting starts, but once an agenda is agreed upon, stick to it. This means enforcing time limits and firmly cutting off digressions.
- Strive to make decisions rather than deferring or avoiding controversial items.
- Summarize frequently, especially to conclude an agenda item or to stop one person from dominating the discussion.
- Mediate. You can help balance opposing viewpoints by recognizing one opinion and asking for others: "I see what you're saying, Jane. Does anyone have a different approach to suggest?" The most informed decisions will result from consideration of a variety of viewpoints.
- Try to involve all participants. Seek out opinions from those who have remained silent. You might do this by asking questions such as, "How might members of your organization respond to that suggestion?"

### **Conclusions and Action**

- At the end of the meeting, be sure that participants have reached a consensus.

Follow-up

- Summarize the group's conclusions, focusing on any future actions decided upon: "It is my understanding we have agreed that ... and in the next three weeks ... . Is that how all of you see it?"
- Clearly restate explicit assignments to be carried out by specific participants in preparation for the next meeting or some other stated and realistic deadline.
- Ask all participants how effective the meeting was. Try to get their reactions in writing. Plan future meetings that will avoid cited problems.
- Solicit ideas from the group for the agenda of the next meeting and for the meeting's time, date, and location.
- End on time.

**Promptly and Regularly Communicate With Meeting Participants and Other Stakeholders**

- Circulate minutes promptly—preferably within 48 hours—to all participants and to individuals who were unable to attend. Be sure minutes are action-oriented, with volunteers listed next to each assignment.
- Periodically check to see whether participants are carrying out their assignments. Call to ask if they need help, not if they are doing their jobs.
- Contact all participants personally to remind them about the next meeting.