TOOL KIT FOR THE PROJECT MANAGER

Thank you for leading your team as the project manager. In this role, you organize team members, tasks, and materials so your team moves toward its goals efficiently and on time. Project management takes great executive function—the planning skills you use when visualizing a finished product, breaking it into its parts, and making a plan to achieve a finished product.

This work gets more challenging the larger the assignment is. In addition to generating an initial plan, you monitor progress, provide status updates, and revise the plan as needed for individuals and the group in response to your observations. You are responsible for discussing team member progress directly with individuals to ensure everyone is supported. You are empowered to assign team members tasks that fall into their areas of strengths, so it is important for you to understand what your team members' skills are. Finally, you are responsible for appropriate use of resources. If your team is conducting research or using artificial intelligence (AI), you support the team's meeting standards for academic honesty.

Project managers are essential leaders in organizations. Your service is valuable not only for productivity, but also for ensuring the team's well-being (Aeon, Faber, & Panaccio, 2021). When well built and followed, a strong project management plan helps individual team members feel effective and sets boundaries so that the work does not take over everyone's time.

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Role Responsibilities and Resources

In this section you get an overview of your responsibilities and the resources in this tool kit. These resources will help you meet the expectations for your role. You might use some of the tools regularly, while using other tools only in certain situations. Some you never need to use at all. You can revise these tools so they work well for you or replace them with tools you make yourself. Use them strategically.

- **Leadership Responsibilities Overview:** Create project plan, monitor and adjust project plan to complete scope of work well and on time

- **Leadership Condition:** Opportunities to lead

- **Leadership Practice:** Experiment with strategies

- **Tool Kit Topics:** Divided into two topics used to support (1) team meetings and (2) project plan creation and management

You might use the **"Eisenhower Matrix"** (page 8) to manage your time.

Team Meetings

The facilitator will call regular team meetings. Come prepared to provide updates on your responsibilities. Before the start-of-cycle meeting, be prepared to identify key priorities. Throughout, use a calendar or work-flow tool to assess if the team is on track toward its priorities. Be prepared at mid-cycle and end-of-cycle meetings to provide a status check and offer suggested adjustments to the workflow.

Additionally, you can have brief one-to-one check-ins with other team members. Use the following questions to keep those check-ins brief and focused:

Are you finding you have the right amount of time and the right materials to stay on track?

Is there anything I can do to help?

Are you clear about what you need to do?

Project Plan Creation

When team systems are disorganized, a project plan can bring them into order the way a graphic organizer does for an essay. The following figure lists some of those tools. Select the tools your team will have available to manage the project's communication, calendar, time management, and workflow. Consider options provided in the table or other options available to you through your school. If you would like to use a tool that is not currently available to you, consider asking the advocate to request it. You may prefer digital or physical tools. Build in time to learn how to use the tools and to train team members about tools they are unfamiliar with.

Category: Communication
· Standing meetings
· Synchronous check-ins over phone or video
· Phone texts or direct messages
· Comments made directly in shared online documents (such as Microsoft Word or Google Docs)
· Messenger apps (such as Google Chat, Microsoft Teams, Slack, or WhatsApp)
Category: Calendar
· Digital calendar with shared calendars for each team member
· Physical calendars
· Agendas
Category: Time Management
· Strategic use of calendars
· Time management techniques (such as an Eisenhower matrix or the Pomodoro technique)
· Sub-deadlines and checkpoints
· Visuals that display the timeline or the expectations for finished products
Category: Workflow
· Kanban boards using sticky notes or apps (such as Jira, Mira, Notion, or Trello)
· Gantt charts

Communication Tools

Ensure everyone on your team is using agreed-on communication tools when working on the project. Review the list provided above. Consider what your school provides and what is available to all of your team members. Select a communication tool or tools for your team to use. Agree on boundaries for your communication. For example, if you are texting about the work, are there hours of the day or days of the week that are off limits?

Calendar Tools

Ensure everyone on your team is using agreed-on calendar tools, such as those listed above. If you are using digital calendars, ensure you and your team are using all the capabilities that your digital calendar offers, including sharing individual calendars, creating a team calendar, adding all deadlines and meetings, attaching relevant resources and agendas to the calendar events, sending invitations to relevant people, color coding, and marking team members out of office when they are absent. Adjust the calendar regularly.

Time-Management Tools

If a team member needs more support with time management, you might ask if they are open to discussing a tool or technique. If the team is using a particular calendar, determine whether there are additional functionalities you can introduce, such as reminder alerts before deadlines. You can also add sub-deadlines to the calendar. If someone is overwhelmed, introduce techniques like the "Eisenhower Matrix" (page 8) or the Pomodoro technique. Finally, examples of completed work that meets the expectations, or visuals of timelines and rubrics, can help make expectations clearer.

Workflow Tools

As the project manager, you will select a workflow tool to create and manage. Workflow tools allow teams to organize all of its tasks and identify who is in charge of each one. Select one of the two tools explained in this section: (1) the Kanban board or (2) the Gantt chart. You can create either using digital tools or on paper. In the following figure, you can see two options for organizing a KanBan board. In either setup, teams can use physical or digital sticky notes or cards and move them to different categories to make the workflow visible and adjust tasks depending on team members' capacity and interests. For example, if Bonnie falls behind and Deontae is caught up with his tasks, he can take a sticky note from her board and move it to his own to demonstrate that he is now working on that task.

OPTION 1

On the Horizon	Next Week	Doing	Done	Parking Lot

Tasks	Amber	Bonnie	Carlos	Deontae	Looking for Review	Done

The team can break larger tasks into smaller tasks. For instance, consider this task: *Create a mood board that represents ideas from your design research. Interview a representative set of members of the community about their feelings about the current design, your mood board, and their own ideas.*

A team could make the following cards to place on the Kanban board.

- Identify the cultural inspiration reference points for the mood board, including inspiration from nature.
- Write a paragraph about how we picked the cultural inspiration reference points.
- Research the furniture in the mood board.
- Research the artwork in the mood board.
- Research the color scheme in the mood board.
- Research native planting ideas.
- Decide on the actual mood.
- Create the mood board.
- Have backup ideas for the mood board.
- Write interview questions.
- Anticipate potential community feedback to the plan and plan responses.
- Identify strategies to manage our emotions and support each other during feedback.

The Gantt chart is another common workflow tool in the professional world. It allows users to lay out workflow tasks sequentially (in order) and ensure everything is on track. In the following figure, you can see the tasks of the example assignment laid out by week.

Steps	Week 1	Week 2	Week 3	Week 4	Week 5
Form team and identity roles and responsibilities.	X				
Describe the design of the initial teen room. Identify current cultural influences.	X				
Identify the communities being served by the library. Research interior design aesthetics in libraries in those communities.		X			
Create a mood board. Interview a representative set of members of the community about their feelings about the current design, your mood board, and their own ideas.		X	X		
Analyze results of community interviews and create a mockup design based on what you heard. Write a paragraph about how you took the feedback into account and what influences inspired elements of the design.			X		
Check in with your own emotions about the old design, the new design, and your aesthetics. How do you feel about the design the community wants? What would you do differently if it were your own space?			X		
Present preliminary designs for feedback. Revise the design accordingly. Create a final proposal for the design.				X	
Prepare a three-minute oral presentation. Run through the presentation for feedback. Revise presentation accordingly.				X	X
Give the final presentation to community members.					X
Reflect on process.					X

MONITOR AND ADJUST PROGRESS

Using the workflow tool, keep tabs on how the work is moving toward completion. Be ready to give status reports at the weekly meeting and to adjust the plan to keep things on track. If individuals or the group as a whole falls behind schedule, you may need to discuss assigning additional work or homework or advocate for more time. If individuals or the group as a whole gets ahead, you may need to identify the highest leverage, most motivating ways to use the time well.

ADJUST ROLES AND RESPONSIBILITIES

You may find that roles seem unclear or out of balance, or that someone needs more support in order to meet the responsibilities of their role.

In these cases, you may make any of the following corrections.

- Redistribute responsibilities.

- Rotate roles between members.

- Clarify expectations for a role.

- Break the expectations into smaller parts.

- Provide more training or resources. (See the next section.)

PROVIDE TRAININGS ON PROJECT MANAGEMENT TOOLS OR RESOURCES

If someone is using a tool or resource and could benefit from more training on how to use it to its fullest potential, provide training for them. Use the steps below to prepare that training.

1. Learn the features or resource well yourself. Do that by using available resources—such as walkthrough videos—made by the company or product creator.

2. Create a one-page handout that gives an overview and provide one to each member.

3. Conduct a training session. Consider including the following three elements in equal parts.

   a. Walk through the tool or resource as a whole group.

   b. Provide silent time for team members to experiment with the tool or resource (known as a *sandbox time*).

   c. Discuss findings and questions as a whole group.

      For example, if you have thirty minutes to provide a training on Google Calendar, you could spend 10 minutes showing off the most important features, 10 silent minutes letting everyone else try out Google Calendar for themselves, and then 10 minutes talking together about how it went.

CARE FOR THE PHYSICAL SPACE

Ensure that your team leaves everything in the classroom in as good a condition as they found it—or better. For example, if you are working with classroom resources (such as graphing calculators, laptops, or novels), ensure that everyone on your team takes responsibility for their care. Additionally, ensure that the classroom is clean when you leave. If you are concerned about materials or maintenance, you may want to draw up a team agreement or collect materials and ask to keep them in a secure location.

Eisenhower Matrix

This template splits to-do lists into the four categories of (1) important and urgent; (2) important but *not* urgent; (3) urgent but *not* important; and (4) *not* important and *not* urgent.

Record tasks in the matrix, organizing them by their level of urgency and importance.

	URGENT	NOT URGENT
IMPORTANT	Do	Schedule
NOT IMPORTANT	Delegate	Delete

Reference

Aeon, B., Faber, A., & Panaccio, A. (2021). Does time management work? A meta-analysis. *PLoS ONE*, *16*(1), Article e0245066. https://doi.org/10.1371/journal.pone.0245066