Project Management

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How To Use This Project Management Tool

What You'll Learn

This tool will walk you through the steps of carrying out a project. It has tools you can use to plan a project, use SMART goals, delegate tasks, manage people, set deadlines, keep track of things, solve problems, get your project done, and evaluate your project.

How To Use The Tool

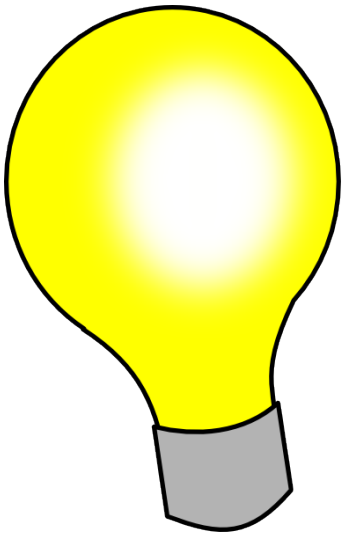
The first part of this tool is an overview of what managing a project is and what steps you need to take to manage your project are. After that, we'll give you more detailed information about each step in the process.

Maybe you've already started your project and want to skip some of the sections at the beginning. You can use this tool in whatever way works best for you.

Overview

Most self-advocacy organizations have projects as a part of their work. Sometimes these projects can be big, long-term projects, and sometimes they can be smaller, short-term projects. For example, the Pacific Alliance on Disability Self Advocacy is a big, long-term project of the Autistic Self Advocacy Network, and this resource guide is a small project of PADSA. No matter how big or small they are, all projects are important, but sometimes they can be challenging. This resource guide is here to help self-advocacy organizations manage their projects.

Tips



- The first step to a project is planning. During the planning stage you need to decide what needs to get done and how it's going to get done.
- All projects are important and are worth evaluating.
- When assigning deadlines for tasks, make sure they are realistic for the project and for your team.
- It's important to keep records of who is working on the project and what their responsibilities are.
- When you have a task that needs to get done, and you are not able to do it yourself. It's important to delegate it to someone else. You should ask yourself "What needs to get done? Who has the skills to do it?"

Project Management Flowchart

These are the steps that you will generally follow when managing a project. On the following pages, we'll explain the items in this chart in more detail.

PHASE 1: PLANNING

- SMART goals
- Delegation
- Personnel
- Organization
- Deadlines
- Other preparation/groundwork

PHASE 2: IMPLEMENTING

- Keeping track of things
- Checking in
- Group communication
- Anticipating problems & making backup plans
- Problem-solving
- BREATHE
- Frame switching
- Holding people accountable
- Paying attention to little details

PHASE 3: FINISH

- Complete project
- Do an evaluation

SMART Goals

SMART goals are:

Specific (What is it exactly that we want to get done?)
Measurable (How can we see that this is getting done?)
Achievable (Can we get this done when we want it to get done?)
Realistic (Do we have the ability to get this done?)
Timely (Can we get this done within a reasonable amount of time?)

SMART Goals Template

1. Goal
- **a.** Action step
- **b.** Action step
- **c.** Action step

2. Goal
- **a.** Action step
- **b.** Action step
- **c.** Action step

3. Goal
- **a.** Action step
- **b.** Action step
- **c.** Action step

The following pages contain forms to help you organize each step of managing your project.

Forms

Delegation

When you have a task that needs to get done, and you are not able to do it yourself, it's important to delegate it to someone else. You should ask yourself, "What needs to get done? Who has the skills to do it?"

What Needs to Get Done	Who Has the Skills to Do It

Personnel

You can keep a table like this to keep track of your team.

Name	Role	Responsibilities

Deadlines

You can keep track of deadlines by using this table.

Task	Deadline

Problem Solving

You can use this form to plan for potential problems and how your team will solve them.

Action Step/Goal	What Could Go Wrong?	What Can We Do About It?

Evaluation

You can use this form to evaluate your projects.

Project	What Went Well	What Needs Improvement

Work Plan for Grants

When your organization gets a grant, the organization that gave you the grant will want regular reports of your progress for the grant. You can use this template to plan your project.

Name of Organization	Project Lead

Description of Project
Overall Goal of Project

Work Plan for Grants

Goal 1

Steps	People Responsible	Deadline

Goal 2

Steps	People Responsible	Deadline

Work Plan for Grants

Goal 3

Steps	People Responsible	Deadline

Additional Comments

Budget

Item	Cost
Total	

Resourcees for Managing Projects

Managing a project is a lot of work. Some people use white boards, bulletin boards, agenda books, or other physical objects to stay organized and keep track of details.

These online resources are also a good option:

- **Google apps:** Google accounts comes with a bunch of free apps, including **Drive**, which creates, organizes, and shares documents, and **Calendar**. You can make a to-do list, share a folder of project information, or invite everyone to a meeting at once.

Organize anything, together

- **Trello:** **Trello** is an online cork board with virtual index cards you can arrange and share. You can make different boards for different projects, and add different people to different cards.

- **Pinterest:** **Pinterest** is similar to Trello, but it uses pictures.

- **Fleep:** **Fleep** is a messaging service that fills the gap between email and various IM/texting services. It is a good service for team chats, keeping track of files you send back and forth with your team, and organizing chats into different conversations.

- **Conceptboard:** **Conceptboard** is an online whiteboard that you can use to visually collaborate on project ideas.