Project Management for Legal Aid Toolkit

Submitted by GravityWorks on Fri, 02/14/2025 - 2:19 PM

The legal aid community is constantly evolving to improve and expand its services. From document assembly libraries to case management systems, organizations are taking on projects that will increase efficiency and advance their missions. Project management is vital to this work. Project management reduces costs by improving efficiency, mitigating risks, and optimizing resources.

With limited resources, it is important that legal aid organizations prioritize project management. Using project management methodologies ensures organizations can complete projects on time and within budget. Good project management can also lead to better project results overall.

To strengthen the project management skills within the legal aid community, LSNTAP and Just-Tech, LLC partnered to develop this project management toolkit. This toolkit is not just for those that have project manager as their title. It is for anyone. We are all project managers. Use this toolkit as a guide for your next project. It details each of the process groups in the project life cycle and includes downloadable templates.

1. Project Management Toolkit: Introduction

Submitted by GravityWorks on Fri, 02/14/2025 - 2:22 PM

Overview

According to the Project Management Institute (PMI), project Management is the application of knowledge, skills, tools and techniques to project activities to meet the project requirements.

Project management is important because it ensures what is being delivered is right, on time, and within budget while also providing leadership and direction to the project. Prioritizing project management methods allows organizations to deliver real value and avoid overspending and mistakes.

There are many project management methodologies. Some methodologies are better for certain industries or a certain size and complexity level. Choosing a methodology is one of the first decisions made by the project manager. Project managers chose a methodology based on their industry and type of project. Common methodologies include:

- Agile
- Lean
- Waterfall
- Scrum
- Kanban
- Six Sigma

The project management project life cycle has five phases: initiate, plan, work, monitor, and close. Each of these phases has key questions and activities that should be completed during the phase. Below you will find a quick overview of each of these phases.

Initiate: This is where it all begins. In this phase, define the situation and figure out how to achieve the project goal.

Plan: After establishing what the project is and what objectives are involved, now it's time to divide and conquer. In this phase, develop project roles, create a schedule, draft a project plan, and hold a kickoff meeting.

Work: With a realistic plan in place, the project work can begin. In this phase, set up a project management system, assign project activities and establish clear communication channels.

Monitor: Now that the project team has their task(s) and knows how to communicate, it's time to monitor the project. In this phase, evaluate how things are going, provide status reports, and document any identified issues and/or risks. If any changes to the scope of the project are implemented, this is the time to document those as well.

Close: Once the work is complete and project goals are met, it's time to close the project. This phase of the project is often overlooked, but it is such a valuable part of the project life cycle. In this phase, make sure the project goals and objectives are fulfilled. It is also the time to celebrate the success of the project and reflect on what was learned from the project.

To help illustrate how the project life cycle works, we will reference a hypothetical legal tech project throughout this toolkit. The purpose of the hypothetical project is to give you a real-life example of how to apply the project management principles set forth in this toolkit.

Hypothetical Project

Imagine you work for a statewide self-help website. You've always wondered what happens after a user visits your site. You and your team have decided to launch a project that will send SMS messages (texts) to visitors after they visit your site to gather information about their outcomes. 0

2. Project Management Toolkit: Initiate the Project

Submitted by GravityWorks on Fri, 02/14/2025 - 2:25 PM

Key Questions

In the Initiate the Project phase, there are two key questions to be answered:

1. Why are we doing this project?
2. How will we get there?

Key Activities

There are three key activities that provide helpful structures that will serve the project from start to finish. These are:

1. Define the situation
2. Identify the theory of change
3. Generate a logic model

Define the Situation

In order to answer one of the key questions - Why are we doing this project? - we need to first understand the context in which the project is situated.

What Is the Problem?

The first step in formulating a response to the question of "why are we doing this project?" is to define what the problem is that the project seeks to address. Defining the problem lays the foundation for creating a common understanding that is essential for stakeholder buy-in.

Who Is Affected by the Problem?

Who is affected by the problem? These individuals, communities, and populations must be identified at the outset. They hold expertise about the situation itself and hold expertise from lived experience that should inform the solution's design and implementation.

What Causes the Problem?

Additionally, those who are affected by the problem may have insight into some of the less visible causes of the problem. A critical aspect of defining the situation includes identifying what is causing the problem that is being addressed. An answer to the problem must be in response to the causes of the problem.

Leveraging existing research to inform the design and implementation of the project will only improve the likelihood of achieving the intended outcomes. Evidence-based practices increase the effectiveness of civil legal aid. The Legal Services National Technology Assistance Project and the National Civil Legal Aid & Defender Association (NLADA) house hundreds of free research reports and technical assistance resources. You can learn more about civil legal aid research database created by NLADA here: https://www.nlada.org/tools-and-technical-assistance/civil-resources/civil-legal-aid-research.

Identify the Theory of Change

We recommend thinking through a project's theory of change (TOC) and developing a project logic model as part of the Project Initiation phase. The project's TOC describes how and why a project purpose will be achieved in a given context. The associated logic model visually depicts and summarizes the key elements of the TOC. Its visualization of what is needed to achieve the project's intended outcomes makes it a great facilitation tool in the Project Initiation and Project Planning phases. Effective project planning leverages a TOC into a project logic model, which helps generate mutual understanding about the project's purpose among all stakeholders.

Theory of Change

Theories of change are important for developing a rigorous plan that seeks to answer how and why an intended change will happen. According to USAID's How-To Note, a project's TOC should include the following five components:

1. The defined context in which the problem to be addressed is situated.
2. If-then outcomes that are needed to achieve the desired change.
3. The deliverables that the project will produce to achieve the if-then outcomes.
4. Foundational assumptions about project efforts and expected results.
5. Key indicators to monitor the progress of the project during implementation.

A starting point to developing a theory of change from the initial idea is to map out a process diagram for the intervention being considered. Watch the video below to learn more.

To support community-based organizations in accessing the benefits that a TOC brings to a program when utilized from the outset, the Aspen Institute's Roundtable on Community Change published the free resource The Community Builder's Approach to Theory of Change: A Practice Guide to Theory Development. Similarly, the Annie E. Casey Foundation created a report to support non-profits in developing a TOC in its report Theory of Change: A Practical Tool for Action, Results, and Learning.

## Generate a Logic Model

Logic Model

In contrast, logic models are helpful for generating mutual understanding among all stakeholders by leveraging a graphic visualization of the relationships between inputs, outputs, and intended outcome. A logic model breaks down a complicated theory of change into the basic building blocks that lead to the desired change. Thus, the logic model is a snapshot of what the project is about. They not only serve as effective communications tools for stakeholders, but they also provide the project manager with a roadmap and organizing framework for the duration of the project.

The United Way has paved the way for the use of logic models in program development and evaluation. For a detailed treatise that provides detailed guidance on anything related to the development of a logic model, please review its free publication Measuring Program Outcomes. Another great resource to utilize that was created as an online module by the

University of Wisconsin is [Enhancing Program Performance with Logic Models](#).

Backwards Design

While it may seem counterintuitive, a logic model is built backwards by starting with the intended outcomes. This is called backwards design. Identifying the intended outcomes at the outset of the project enables better identification of the necessary activities to achieve those outcomes. Once the necessary activities are identified, then it is possible to identify the necessary inputs. Thus, all work and resources on the project are oriented around achieving these outcomes. Ironically, starting project planning at the end eases the cognitive load of planning for a goal line that seems hopelessly far away and difficult to achieve. In fact, starting from the outcome allows the natural milestones for the project to surface more easily.

Here is an example of a logic model template for a legal services project:
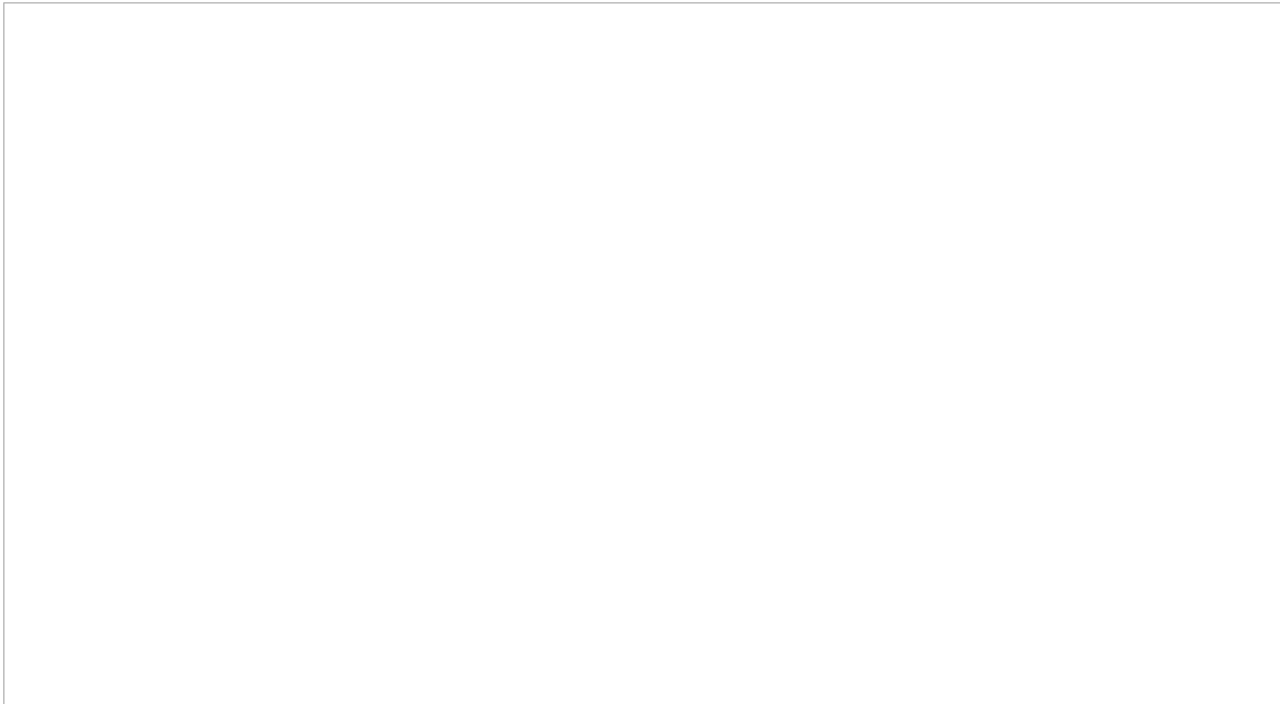
To assist you in developing your logic model, use this worksheet here: Logic Model Worksheet

Identifying Outcomes

After a problem statement has been articulated, the outcomes the project is seeking to achieve need to be identified. Why is the focus on identifying outcomes rather than the project's goals? Goals are part of a dialogue with respect to the vision for a desired change. This vision is often part of a long-term change. Goals are derived from an organization's mission statement, such as to increase access to justice for all. As a result, they are typically not measurable, but speak to the intentions of the program leading the project. In contrast, outcomes are both observable and measurable.

Moreover, identifying outcomes is the first step in the exercise of generating a logic model for your project after the situation has been defined. A logic model illustrates the interconnectedness of your project's outcomes, outputs, activities, and inputs. Emphasizing outcomes, which are both observable and measurable, enables the project manager to monitor whether the project is achieving the desired results. The visualization of the interconnectedness of the various aspects of the project and how everything is oriented towards accomplishing these outcomes creates a strong foundation for communication with all stakeholders because of the collective understanding.

Another outcome-driven planning method is the Objectives and Key Results framework (OKR) that is used on projects to define measure goals and to then track the outcomes. Watch this video from Simon Rah to learn more about OKR.

How We Will Get There

Once the intended outcomes of the project have been identified, you now have an intended destination for the project. Building out the remainder of the logic model will provide a roadmap for how to achieve the intended outcomes.

Reviewing Similar Projects

To help identify the components of your project's logic model, it is often invaluable to reach out to other programs about their similar projects that are further along in development. Starting these discussions explicitly talking about the project plan, what worked well, and what the program would have changed about the initiation of the project will frame your conversation to address initiation issues. Thus, your project plan will jump the inevitable learning curve of managing this type of project. One tool going into this conversation that flags differences between the projects that may inform differences in design is that you have already identified your project's intended outcomes. Thus, for comparison purposes, it is helpful to learn what other projects' intended outcomes were at the initiation phase of the project.

Understanding the components of a similar project can help provide a starting point for consideration when building out your logic model to identify the outputs, activities, and inputs that will be part of the project.

Outputs

Within the framework of a logic model, outputs are quantifiable products of the work and services that are provided. They are indicators of the effectiveness of the implementation. An example of an output could be: "provided 100 individuals each month with brief services using the texting legal self-help platform."

Activities

Activities identify the work that needs to be done to generate the outputs, which are the deliverables and services that will be provided. Typically, activities should be broken down into chunks of work that are estimated to take less than eight hours to complete.

Here are some helpful tips for building a list of activities:

- Work Breakdown Structure: start by creating a Work Breakdown Structure. This is a visual representation that identifes the different areas of work that must be completed. It then breaks down the umbrella categories into activities. This is an example of a Work Breakdown Structure for the hypothetical Texting Legal Self-Help Project.
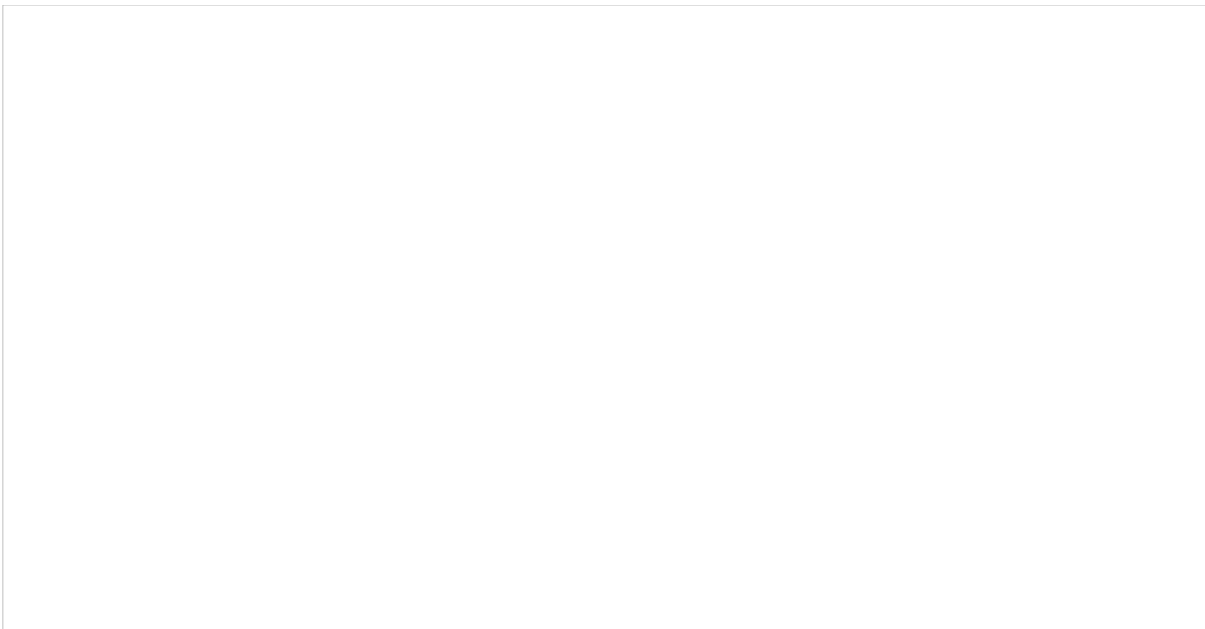
- 100% Rule: the complete list of activities should encapsulate all of the work that is needed to complete the project.
- Clear Delineations: each activity should be separate and distinct from all other activities (i.e., no overlap).

Inputs

After completing the steps discussed above, you are now ready to build a list of all the inputs you will need for the identified outputs to both start the project and to maintain the project once the development is complete. Essentially, inputs are what is invested into the project that could be: staff and staff time, volunteer and volunteer time, partner and partner time, outside consultant time, funding, technology, equipment, and other resources.

Assumptions

Assumptions answer the question what are the conditions or resources that are needed for the success of the project?

External Factors

External factors are background or existing factors in the community that influence the context in which the project takes place and for which you have little control.

Wrapping Up the Project Initiation

For project sustainability purposes, project planning always has the end in mind. As a result, it is essential to have a plan for how you will exit the project. The National Center for State Courts (NCSC) published a pamphlet that provides guidance on how to exit technology projects. While it was developed for court systems, it is also a helpful tool for legal services providers for their technology projects. You can find the pamphlet here.

pm toolkit logic model worksheet

3. Project Management Toolkit: Plan the Project

Submitted by GravityWorks on Fri, 02/14/2025 - 2:38 PM

Key Question

As we enter the Plan the Project phase of the project lifecycle, the project manager's work revolves around answering a singular question:

How do we divide and conquer the work to be done on this project?

Key Activities

There are four key activities that provide helpful structures for answering this question and laying a foundation for the remainder of the project. These are:

1. Develop a Project Roles Chart

2. Create a Gantt Chart
3. Hold a Kick-Off Meeting
4. Draft a Project Plan

This section will discuss each of these activities and the concepts they build upon.

Project Roles

During the initiate the project phase, the project manager defined the work that needs to be completed on this project through the completion of a logic model and work breakdown structure. Now, to start addressing how do we divide and conquer this work, the project manager needs to define "we." Watch this short video to learn more about selecting your project team.

Who are the people who will be working on this project in some respect? For staffing this project, it is helpful to identify the types of roles people may serve in, which can vary from taking on large parts throughout the lifecycle of the project to only providing specialized expertise on discrete aspects of the project.

One way to conceptualize these roles is through the MOCHA model, which offers a tool for clearly delineating the roles of people on a project. MOCHA stands for the five types of roles:

1. Manager
2. Owner
3. Consulted
4. Helper
5. Approver

Manager

There is one manager of a project who holds the owner of the project accountable. This person is often the owner's supervisor. The manager serves as a resource to the owner by providing the owner feedback, asking clarifying questions, reviewing progress, and intervening if the project goes off track.

Owner

There is one owner of a project who is responsible for driving the project forward and serves in the role that we typically consider to be the "project manager" role. The main responsibilities of the owner are:

- Delivery of all the work
- Delegating work to helpers and consultants
- Creating and maintaining project planning and management tools

Consultant

A consultant is a person who is external to the organization and is brought in for specific skills or subject matter expertise. There may be many consultants who work on a project.

Helper

A helper is a person who is internal to the organization and brings specific skills to work on discrete deliverables. There may be many helpers who work on a project.

Approver

There is one approver, and this person is the one to sign off on the major decisions of a project. The approver may also be the owner or manager.

Identifying Needed Roles from Activities in Logic Model

The logic model will serve as the guide for identifying what staff and external support are needed to complete the work on the project. Based on a review of the activities in the logic model, the project manager will identify all specific skills and all subject matter expertise that will be needed to complete these activities. Using these defined areas of responsibility, the project manager will assign these to helpers and consultants.

Project Schedule

A project schedule is a list of all work that needs to be completed on a project with each activity's associated deadline for when it needs to be completed. Creating a schedule that is acceptable to all project stakeholders creates a strong foundation for the project.

Milestones

Project milestones are specific events over the course of the project that show an important achievement or completion of a major phase. They serve as natural points that demarcate distinct phases of the project, which provides order and organization that make completion of the work more manageable. Milestones also enable the project manager to have a big picture perspective about how groups of individual tasks culminate into project deliverables and provide a checkpoint to compare progress against the overall schedule.

Harnessing the power of milestones' delineation of specific phases of the project should also be utilized in the planning phases. Identifying the specific achievements over the course of the project enables a project manager to generate a list of activities and the respective completion dates.

Gantt Chart

A Gantt chart is a horizontal bar chart that visualizes the activities within a project to a schedule. Activities and tasks are identified on the vertical axis and the schedule is identified along the horizontal axis.

A project manager can superpower a project's Gantt chart to become a task management tool by color coding the bars to represent who is responsible for completing the task. The benefit of mapping scheduled tasks to staffing assignments is that it creates a sole source of truth that is viewable by all for defining responsibilities. It is not only helpful for onboarding people to a new project by introducing each person to respective responsibilities, but it also serves as an accountability tool. Other benefits include:

- Improves communication through explicit identification about tasks and associated deadlines
- Prevents bottlenecks in decision making and approval
- Prevents conflicts about task ownership
- Visualizes the distribution of work, thus enabling more equitable workloads
- Eases the pain points of turnover by facilitating onboarding of new people to the responsibilities of the role

Here are some best practices for developing the chart:

- First identify all the milestones and the respective deadlines
- Next identify the project tasks that are needed to reach the milestones
- Avoid adding tasks that are generic or administrative
- Align each task with a due date
- Each task should have at least one person assigned who is responsible for the work
- Do not overload any team members

Here is a Gantt Chart template that can be utilized in your project: Sample Gantt Chart

Creating a Foundation for Communication

A critical part of the Plan the Project phase is creating the foundation for communication. The Project Roles Chart and the Gantt Chart provide visual tools defining scope of responsibilities for everyone working on the project. These are important communication tools because they make each person's responsibilities transparent to all.

Project Communications Plan

A Project Communications Plan is another important aspect of this foundation that identifies what, when, and how information will be shared at key intervals. Creating this plan provides the project manager with a structure for communicating with stakeholders over the course of the project, which helps maintain stakeholder engagement and buy-in that is critical for completing any project.

Here is a Project Communications Plan template that can be utilized in your project:Sample Project Communications Plan

Closing Out the Plan the Project Phase

Project Plan

Once these project planning and management tools are developed, a helpful way to reference all these resources that will be utilized throughout the project is to create a Project Plan. A Project Plan is the central document for a project that identifies all the project planning and management tools being used. It serves as a checklist for quickly onboarding someone new to the project.

Here is a Project Plan template that can be used in your project: Sample Project Plan

Kick-Off Meeting

After the project manager has developed the project planning tools discussed in the Initiate the Project and Plan the Project phase, it is helpful to have a kick-off meeting to orient stakeholders to the project plan. Watch this video to learn more about

kick-off meetings.

Here is an example agenda for a kick-off meeting: Sample Kickoff Meeting Agenda

[pm toolkit kickoff agenda template](#)

[pm toolkit project plan](#)

[pm toolkit project communications plan](#)

[pm toolkit gantt chart](#)

4. Project Management Toolkit: Work the Project

Submitted by GravityWorks on Fri, 02/14/2025 - 3:02 PM

You have initiated the project and planned as much as you can (or need to), and now it is time to "work" the project. Commonly referred to as the "execution" phase, this is when you and the team start to execute tasks to bring the project vision into reality.

During this phase, a lot of the project manager's heavy lifting is usually done – it is up to the members of the team to complete tasks. (Unless you wear multiple hats and are also responsible for executing tasks defined in the project plan.)

This does not mean that a project manager can just sit back and relax during this phase. While a project manager may be playing a less central role in driving the project forward during the execution phase than during the initiation and planning phases, a project manager's responsibility to assign tasks, manage processes, and facilitate communication during this phase is critical to meeting the project goals and ensuring that the project stays on track.

Main Responsibilities during Execution Phase

A project manager has three main responsibilities during the execution phase: managing people, managing processes, and managing communication.

Managing People: During this phase, the team members need to know what each member is doing, and will need to have all the information and resources necessary to complete their tasks. A project manager needs to make sure that each team member has enough clarity about what they are doing and by when it needs to be done. If things need to be defined more clearly, or a team member is missing key information or needs additional resources, it is the project manager's responsibility to remove those barriers to progress on a task. And in the event that a team member is not suited to perform the task assigned, the Project Manager needs to change course and find a different way to get the work done.

Managing Processes: The project manager is responsible for defining and overseeing the processes by which the team will execute project activities. This includes setting up systems and structures for managing project documents, tracking project activities and tasks, and communications tools. An organization or team that has worked on many projects together may have established processes and systems that have worked in the past, but it is also important for a project manager to be prepared to adapt and modify project management processes, if necessary, for example, if the team composition requires a different approach, or because the project scale or complexity demands it.

Managing Communications: A project manager serves as the lynchpin for effective communication across the project team and with stakeholders. During the execution phase of a project, the Project Manager should be following the Communications Plan created during the planning phase, and ensuring that the right information is flowing freely. Any breakdowns in communication must be addressed quickly to avoid the possibility of unidentified risks or issues growing into larger problems.

Key Questions

- Who should be assigned to project activities? Are there any roles or skills missing in the team?
- Have we clearly identified the activities so that they are actionable?
- How will we work together as a team to understand what needs to be done, and by when?
- Is the team communicating well? Are the stakeholders getting the information they need?

Key Activities

- Set up a project management system (such as a spreadsheet, shared Word document, or project management software) and define how the system will be used by the team.
- Assign project activities and tasks with clear completion criteria and deadlines.

- Establish clear communication channels, norms and practices with the team and stakeholders.
- Review progress of project activities and monitor project communications. Determine whether processes are working and adjust if necessary.

Who is Doing What Work?

Task Management vs. Project Management

During the "execute" phase, the project team begins to drill down into task management and complete the actual work on deliverables.

For team members, task management during execution is about determining what needs to be done to bring a specific task to completion, and then performing those steps and reporting back to the project manager and the rest of the team when the task is complete. Assigned team members need to "own" the mini lifecycle of each task they are assigned, and need to exercise their own judgment about how to prioritize their time between different tasks, between tasks related to this project, as well as balancing the priorities measured against other work they are responsible for.

A project manager may be responsible for specific project tasks during the execution phase, but their essential role during the execution phase is to monitor the progress (or lack thereof) on the tasks that have been assigned to project team members and ensure that tasks are being completed in the most logical sequence and with a focus on the right priorities.

Defining and Assigning Tasks

Ideally, the work of defining tasks will have been completed during the planning phase of a project, but project managers should expect to continue defining tasks during the execution phase as well. It is unrealistic to expect that tasks will have been completely and thoroughly anticipated during project planning, and often the best a project manager can hope for is to define project tasks more broadly during planning with the intention of drilling down into specifics during execution as more information is needed or becomes available. For example, during planning for a project that involves data migration, a project plan might simply have the task "Prepare data for migration" in the activity list, because spelling out all the steps involved in preparing the data may result in an activity list that is bogged down with too many granular items. Project Managers can use a defining and assigning tasks chart as a way to define tasks and note who is assigned to each task. See below.
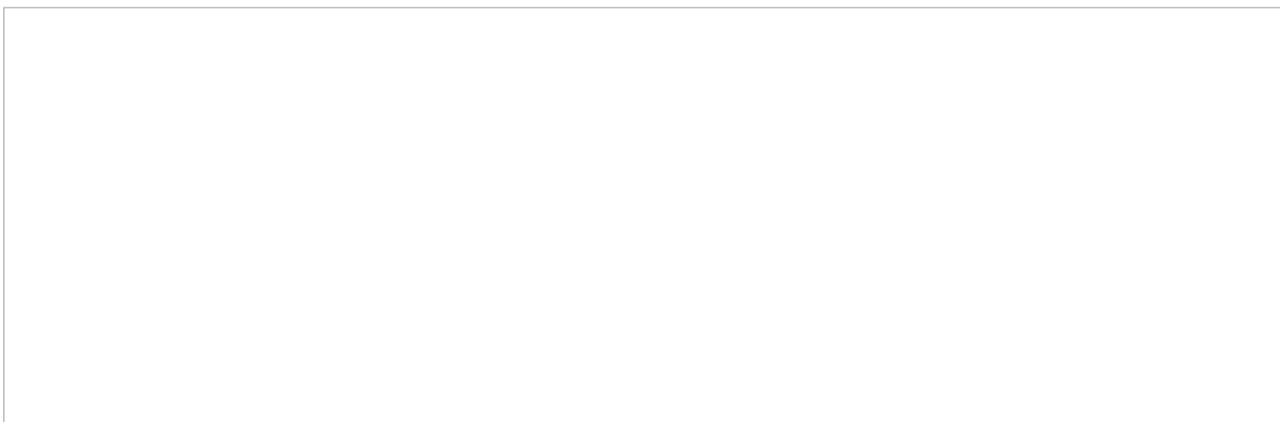
As a project manager, you should not expect that you will always be able to define and estimate effort on tasks with a high degree of accuracy or thoroughness during the planning phase of a project, and you should always expect to do some of this during execution. The ability to define and estimate the effort on project activities thoroughly and accurately depends a lot on how much experience you have managing a particular type of projects, whether the project involves learning about new software, processes, or systems, and whether the project stakeholders have clearly defined what it is that they are expecting. Without a clear understanding of what you are building towards and how you are going to get there, it is inevitable that you will be spending time defining tasks as you go during the execution phase.

The Activities List and Task Tracker

An activity list and task tracker are essential components to effectively executing a project plan. A project activity list is a breakdown of the deliverables in the project into manageable chunks of work that can be assigned to team members. A project task tracker tracks the various ad hoc tasks that often emerge while executing a project that may not belong on the activity list. Together, they should represent the total amount of work needed to complete a project from beginning to end.

What is the difference between the two? Generally, scope and purpose.

Remember, an Activity List should be created during the planning phase, and it is your best effort to break down project deliverables into manageable chunks of work. Activities on the activity list should not be unmanageably large. For example, if your project is "Implement Learning Management System" the activity "Create Content" may be too large and vague to manage properly and may need to be broken down further into smaller chunks like "Create Microsoft Word Training Content" and "Create Case Management System Training Content." On the other hand, activities on the activity list should not be so

granular that you overwhelm yourself and the team with details. Taking our Learning Management System example, you would not want to define a very granular task like "Email Sally at Learning Management Corp to schedule a product demo."

A good rule of thumb for knowing how much it takes to break down project deliverables into an activity list is to keep them to between 8 and 80 hours of work. Any more than that, and you will have trouble keeping track of the task because it is a major sub-project. Any less than that, and you will be at risk of getting lost in the weeds as you try to micro-manage sub-tasks.

A task tracker, on the other hand, is exactly the kind of document or tool you would want to use to track granular tasks, such as sending out coordinating emails, or uploading the organization's logo into your shiny new intranet's header. Often during a project, small tasks come up during meetings or while conducting other project work that are not large enough to be added to the Activity List. That is where keeping a Task Tracker for your project comes in. It can be a simple Excel list with a Subject, Date, and Assigned To field. Or you can use tools such as Microsoft Planner, Trello, or any number of other project management tools. The important thing is to capture these tasks somewhere, or else risk losing track of them. Even a small task may be critically important if it is part of a larger project activity or there are dependencies connected to completing it. Watch this video to learn more about tracking tasks.

What Project Management Tool is Right for You?

The right project management tool for you and your team depends on several factors. Do you already have an approach that you have used with this team or another team that has worked? Is the project extremely complex, with lots of dependencies and multiple components that can be worked on in parallel? How much change can the team (as a whole or individually) tolerate? How much time do you, as a project manager, have set up a new project management system, and train the team on how to use it?

Using What You Have

It may make the most sense to start by using the tools and systems you already have on hand to manage the project activities. One of the most common pieces of software used to manage projects of all types is a basic spreadsheet like Microsoft Excel or Google Sheets, because it is infinitely flexible while still providing the ability to structure information in ways that allow for easy scanning and analysis. And you are much more likely to find that more members of your team will already be familiar enough with a spreadsheet to be able to read it and understand what they are seeing.

If your project team is comfortable with your case management system, and you already have a requirement that all time on projects be tracked there, it may make sense to manage your project activities there.

You can even just use a Microsoft Word or Google Doc document to manage project tasks and activities – as long you structure it in a way that allows all team members to understand the project activities, what is assigned to them, and when it is expected by.

The point is, there is not ever an absolute need to adopt new project management software in order to successfully complete a project. Complex projects like the Hoover Dam were completed not because of slick and complicated software – they were completed because the skilled project managers in charge of overseeing the project employed effective project management techniques. (And they invented groundbreaking new techniques like the Gantt Chart.)

A Simple but Deceptively Powerful Approach: Kanban

You might think that using a word processor or spreadsheet is about as simple as it can get in terms of project management approaches, but many have found that using sticky notes on a wall can be one of the most effective ways to manage a project.

Commonly referred to as the "Kanban" method, the most basic form of this approach is to divide your board or wall into three columns labeled "To Do," "Doing" and "Done," and use sticky notes to represent activities or tasks. Start with all of them in the "To Do" column, in order of priority from top to bottom, and as an activity or task is assigned from the top of the column, put it in the "Doing" column and write the name of the person assigned on the note. When it is done, move the activity or task to "Done". Rinse and repeat. Throughout the life of the project, you may find yourself adding new activities and tasks and reordering them as priorities shift.

One benefit of this approach is that it is immediately intuitive. A Kanban board provides a visual representation of the tasks that need to be completed, the amount of work in progress (in the "Doing" column), and the completed tasks. It is also easy to recognize a throughput problem if there is too much work-in-progress for too few people (most Kanban adherents suggest that each person should only have one item in the "Doing" column at any one time).

The Kanban approach may not be for everyone, and it may not be the most effective approach to managing projects that have strict deadlines and budgets or those that have complex dependencies. It is often used in managing projects or work cycles where priorities change frequently or if there is a need for flexibility in the order that work is done.

And while it may seem simplistic, the Kanban approach is still used today to build complex software or to manage manufacturing production cycles.

To assist you in developing your own Kanban board, use this guide: Kanban Board Guide
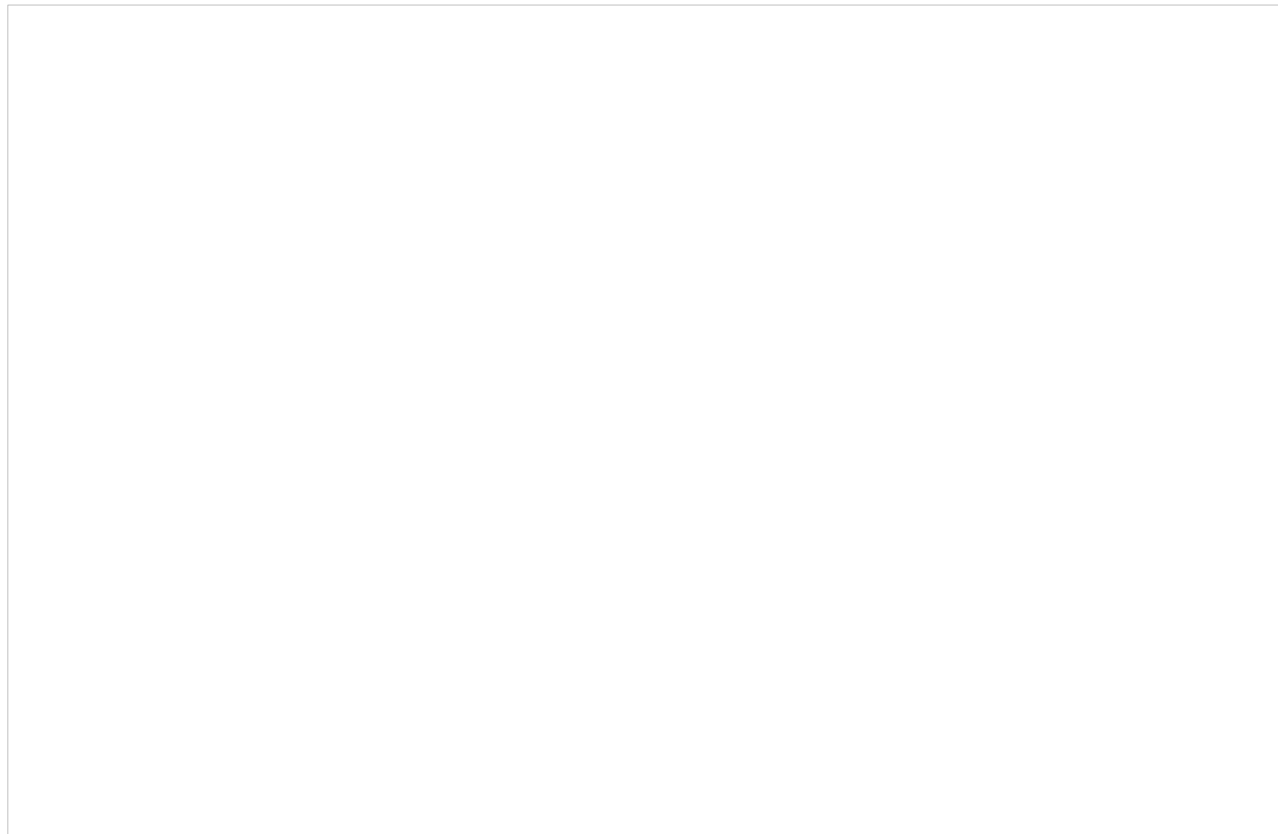
The Case for Adopting New Project Management Software

Sometimes, rolling out a new project management system may make sense if you find that a more basic or analog approach just is not working. You might find that you are tasked with managing multiple similar projects that require you to report progress and metrics across all those projects. Or it may be that your project team is completely remote and distributed, so using sticky notes on a wall, or relying heavily on in-person meetings to coordinate effort, is just not feasible.

There are too many project management systems to list here, and new ones are released on a regular basis. Some project management software has an emphasis on allowing program or portfolio managers to have greater insight into the overall status of all active projects. Other project management tools emphasize ease of use and simplified user interfaces to make adoption easier. Some are more ideally suited to particular industries, like software development or media companies. Here is a quick rundown of some popular ones:

- Microsoft Project
- Microsoft Planner
- Monday.com
- Asana
- JIRA
- Trello

You might even find that no project management system out there really meets all your needs, but you need something more powerful than a spreadsheet. In that case, you can consider building your own project management system using platforms like SharePoint, Salesforce, or AirTable. Setting up project management in these types of platforms is a project unto itself and will require staff and time.

Keeping an Eye on Task Progress

One of the main responsibilities of a project manager during the "Execute" phase is monitoring task progress. We cover this in greater detail in the "Track and Re-Plan" section of this toolkit, but it is worth mentioning here in the context of discussing specific activity and task-tracking tools, because how you prefer to get task updates and progress may influence the choice of which project management approach or tool you use.

It is useful to think of these project management tools or systems in two distinct categories: Tools that make it easy to capture information (i.e., word processing documents, spreadsheets, sticky notes on a wall, etc.), and tools that are highly structured and make it easy to analyze and digest information.

If you find that updates on project activity happens best through regular meetings of the team members, or if you find that there is not much appetite or capacity in the team to set up, learn, and use new software, then project management tools or documents that are flexible and make it easy to add information may make more sense.

If your project is one where team members are clear about what they need to do and how to do it and you do not need frequent "sync-up" project meetings, or if you need a system that delegates responsibility to the team members to provide task updates in a structured manner for easy review and reporting, project management software such as Asana, Monday, or Jira may be the best way to manage your project and track the progress of activities.

Be aware, though, that often there is an inverse relationship between how easy it is for team members to provide information and how easy it is for the project manager to understand key information about task progress overall. For example, the easiest way for a team member to provide an update on the progress or status of a task is a one-on-one conversation. But that requires a lot of effort on the project manager's part to have conversations with individual team members, and if the project manager needs an overall picture of project health, some effort will be needed to document or synthesize the updates in some sort of system or document to provide a comprehensive view. On the other hand, a system like Asana or Jira may allow for the creation powerful reports and dashboards to instantly provide an overview of a project's status on-demand, but there may be a lot of effort expended to train the team on the system, and you may encounter challenges getting the team to use an unfamiliar tool to track information.

Supporting Team Members

One of the project manager's most important roles is to support the project team members to accomplish their assigned activities. If a team member is struggling to complete an activity or task, a project manager needs to identify the reason quickly and take action to address the challenge. If there are external factors, such as a key stakeholder not providing the necessary data or information that team members need to complete their task, then it is exactly the project manager's job to assist in getting that information or help identify an alternative way of completing the task. If the team member is unclear about the completion criteria for the activity or does not fully understand the task they have been assigned, then it is the project manager's job to provide the completion criteria or additional clarity needed.

In situations where a team member just is not the right person to be handling a specific task, it is often helpful to reassign the task and find a task more suitable for that team member.

Are Our Processes Working?

Tinkering with processes during project execution may feel like an ineffective use of your time as a project manager. If you planned effectively, got the right people assigned to the project, and everyone is clear about what they need to be doing, then why would you need to change your processes when the execution phase is about executing?

If your processes are working, then obviously there is no need to make changes. But as a project manager, it is important during the execution phase to take a step back and see if there are ways that your processes (or lack thereof) are a barrier to effectively executing activities and tasks.

If your team is struggling with the steep learning curve for a project management system you have set up and you are finding that you are not getting the input or updates that you need, then maybe it's time to simplify the setup, or switch tactics completely and get project updates in a daily 15-minute stand-up meeting.

If you have established weekly stakeholder update meetings, but you find yourself struggling to create a meaningful agenda with substantive updates that add value from the last time you met, then perhaps it makes sense to propose changing the meetings to every two weeks or once a month.

The point is, the processes you set out at the beginning of a project need to be flexible so you can adapt to the changing and emerging needs of the project, the stakeholders, and the team.

Communication, Communication, Communication

Managing communications is the third key responsibility of a project manager during the execution phase. Communicating with stakeholders and team members throughout the execution phase will ensure that everyone understands the milestones, and risks and issues are mitigated or dealt with. Regular communication also makes it more likely that unspoken assumptions or misunderstandings will be surfaced and addressed before they flare up and become full-fledged issues that can derail your project.

The Project Communication Plan that you created during the planning phase of your project is your guide for how to conduct communications during the execution phase. In the Communication Plan, you should have identified the method and frequency of your communications with project stakeholders, and how you plan to manage team communication. Having a Project Communication Plan in place at the outset of the execution phase will go a long way to managing stakeholder expectations and ensuring that the team knows what to expect as they start executing project activities.

Communicating with Stakeholders

Communicating with stakeholders internally and externally can be done through a variety of ways and in different frequencies. Whether that is through weekly emails, standing meetings, or monthly status updates, the method and frequency must be flexible. As described above, more frequent meetings may work well in the beginning of a project but can be reduced later in the project.

Establishing a medium for communication at the beginning of a project is important. Phone calls, video calls, face-to-face, or emails are all options and can be interchangeable. It is important to choose which is the best medium for both the team and the type of information to be conveyed.

Communicating with the Team

Just like with managing team members and managing your processes, how you communicate with your team depends heavily on the makeup of your team, and the willingness or ability for the team members to adapt to new ways of doing things.

Status Meetings

Internal status meetings are an effective way of fostering communication within the team – particularly if the nature of the project work requires a lot of collaboration and discussion. As with all meetings, preparing an agenda and facilitating the discussion is important to ensure effective use of everyone's time.

In some project management methodologies, status meetings are part of a daily ritual to foster team cohesion and maximize collaboration. For example, the Agile/SCRUM methodology has a daily "stand-up" meeting, typically at the start of the day, during which all team members gather to discuss project activities, review progress, and address any barriers to completing tasks. Stand-up meetings are meant to be short - often, teams will stand during the meeting – and are meant to be a tool for surfacing key information for the team and the project manager.

Whether you decide to implement a daily "stand-up" or opt for weekly or ad hoc project meetings, it is important to regularly evaluate whether the status meetings are serving the intended purpose. Project status meetings may make a lot of sense in the early stages of a project or if the project activities require discussion among team members, but at some point, when tasks and activities are clear, other methods of team communication may be more effective and efficient.

Communicating within the context of your project management tools

Communicating within project management tools can sometimes leave out nuances that video calls can clear up. Automated updates within project management tools are a great way to get an overview of the project as a whole and when applicable, statuses and questions can be asked and answered through the software. Utilizing this tool in combination with other modes of communication helps ensure that the team is in sync.

Within MS Planner, for example, status updates can be set for each task assigned. MS Planner allows functionality for traditional and custom status update markers. Conversations within the tasks allow the team to ask and answer questions with the thread on display for recall at a glance. There are automated notifications for the assignee, assigner, project manager, contributors, and even the whole team at large. Utilizing this project management tool with another mode of communication can keep the team on task, coordinated, and in communication.

In a perfect world, it would be great to know the status of a project at any given moment. The reality is that sometimes team members do not update their tasks, they may experience difficulty with a task and are trying to work through it, or the task is taking longer than estimated. Having standing meetings facilitates receiving updates on the status of a project and the outstanding tasks. Watch this video to learn more about communicating status updates.

pm toolkit kanban board examples

pm toolkit defining and assigning chart

5. Project Management Toolkit: Monitor the Project

Submitted by GravityWorks on Fri, 02/14/2025 - 3:17 PM

Key Question

Once the project is being worked on, the project manager is simultaneously working in two phases of the project: both Work the Project and Monitor the Project. Monitoring the Project addresses the question:

How are we doing?

Embedded within this question are several more discrete questions that help concretize what aspects of the project to monitor. These questions are:

1. Are there any issues or risks to the project that have been identified?
2. Are new goals or work or changes being added to the project?
3. Does the project need to pivot or change course?

Key Activities

Although we call this phase "Monitor the Project", the project manager should be documenting the answers to the discrete questions listed above. There are several key activities that provide documentation structure to support the project manager in monitoring the progress and likelihood of the project achieving its intended outcomes. These activities include:

1. Draft regularly scheduled status reports
2. Document identified issues and risks in an Issues and Risks Log
3. Document changes to the scope of the project in a Change Request Tracker

Project Status Reports

The phases of a project should work hand in hand. The key activities completed in the Initiate the Project phase and the Plan the Project phase laid the foundation for monitoring the project's progress. The Gantt chart already created identifies the milestones of the project within an overall timeline.

Many projects within legal services will have grant funding that requires regular grant reports that address the status of the project. As a result, many projects have built-in monitoring as a condition of the funding. Grant reporting time necessitates taking a step back from the execution to assess the progress.

Although many project managers may need to take this step because of the funding requirements, it is also helpful to consider whether there are other stakeholders, besides the funder, who would benefit from regular status reports.

For example, status reports are a communications tool that can be used to further partner engagement or even engagement on the project internally at the organization. Although status reports may be similar to grant reports in that they both require taking a step back from execution, assessing the progress, and drafting an analysis, status reports are typically a much simpler and less onerous activity.

Using the Gantt chart as a guide, a project manager can compare what the project has accomplished to date to what was planned in the initial Gantt chart. Summarizing this progress, including highlighting the achievements and key contributions of various team members, constitutes a critical part of the status report. If there has not been as much progress to date as the Gantt chart forecasted, the status report provides space to identify the barriers that contributed to this issue and describe how the project manager is responding to those problems. Finally, the status report should succinctly describe the next steps in the project, which serves to focus stakeholders on the upcoming work ahead.

Here is one example of a Status Report that can be used as a template for your project: Sample Status Report

Issues and Risks

The project manager carries a heavy cognitive load. The key activities throughout the phases of the project help relieve this cognitive burden by creating structures to offload the knowledge and awareness of the project manager. By offloading the many pieces of information about the project into a structured document, the project manager carries a lesser burden of trying to remember every single thought as it relates to the project and can instead open a document that has organized these pieces of information in a meaningful and actionable way.

This is especially true for documenting identified risks and issues since these pieces of information may be especially concerning to not only the success of the project, but also to the project manager.

Risks are potential, unrealized problems that could disrupt the project.

Issues are a risk that has been realized.

Here is an Issues and Risks Log template that can be used in your project: Sample Issues and Risks Log

Managing Scope Creep

Every project will at some point in time face a challenge of scope creep. Scope creep can occur in various ways. Additions to the intended outcomes that were identified in the logic model can increase the scope of the project. Additions to the activities identified in the logic model will also increase the scope of the project. Scope creep occurs when the scope increases without intentionality.

The challenge of an increased scope means that the discrete number of resources in terms of staff time and funding must now be spread over a larger scope of work to complete.

The first step in preventing increases in scope is to identify change requests in the project. This requires awareness of how a request comports with the activities identified in the project's logic model. Thus, this logic model continues to serve as a foundation for the project until its completion. When there are additional activities requested to be part of the project that were not identified in the logic model, this should trigger documenting this change request for review. This process prevents "creep" from happening because any changes to scope are made with intention.

Here is a Change Request Log template that can be used in your project: Sample Change Request Log

Changing Course

Changing course or pivoting a project is sometimes necessary to address changes in the environment or from knowledge gained during the implementation. Remember, the goal of the project is achieving the intended outcomes. It is possible that the activities need to pivot to reach those outcomes. Watch this video to learn more about how to handle change requests from stakeholders.

change request tracker

risks and issues log

pm toolkit project status report template

6. Project Management Toolkit: Close the Project

Submitted by GravityWorks on Fri, 02/14/2025 - 3:22 PM

Why do we need a process for closing a project?

The project closing provides assurance that all work has been completed, that all agreed upon activities have been executed and provides formal recognition of the completion of the project – everyone agrees the project has been completed. Project closing can help an organization or project lead avoid miscommunication, conflict, orphaned projects or never-ending projects. Watch this short video to learn more about why closing a project is important.

Key Questions:

1. What needs to be done to finish this project?
2. What did we learn from this project?

When you are developing project planning materials do not forget to plan for the end. Remember projects are temporary and have a beginning and an end. If the project goes on indefinitely, is it a project or something else?

To close the project, we need to understand what the project was, what the goals were, what were the key deliverables and who can sign off on project completion. When initially planning the project, you developed a plan based on the scope of work for the project. The project plan will help you in project closing.

Did you fulfill the project goals and meet objectives?

At this point you should look back at your project planning documents. The project manager, lead or owner will look at each project deliverable and confirm completion or delivery. Conversely the project lead may have done this at the end of each project phase. Final project deliverables may include a final report, budget, website, development of digital content, tech tool and/or delivery of know your rights workshops or train the trainer events. These deliverables may be required by the project funder or sponsor. All deliverables should be reviewed by a project approver who may be the executive director or chief technology officer. Each deliverable should receive sign off and approval. You should keep track of these intermittent approvals and final approvals.

How do you close out the project internally?

Closing the project internally within your office or team is part of the project closing phase. It is important to ensure that projects are closed internally as well as with the project sponsor. You can develop internal documents like a project closing form to develop a checklist of items to demonstrate administrative closing. At the bottom of this page, there is a sample Internal Closing Checklist template that can be used as a starting point.

Now is the time to ensure the project team followed internal project management and governance policies. Internal policies may include developing and following project plans and saving documents in the appropriate document management repository whether a shared drive or cloud-based application like SharePoint, DropBox, Google Drive etc.

Consider any relevant documents that must be filled out or sent to project stakeholders and ensure there is a copy in your document repository. It might be helpful to have an internal meeting to close the project with the project team using the project closing checklist.

Many times, when we finish a project, we don't dedicate time to celebrate. Many (accidental and professional) project managers have multiple projects and limited time. However, if you do not take time to celebrate your successes this can lead to burnout. Celebrate as big or small as your team needs but do not forget to thank team members for their efforts and acknowledge what you all achieved. Watch this video to learn more about what the success of a project looks like.

Post-Mortem

This may sound morbid, but we are evaluating our work on a now closed (dead) project. Remember projects are timebound. This is the time to document any lessons learned. Try not to wait too long to do this since there are things you may forget. You may also want to keep a list of lessons as you learn them. Schedule a final project meeting to discuss what went well and what did not go well. What changes to our approach would benefit future projects? Did we develop any new processes during this project such as (requesting sign off at end of each phase)? Did we develop any new templates, samples or work products that can and should be used in future similar projects? Make sure that this information is shared and available for future project leads/staff who may lead a similar project. This time is not to place blame for mistakes but to reflect as a team.

Here are examples of lessons learned during a project:

- Weekly project status reports worked well to maintain open communication.
- The new project planning document helped keep the project moving forward.
- Having J speak with the sponsor to clarify project goals and objectives improved workflow.

- Roles were not clearly defined.
- We did not include the right people on the team, or our team did not represent the people we hoped to serve as a project outcome.
- We paid our contractors late and incurred late fees.

To systematically memorialize the lessons learned from each project that will contribute to the institutional knowledge of the program, the project manager can develop an organization-wide Lessons Learned Repository that current and future project managers can contribute to during the closing of a project. Here are foundational questions to start this endeavor:

- What was done well and should be documented to repeat in future projects?
- What could have been improved? How could it have been improved?
- Were there any new processes developed?
- Were there adequate resources for the project in terms of personnel, technology, and software?

- Did any issues arise outside of the team's control?

Not all lessons will be for all future projects, but you are building internal memory, demonstrating to the project team that their feedback matters, teaching that this is a learning environment and making sure knowledge does not just live in one project leader or one team's collective brain.

pm toolkit project closing checklist