

Project Management Workbook



© 2015 by David Postic

There is no restriction on the use of the material for the purposes of training or administration within Rotaract or Rotary clubs. Should the reader wish to use this material for any other purpose, please contact the author. This copyright statement should not be removed.



Foreword

This workbook is a basic guide for project planning. It is not intended to serve as a comprehensive checklist or as a one-size-fits-all blueprint for perfect projects. It is meant simply to help the reader think through all of the details and contingencies that go along with planning any project. Quite often, of course, there will be unexpected problems not covered in this or any other workbook. Therefore, it is important for the reader to supplement the advice herein with the advice and guidance of his fellow Rotaractors and Rotarians. But nothing teaches as well as experience. So go get some, and enjoy the ride.

David Postic
District 5770
United States

Step One: The Basics

Every project begins with an idea—a vision of what the final product will look like. You want your project to do something, or else you wouldn't be planning it. What do you want to do? In a very general sense, what do you want it to accomplish? What would success look like to you? Give some thought to the following questions:

1. Describe your project in 1-2 sentences. (Ex: Put on a rock concert to raise money for purchasing polio vaccines.)

2. What are your goals for this project? (Ex: Raise \$5,000, sell 500 tickets, get good publicity for the club, engage a lot of members.)


3. What would failure look like? Put another way, what is the minimum acceptable outcome for this project? (Ex: Losing money.)

4. What do you want to call this project? (Ex: The Polio Pow-wow.)

Step Two: The Specifics

Now that you know what the final product looks like, it is time to start getting specific. What all do you need to do to make this project work? Who do you need to help you? What're your constraints? How much time do you need? Address the following topics:

5. List all the activities that will need to be completed in order to make this event successful according to the criteria you listed above. (Ex: Set date and time, reserve location, identify bands.)



6. Now, in the same box above, number those activities in chronological order, with 1 as the first task you'll need to do.
7. Now estimate how long you think each task will take to accomplish. Keep in mind that, for some tasks, you can only go as fast as it takes people to respond to your communications.
8. Now connect related activities with lines. (Ex: Reserving a venue and paying for that reservation.)

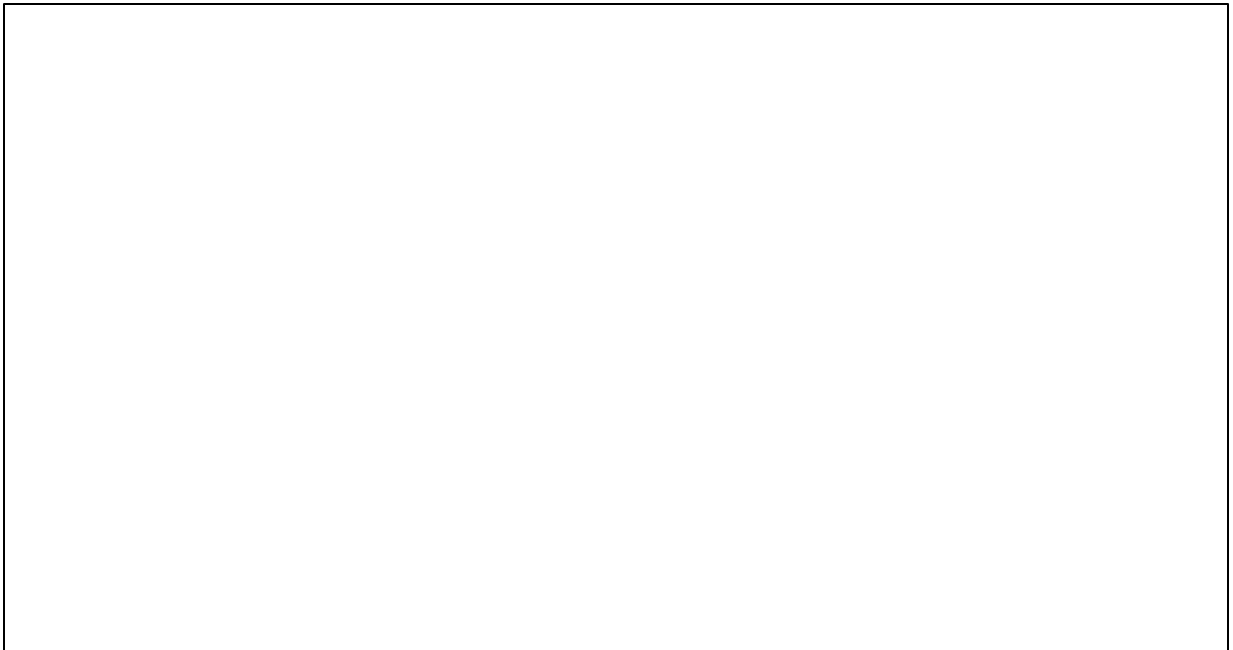
Before you go any further, you will need to get some team members to help with the project. Using the activities you listed above, divide up the responsibilities into different categories or clusters. For example, you might cluster all the activities having to do with the band (identifying bands, scheduling, equipment, set-up).



9. Now go through those clusters and create however many positions you think you need to execute this project. Keep in mind that each position should have enough responsibilities to keep team members busy and engaged, but not too busy that the job is too difficult.
10. Select team members to fill those positions.

Once you have selected your team members and assigned them their tasks, you need to make sure that they all have a thorough understanding of what their role is and what is expected of them. Meet with your team and brainstorm, asking questions such as:

11. In your own words, describe your position. What are your duties?
12. What goals do you have? What would make this a successful event?
13. Aside from what you've already been told, are there any additional tasks or duties that you think need to be done?
14. Create a detailed timeline for completing your activities.
15. Create a list of contacts you may need for fulfilling your role.
16. Develop group expectations. (Ex: Respond to emails, texts, and calls in a timely manner; always be honest about your progress; ask for help when you need it.)



Depending on the size of your event, these questions and activities might be best discussed at some sort of retreat or meeting once you select your team. Take at least an hour or two to meet with your team (*ALL* of your team) for planning and teambuilding.

Now it's time to get more specific. You need to decide on the particulars of your event (date, time, location), as well as develop a timeline for everything you need to do between now and the date of the event. Break everything down into its smallest task and be conservative in your estimates of how long things will take.

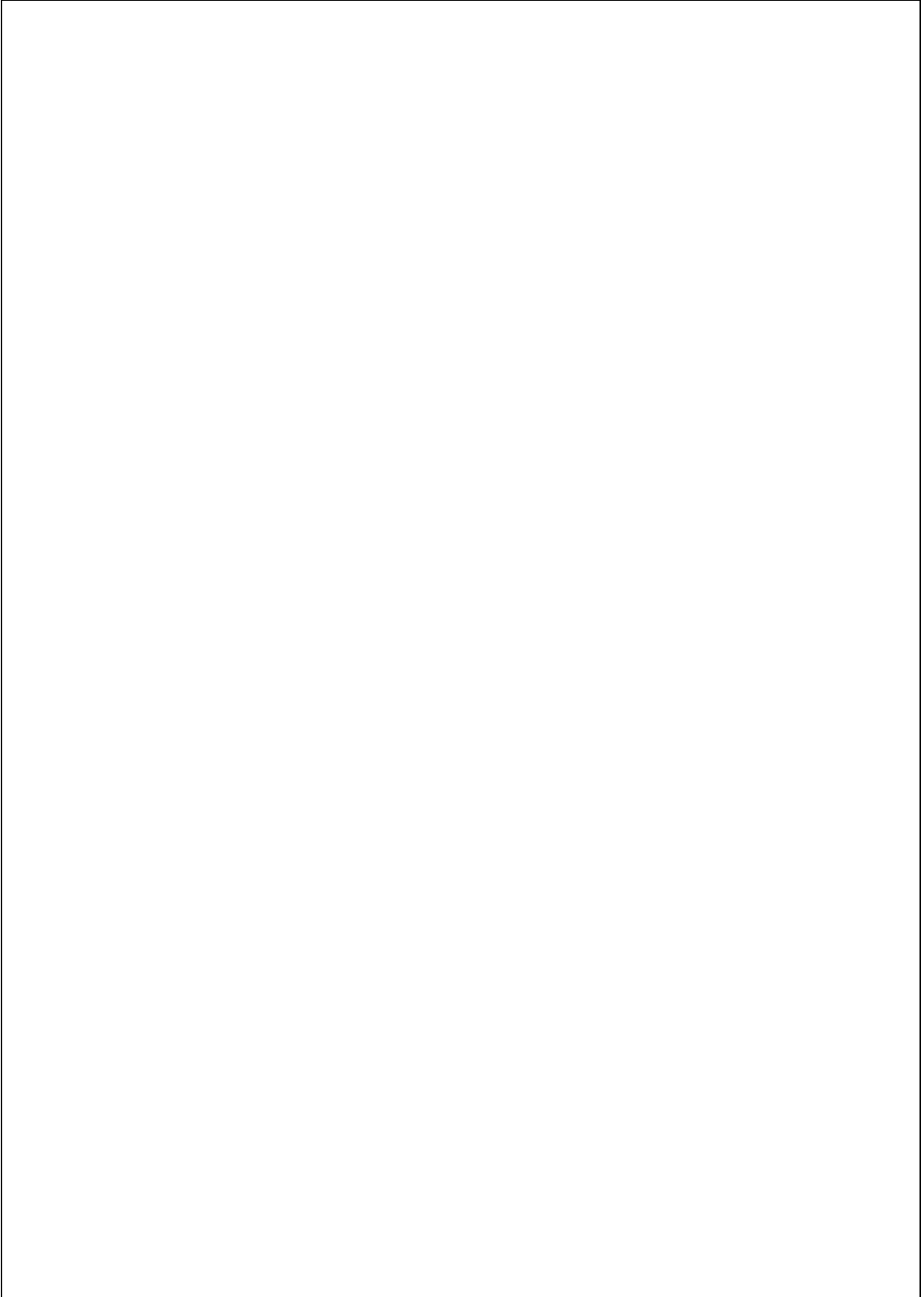
17. What will be the date and time for the event? If this event requires student participation, you should check relevant university websites to find the best possible date and time so that the most students can attend. Also check with the board to make sure the club does not have any other activities going on. List your top 3 dates and times below:

18. Where do you want your event to be held? What is the venue?

19. Now you need to create two schedules for your event. One schedule includes everything you need to do *leading up* to the event. The other includes everything you need to do the *day of* (or *week of*) the event. Several tips for creating these timelines:

- Work backwards from the event. You have already estimated how long each activity will take, as well as the chronological order of the activities. By working backwards from the time of the event, you can figure out when you need to have each activity completed.
- Break down your schedule and decide what activities you need to have accomplished by the end of a week. Then you can schedule tasks throughout the week to make them more manageable.
- Have your team members create their own schedules, based on your master schedule. Review these schedules with them and make sure they fit with the master schedule.
- Most importantly of all, stick to your schedule.

Build your schedules below, or attach as a separate page.



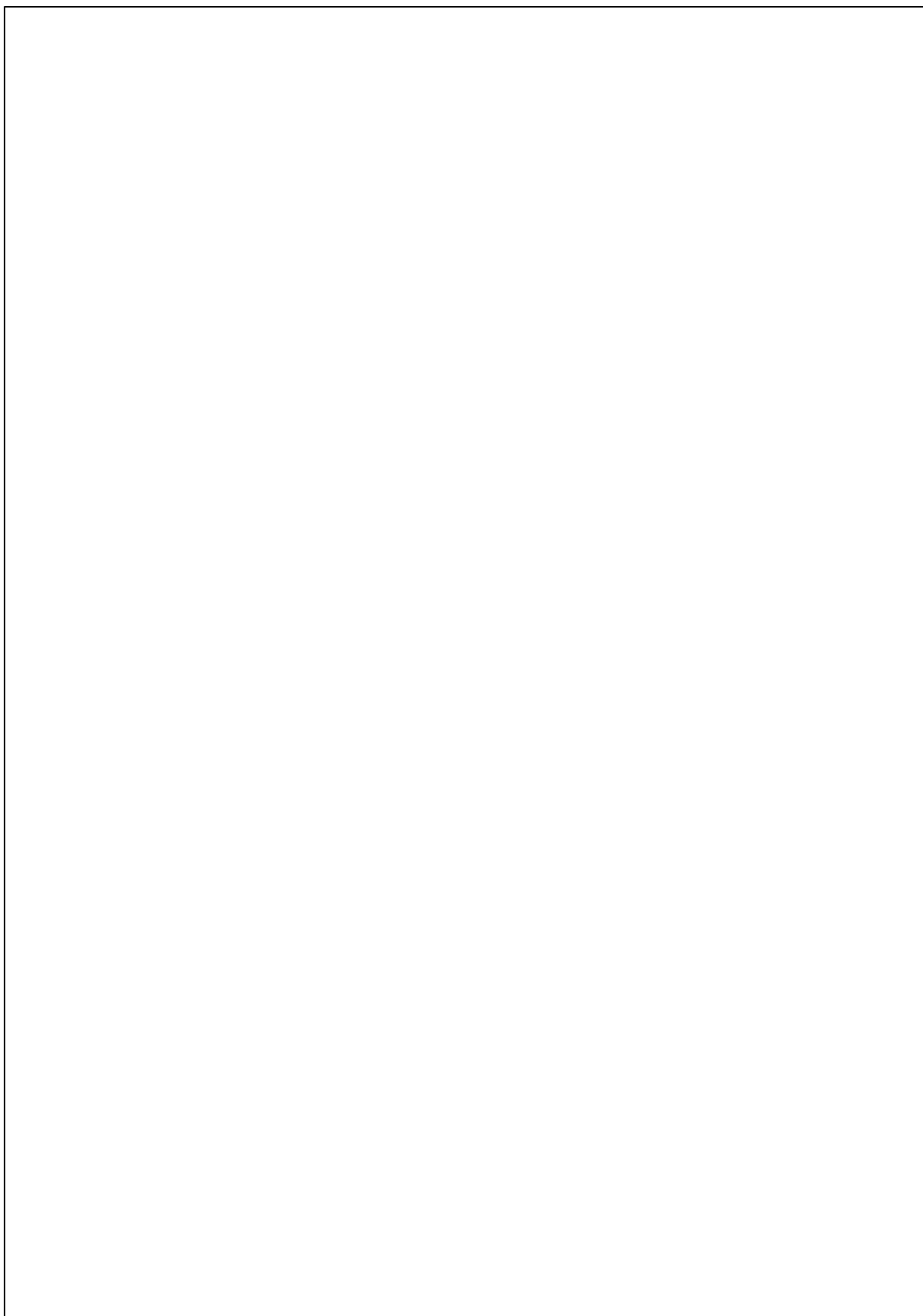
Step Three: The Performance

At this point, you and your team should have a thorough understanding of everything that needs to be accomplished and when you are going to accomplish it. As a leader, though, you need to plan for the *worst*.

20. In the box below, list everything that could possibly go wrong with this project. (Ex: Team member doesn't get something done on time, you don't reach your sponsorship goal, a band doesn't show up, the room you reserved suddenly isn't available anymore, nobody shows up for the concert, tornado cancels the event.)

A large, empty rectangular box with a thin black border, intended for the student to list potential problems for their project.

21. Now that you have identified everything that could go wrong, you need to plan for how you will respond to each of those problems. Each one may affect different aspects of your project, so you should work with each of your team members to develop your responses. Create those Disaster Response Plans below, or attach as a separate page.



You have your plan. Now, it is time for you and your team to execute that plan. If you've done everything right so far, then you should have: A vision of what a successful event looks like, team members with assigned responsibilities and goals to achieve that vision, a timeline for accomplishing those goals, a schedule for the day (or week) of the event, and plans for every type of disaster that could happen. How do you use all of that to actually put on a great project?

22. Throughout your planning process, schedule regular meetings with your team, either individually or as a group, to assess their progress and the status of the event as a whole. You need to know what is done and what isn't, and how you (and the rest of the team) can help other team members complete their tasks.
23. The week before your project is set to take place, go over your day-of or week-of schedule with your team to make sure that all of you understand your roles and deadlines for the coming week.
24. This is also a good time to incorporate other club members into your plans. In the box below, list all the tasks that you need volunteers for. Keep in mind that these tasks should not involve high-level concept planning, communications with people the volunteers aren't familiar with, or anything that requires a substantial amount of preparation. Think manual labor, set-up, take-down, ushering, etc.

25. Make announcements at your club meeting to find volunteers. Also consider utilizing Interact and Rotary clubs.
26. As the event approaches, also remember to utilize your Board of Directors. For instance, if you have a social media plan designed to publicize the event, work with the PR chair to use the club's social media accounts.

Finally, the day has arrived. When the date of the event rolls around, you should be completely prepared. This is the benefit of planning: You should just be able to sit back and supervise everything that is happening. Convert your day-of schedule into a checklist and make sure everything gets checked off. It can be *that easy* if you plan accordingly.

27. Here is the most important piece of advice I can give you for when the date of your event arrives: Relax. Problems will arise. Things will go wrong. The event might not turn out as planned. But if you have done everything in this workbook, you have done everything you can. No one can ask any more of you than that. So be alert and be prepared, but whatever happens you should be proud of yourself and your team. Make it your job to de-stress your team and to make the event as fun for them as possible.

Project planning can be a very fun and rewarding experience if you do it correctly. Make this as good of an experience as possible for everyone involved in the project. If you can do that, then your project will *always* be successful in the ways that matter most.

Step Four: The Follow-Up

Whew! The hard part is over. You survived. And hopefully, your project was a smashing success. But your job isn't quite done yet. You still need to tie up any loose ends and perform a few more tasks.

28. First things first: Make any remaining payments that need to be made or close out any bank accounts that need to be cleared. Your financial obligations should be covered before the event takes place, but in the event you still have some outstanding obligations, list them below.

29. Prepare a project evaluation form for you and your team members to fill out after the project is done. This is best prepared before the event takes place so that the evaluation can occur immediately afterward. Several considerations for crafting a useful project evaluation:

- Go through each task you performed in planning and executing this project and ask: Was there something that could have made this easier?
- Did anything go wrong? How did you solve the problem? If you didn't solve it at the time, how *could* you have solved it?
- What did you learn while planning this project? (Ex: Did you learn how to reserve rooms in a building? Did you learn that your event required security? Did you learn how to open a bank account?)
- What this event fun for you and your team? What could have made it *more* fun?

Think of any question that is relevant to the event and ask it of you and your team. Then save the results of the evaluation in your club's files so that future project chairs can consult them.

30. Prepare a final report for the project. It doesn't have to be long, but it should include your evaluation of the project, both qualitative and quantitative. How many people attended? How many Rotaractors were involved? How much money did you raise? Make it a narrative on the successes and shortcomings of the project. Write it as though you are giving the next event chair all your advice for how they can run this event successfully. Present a summary of that report at a board meeting and save it in your club's files.
31. Write thank-you notes to *everyone* involved. Thank every one of your team members, every secretary that helped you reserve a room, every Rotarian who offered you advice, every band who offered to play in your concert, every sponsor who gave you money, etc. You don't need to thank those who attended the event, but you should write a note to all the people who contributed to its success. This is simply a good way to maintain relationships with people who you may need to work with in the future. Plus, if you make them feel good about helping you, they will be more likely to help the club with the event next time.
32. If you solicited sponsorship and those sponsorships require any post-event performance on your part, make sure you fulfill all of those obligations. For instance, some school departments require that any organization receiving sponsorship money must submit pictures and a summary of the event to that department. Not following through on those requirements may preclude your club from getting sponsorship from that department in the future.
33. There is one final thing I recommend doing after an event: Celebrate with your team. Go out for ice cream, watch a movie, do something. You are the leader and you should lead them in feeling good about their accomplishments. Make this a great experience for them.

And that's it! If you follow the steps laid out in this workbook, you should be well prepared to put on a successful event. Of course, no two events are the same, and there will always be different considerations for different projects. In that respect, this workbook may sometimes be inadequate or even unnecessary. But the point of these guidelines is to give you a glimpse of what makes a successful project and to encourage you to think critically about planning and executing your project, whatever it may be. So go forth, be prepared, and always remember the cardinal rule of project planning: HAVE FUN!