



Welcome to

Using Project Management Techniques in Your VISTA Assignment



Today's Speakers



Erin Barnhart, Ph.D.
Effective Altruism, LLC



Bethany Dusablou
Education Northwest

Guest Speakers



Dakota Riehl
Bethany Christian Services

Session Goals

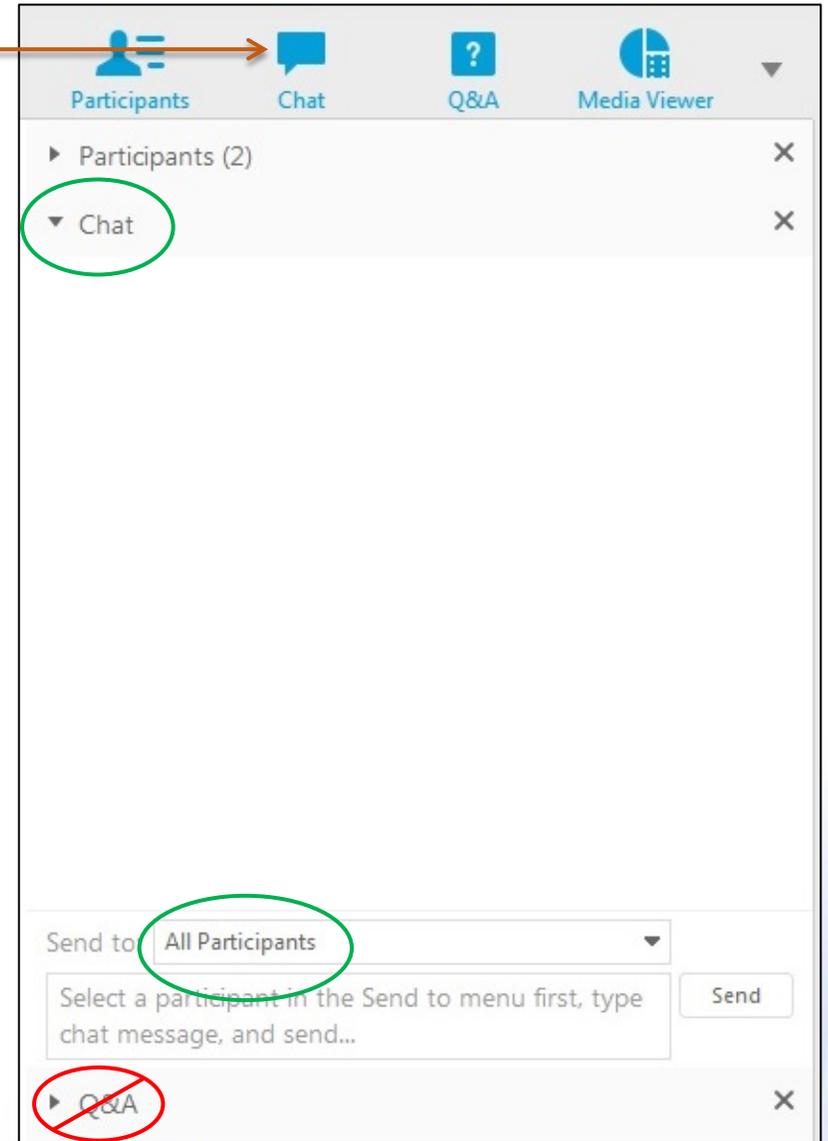
By the end of the webinar, you will be able to:

- Identify key terminology, phases and tools of a traditional project management model
- Access project management tools, resources and websites
- Apply project management techniques to your VISTA activities

Chat Question

- What are some examples of short-term or long-term projects that you currently or will soon oversee at your VISTA site?

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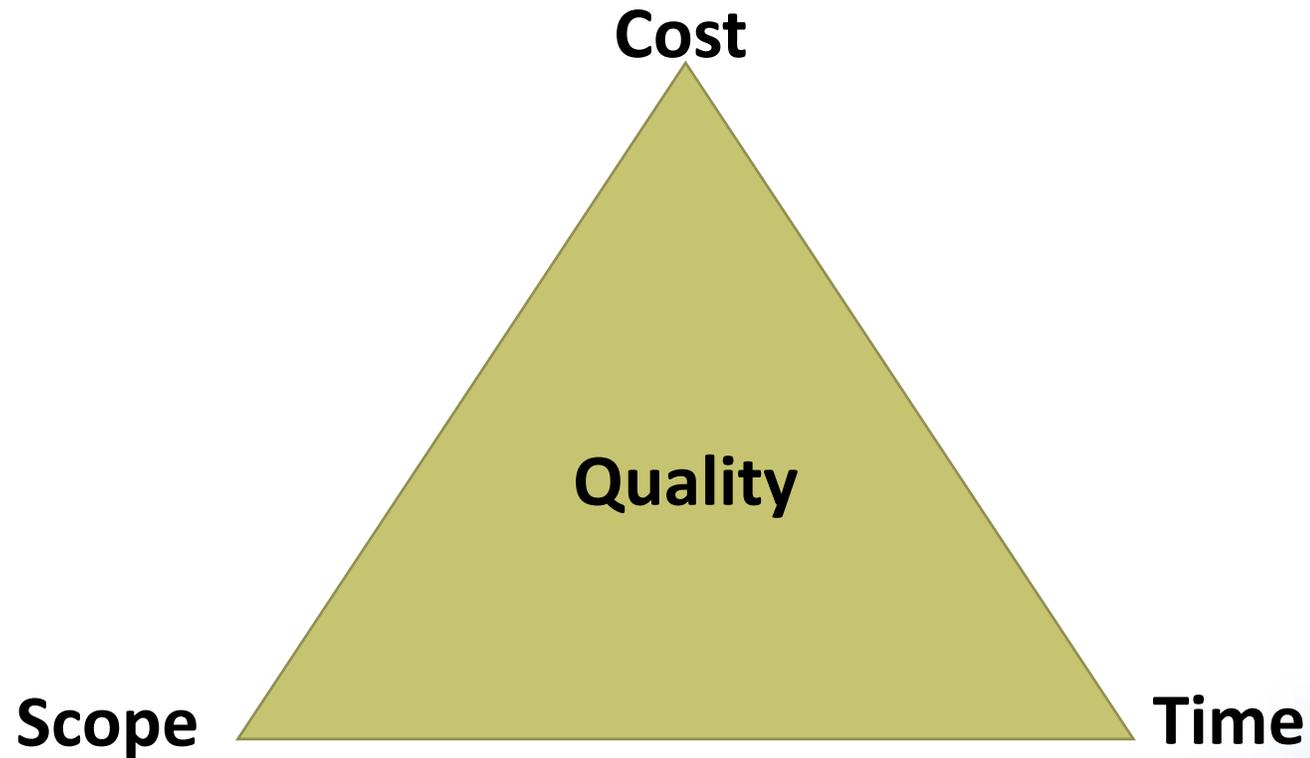


Project Management

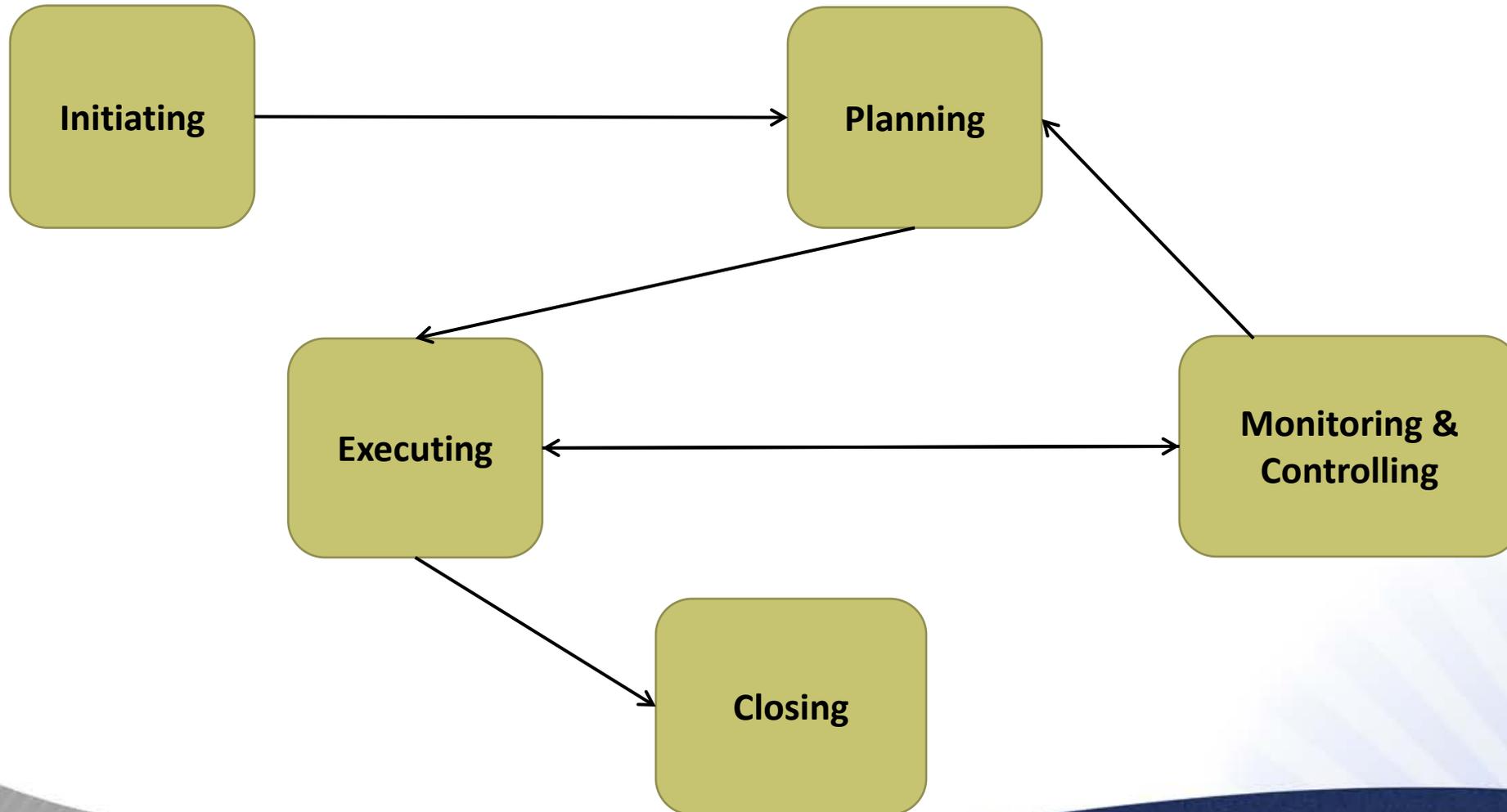


- Tools, systems, and practices to facilitate a project from start to finish
- Multiple models
- Common components:
 - Goals and Vision
 - Timeline
 - People and Resources

The Triple Constraint



Project Management Phases



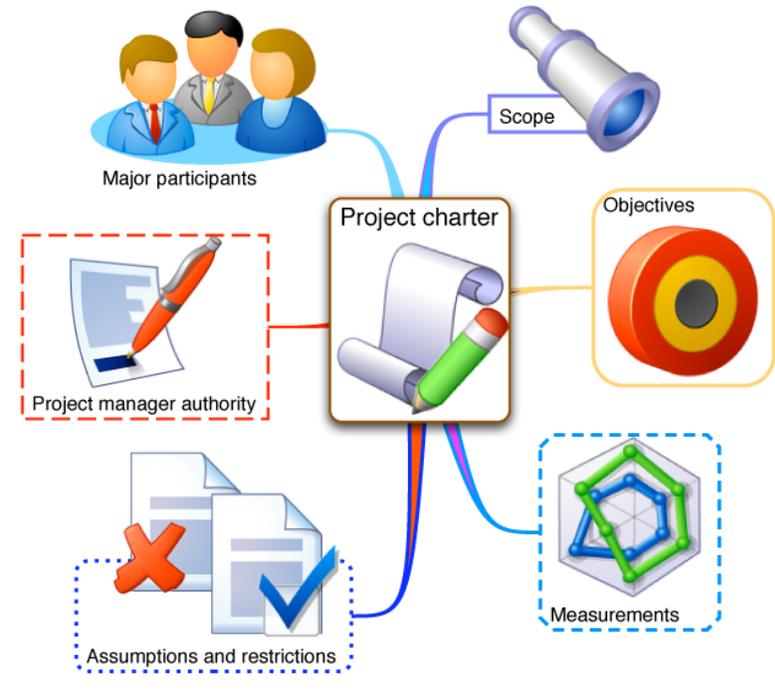
Initiating

- What are the parameters of your project?
- What are the goals and vision?
- What resources do you need?
- What resources do you have?
 - Staff, volunteers, partners
 - Money, assets, tools



Initiating: Tools and Activities

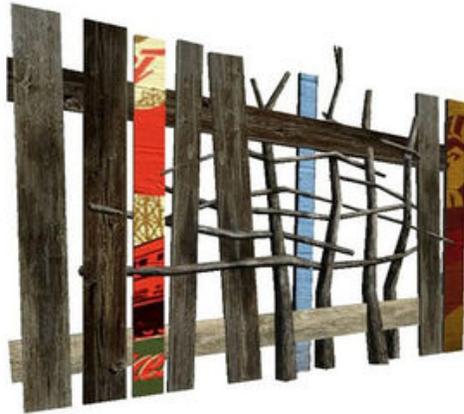
- Stakeholder Analysis
- Project Charter
 - Acknowledges the existence of a project
- Scope Statement
 - Defines the major objectives and what the project delivers



Project Charter vs. Scope Statement

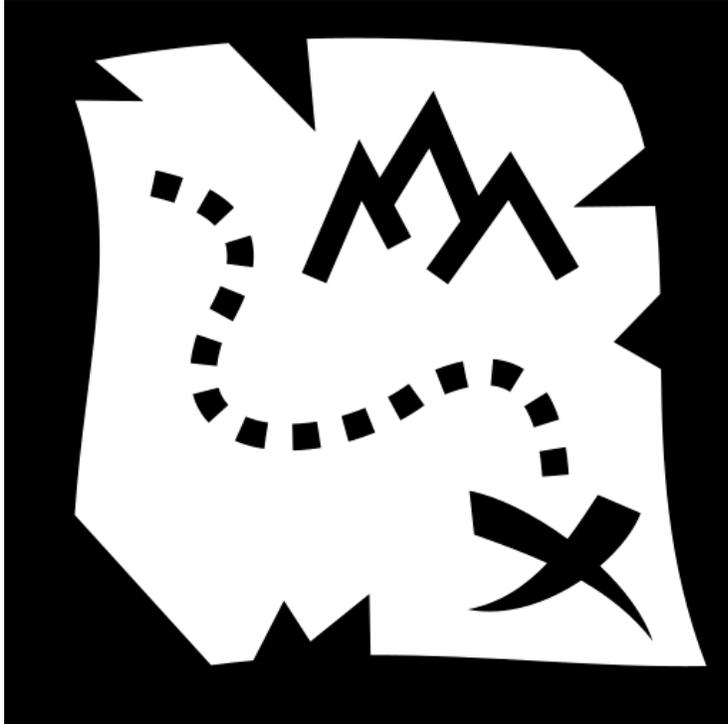
Project Charter	Project Scope Statement
<ul style="list-style-type: none">• Project purpose or justification• High-level requirements and project description• Summarizes schedule, budget• Project approval requirements• Authority & Approval	<ul style="list-style-type: none">• Product scope description• Project deliverables• Project boundaries• Project constraints• Project assumptions

Case Study: Building a fence



- Description and Justification
 - A 20 x 20 foot wooden fence to keep the dog in the yard
- Requirements
 - Posts every 6 ft, 6ft tall wooden boards, supplies and tools needed
- Objectives
 - Yard is completely enclosed on all four sides, with door out to front yard on side of house.
- Constraints
 - Complete by Summer break (June 15) and within \$1000 budget. Shared fence line with 3 neighbors. Must be built on legal property line.
- Assumptions
 - 6 foot tall fence will be tall enough that Fido can't jump out.

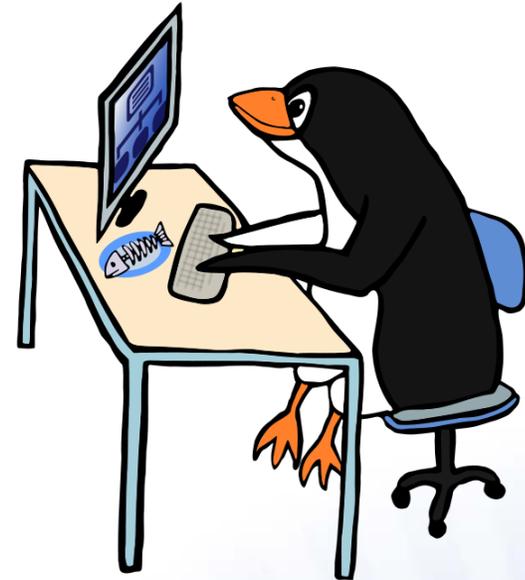
Planning



- Make a plan for completing tasks
 - Craft specific timeline
 - Identify your team
 - Identify your tasks and deliverables
 - Identify your risks
 - Create a budget

Planning continued

- Make your plan for completing tasks
 - Assign dates to deliverables
 - Assign tasks to team
 - Develop the schedule
 - Create tools to track progress
 - Get approval to get started!

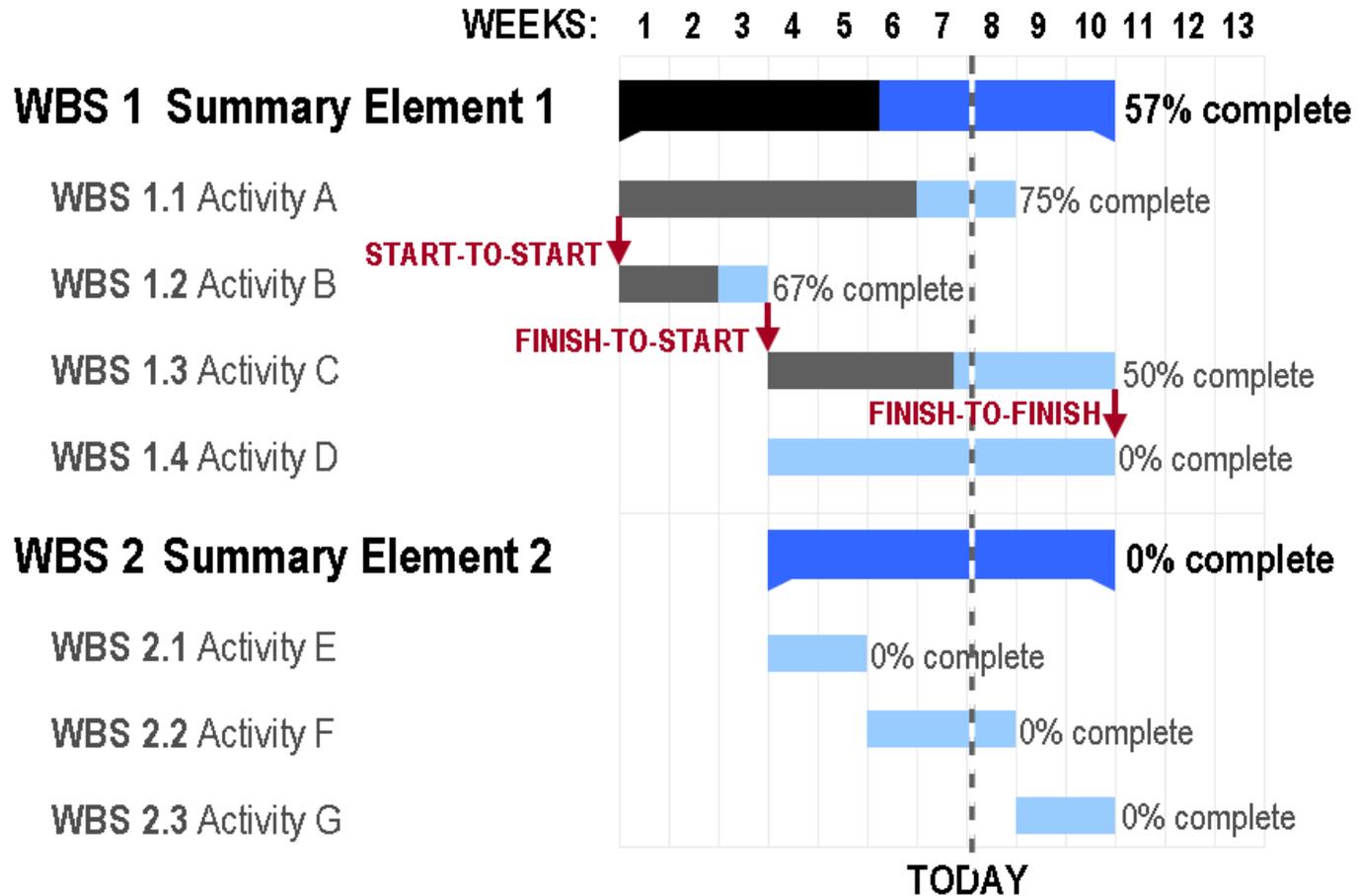


Planning: Tools



- Mindmapping
- Risk Analysis
- Gantt Chart

Gantt Chart



Case Study: Fence Risk Analysis

Identified Project Risk:	Probability	Impact
Difficulty reaching agreement on fence with neighbors	2	5
Description of Identified Risk:		
With several neighbors sharing a fence line, getting agreement from all of them on size, materials, yard access etc.		
Risk Response		
Discuss with all parties, gain agreement before starting		
Identified Project Risk:	Probability	Impact
Someone will get hurt building the fence.	2	5
Description of Identified Risk:		
Someone could hurt themselves falling off a ladder or pounding nails, lifting heavy materials, or other injuries related to labor.		
Risk Response		
Create safety plan or hire someone to build the fence who has insurance		

Executing



- All systems go!
 - Use your timeline and tools to complete tasks

Monitoring and Controlling

- Monitor and respond to changes
 - Timeline, budget, partners, etc.
- Assess and address risks
- Communicate with partners
 - Supervisor, stakeholders, etc.
- Evaluate results
 - Are you on track to meet your goals?



Executing and Monitoring: Tools



- Communication Plan
 - Living document & customizable
- Status Meetings
 - Problem solving, decisions, brainstorming, info sharing
- Weekly Planning

Case Study: Communication Plan

Communication Requirements			Communications Planning		
Internal Stakeholders	Role	What?	When?	How?	Contact info/other
Spouse	Co-Decider, shares some roles in process, money	Costs, property line issues, construction work, material selection	At least 2 times a week and more frequently during construction	In person/email/text	home
Neighbor 1	Adjacent Property owner, some decision making	Property line assessment, pay part of cost, access to property, timeline delays	At major milestones, ongoing weekly and in cases of delay	Email (in writing) and call for urgent issues	Neighbor1@gmail.com 555-555-5555

Closing



- Wrapping things up
 - Evaluate results -and- process
 - Determine lessons learned
 - Report to supervisor and partners
 - Create file system
 - Plan for sustainability

Closing: Tools and Activities

- Lessons Learned
- Closure Checklist
- Team Acknowledgement



Guest Speaker: Dakota Reihl

GRAND RAPIDS
**CENTER FOR COMMUNITY
TRANSFORMATION**



The Project

- Capacity Building for a social enterprise initiative – Rising Grinds Café – with Bethany Christian Services' Grand Rapids Center for Community Transformation.
- Project started in May 2015 and we are set to officially open in the Spring of 2017



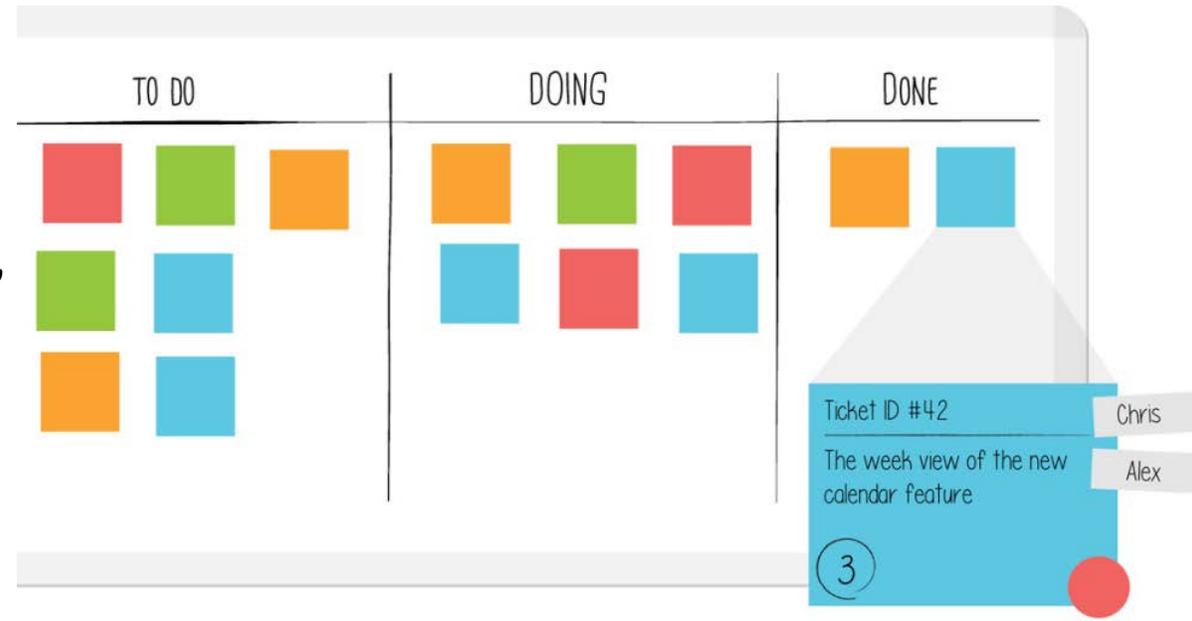
Importance of Implementation



- Finding our stakeholders – “community-driven” for a reason
 - Listen to community
- Knowing when to step it up
- Different tools for different audiences

Coming Back Around

- Balancing the relationship between executing, monitoring, and planning.
- Kanban Boards as tool for accountability, monitoring, and controlling
- Staying true to VISTA Capacity Building



A Few Things to Keep in Mind...

- Communicate regularly
 - Talk to your supervisor – before you get started, at regular intervals as you go, when you finish
 - Seek agreement on timeline, budget, deliverables, etc.
 - Talk to others who have done similar projects
- Always build in extra time!



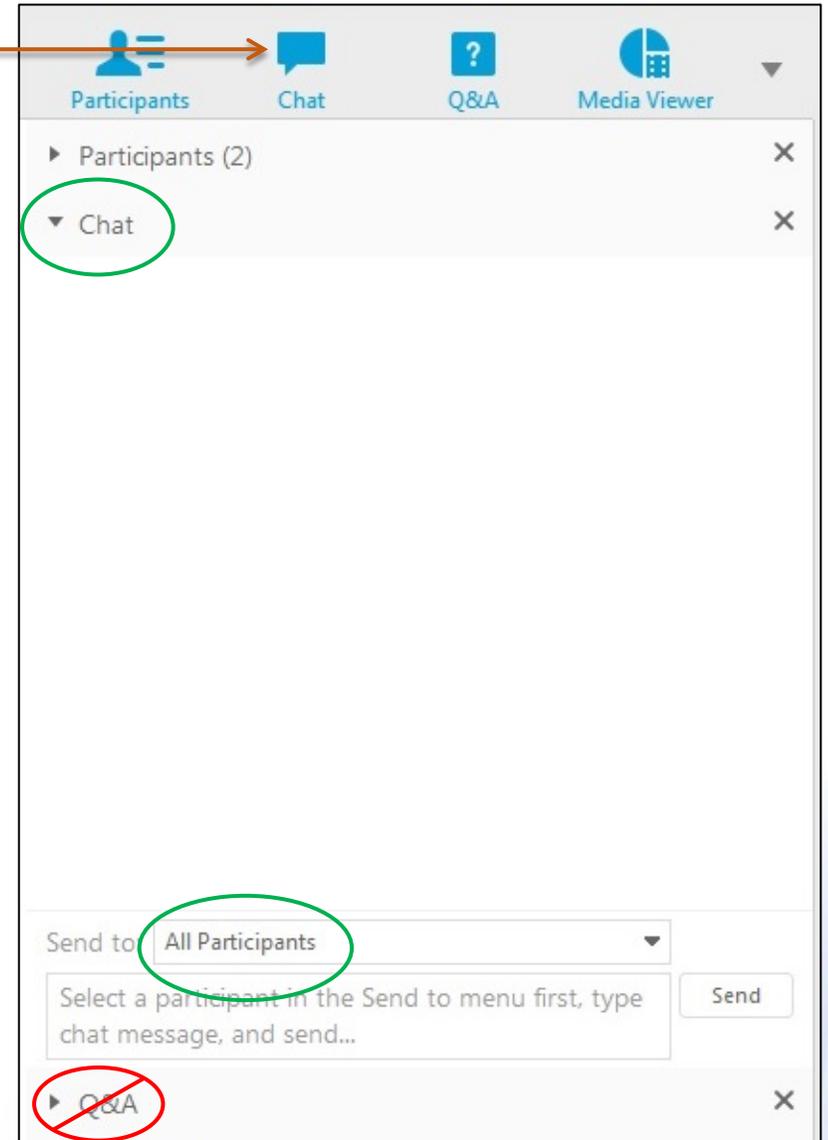
Tailoring Project Management for VISTA Service

- Long-Term Projects
 - Fundraising and resource development
 - Building a volunteer program
 - Leading an outreach effort
- Short-Term Projects
 - Planning an event
 - Designing a website
 - Writing a grant proposal

Chat Question

- What tools or techniques do you currently use to manage projects?

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the chat panel.



Web-based Project Management

asana:

Q Search

ASANA

- My Tasks
- Inbox
- Dashboard
- Design Weekly Meeting
- Design Goals Q3
- Design Resources
- iPhone App Design
- Inspiration
- Interesting Articles
- Designer Candidates
- Kat/Connor 1:1
- Q3 Recruiting Goals
- Blog Post Roadmap
- Show Recents and more...

ENGINEERING

- Team Calendar
- PROJECTS
- Software Engineer Candidates
- Bug Tracking
- Eng Milestones
- Launch Pipeline
- Product Roadmap

My Dashboard

Website Launch

Congrats on the launch, everyone!
Sarah Rudder • Today at 1:49pm • Kasey H and Justin K

Date	Completed	Remaining
Oct 1	6	298

Q3 Marketing

Emily Kramer • Sep 25 at 3:28pm

Date	Completed	Remaining
August 2	55	104
Sep 26	47	118

Q3 Blog Calendar

Published "What Jefferson can teach you about teamwork" on Monday.
On deck: Dashboards announcement blog post
Kasey Fleisher Hickey • Today at 1:55pm

Date	Completed	Remaining
Oct 1	30	235

Design Requests

We will prioritize new requests this week
Jim Renaud • Today at 1:59pm

Completed	Remaining
17	40

Bug Tracking

Thanks to Alex for triaging 10 bugs!
Reigan Combs • Yesterday at 12:23pm

Completed	Remaining
75	150

+ Add Project Summary

Placeholder for a project summary card.

Google Docs

Components/Task	Dependent Components	Status	Date Start	Date Complete	Owner	Difficulty	Notes
<title of your project>							
Task 1		open	4-Jan-2008		Jennifer	Small	Use the status to toggle between different states with color coding.
Task 2		code complete	1-Jan-2008	2/3/2008	Rich	Small	
Task 3		open			Mike	Medium	
Task 4		open	1-Jan-2008	1/31/2008	Jason	Large	
Task 5 Integrate		open	1/23/2008		Petar		
Monetize		open			Sandy		
-> FIRST GOAL 1 - Write down a goal; e.g. roll-out of functionality (dependent on the above tasks/stories getting done) March 30							
Component A		open			Arjun	Small	Do some sort of grouping if needed between tasks and component.
	Task A	open			Shiela	Medium	A good example might be in a software project where you are trying to accomplish code completion of A and it depends on a number of sub tasks.
	Task B	open			Jeff		
	Task C	open			Shawn	Medium	

Resources

Overall

- Wikipedia
 - https://en.wikipedia.org/wiki/Project_management
- The Project Management Institute
 - <https://www.pmi.org/learning>
- Project Management Hacks
 - <http://projectmanagementhacks.com/project-manager-training-51-resources/>

Tools and Templates Mentioned

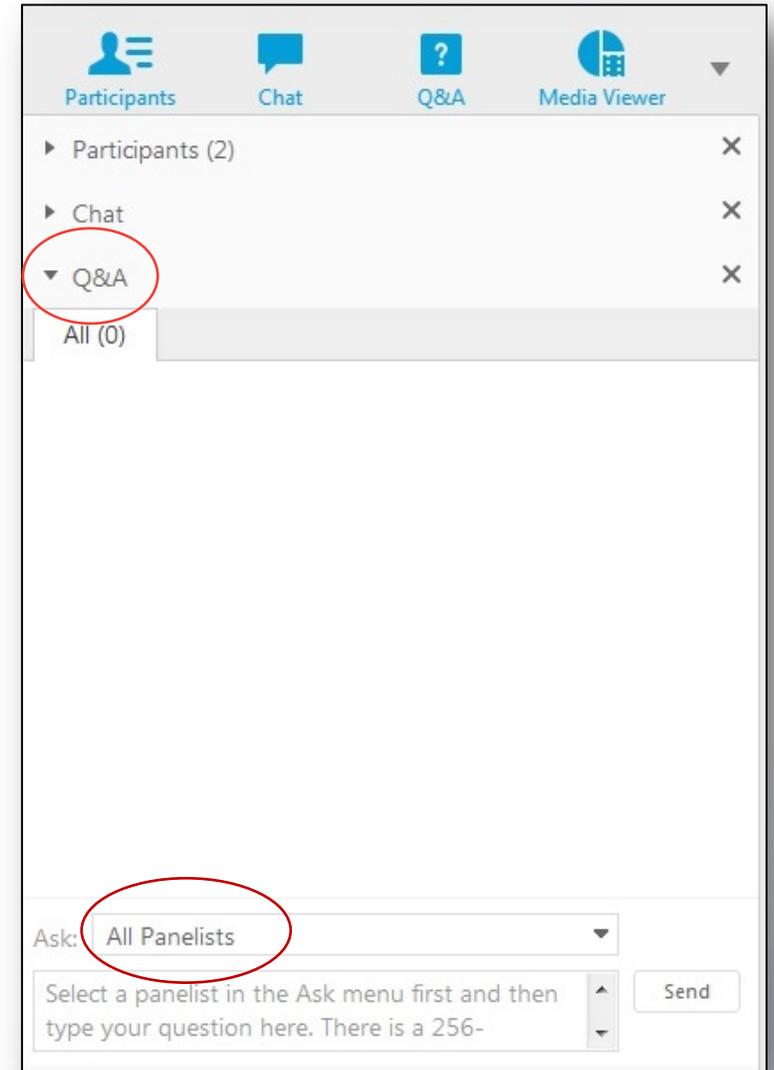
- Corporate Education Group tools:
<http://www.corpedgroup.com/resources/pm-tools.asp>
- Trello.com
- Kanban Boards
- Asana.com
- Google Docs

Evaluation

- Please take a few moments to share your feedback through the quick poll on the right side of the screen.
- How can we improve these sessions? What topics should we include in future webinars?
- Thank you very much for your time and participation!

Questions ?

- To ask a question verbally, call in using the number on this slide and press *1
- To ask a question electronically, use the Q&A feature located in the bottom right corner of the screen. Please ask “All Panelists”



Thank You for Your Participation!

If you have further questions or for more information, contact us: VISTAwebinars@cns.gov and visit the Webinars for VISTAs page on the VISTA Campus for a complete schedule of VISTA webinars

**Our next webinar:
Managing Student Loans**

September 8
2:00pm Eastern

**Special Event SAVE THE DATE:
AmeriCorps VISTA Federal Jobs Expo**

October 25
Washington, DC