L.E.A.D
Project Management: Taking Initiative and Being Accountable

Date: 3/19/21
Presented By

Molly Cook

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- BS in Sociology and Theology – Aquinas College
- MS in Sociology – Illinois State University
- Background in non-profit development, economic development and homelessness
April 16, 2021
9-10am
Manage Your Schedule Like a Boss: *The Art of Delegation and Saying No*
Sign up here.
Poll

How many of you are on teams that, more often than not, reach their deadlines and goals?
Thinking back on past teams you’ve been a part of, what is one thing a project manager, coach, or leader has done well to motivate your team or keep you on track?
Agenda

- Project Lifecycle
- Tips for each phase of the project lifecycle
- Resources
Project Lifecycle

Initiation → Planning → Execution → Closure

Click here for the source and further information
Pre-Phase 1

- Talk to others
- Research other programs/groups that complete similar work
- Consider your work style

> Who do I work well with?
> Why do I care about this topic/cause?
> What time do I have to give to this project?
“Self awareness and self love matter. Who we are is how we lead.”

-Brené Brown, Dare to Lead, pg.11
What steps do you usually take prior to joining a team or taking on a project manager/staff role?

Are there any that you wish you did?
Phase 1: Initiation

- Deliverables
- Objectives (Charges/Priorities)
- Stakeholders
- Time
- Budget
- Scope
- Team Members
- Risks
- Success Criteria

- Define the vision/mission
- Create a structure (workgroups)
- Set deadlines
- Determine budget, staff, and members
EQUITY TASK FORCE WORKGROUP GUIDE

Data Analysis Workgroup
Assessing, analyzing, and recommending education and workforce tools that can track program access and outcomes and disaggregate data to reveal disparities in policies and program delivery.

Policy Workgroup
Examining programs, policies, and practices to infuse issues of equity and inclusion into these programs, policies, and practices as authorized by law.

Program Workgroup
Making recommendations regarding inclusive and diverse approaches, including professional development of staff, to ensure use of an equity lens in serving their diverse populations.

Target Populations as our scope: Women, rural residents, people of color, individuals with disabilities, veterans, justice-impacted populations, immigrant populations, LGBTQ community, homeless and homeless youth, low income individuals, foster care youth and alumni, migrant and seasonal workers, individuals working to achieve their high school equivalency, persons receiving public assistance, individuals who are basic skills deficient.

Framework and Approach:

Organize
the information under review

Explore
what you’re reviewing to see what works and what can be improved

Discover
what changes can be made short-term, mid-term, and long-term. Which partners do you need?

Select
the changes the Task Force would like to see

Act
by piloting the priorities and beginning work

Evaluate
recommendations and implementation to provide accountability
“A cognitive quirk called the planning fallacy leads us to consistently underestimate how long it will take us to complete a project”

Source: BBC
"The strength of the team is each individual member. The strength of each member is the team."

- Phil Jackson
## Four Domains of Team Strength

<table>
<thead>
<tr>
<th>EXECUTING</th>
<th>INFLUENCING</th>
<th>RELATIONSHIP BUILDING</th>
<th>STRATEGIC THINKING</th>
</tr>
</thead>
<tbody>
<tr>
<td>People with dominant Executing themes know how to make things happen.</td>
<td>People with dominant Influencing themes know how to take charge, speak up, and make sure the team is heard.</td>
<td>People with dominant Relationship Building themes have the ability to build strong relationships that can hold a team together and make the team greater than the sum of its parts.</td>
<td>People with dominant Strategic Thinking themes help teams consider what could be. They absorb and analyze information that can inform better decisions.</td>
</tr>
<tr>
<td>Achiever</td>
<td>Activator</td>
<td>Adaptability</td>
<td>Analytical</td>
</tr>
<tr>
<td>Arranger</td>
<td>Command</td>
<td>Connectedness</td>
<td>Context</td>
</tr>
<tr>
<td>Belief</td>
<td>Communication</td>
<td>Developer</td>
<td>Futuristic</td>
</tr>
<tr>
<td>Consistency</td>
<td>Competition</td>
<td>Empathy</td>
<td>Ideation</td>
</tr>
<tr>
<td>Deliberative</td>
<td>Maximizer</td>
<td>Harmony</td>
<td>Input</td>
</tr>
<tr>
<td>Discipline</td>
<td>Self-Assurance</td>
<td>Includer</td>
<td>Intuition</td>
</tr>
<tr>
<td>Focus</td>
<td>Significance</td>
<td>Individualization</td>
<td>Learner</td>
</tr>
<tr>
<td>Responsibility</td>
<td>Woo</td>
<td>Positivity</td>
<td>Strategic</td>
</tr>
</tbody>
</table>
16 Personalities

**ANALYSTS**
Intuitive (N) and Thinking (T) personality types, known for their rationality, impartiality, and intellectual excellence.
- Architect (INTJ)
- Logician (INTP)
- Commander (ENTJ)
- Debater (ENTP)

**DIPLOMATS**
Intuitive (N) and Feeling (F) personality types, known for their empathy, diplomatic skills, and passionate idealism.
- Advocate (INFJ)
- Mediator (INFP)
- Protagonist (ENFJ)
- Campaigner (ENFP)

**SENTINELS**
Observant (S) and Judging (J) personality types, known for their practicality and focus on order, security, and stability.
- Logician (ISTJ)
- Defender (ISFJ)
- Executive (ESTJ)
- Consul (ESFJ)

**EXPLORERS**
Observant (S) and Prospecting (P) personality types, known for their spontaneity, ingenuity, and flexibility.
- Virtuoso (ISTP)
- Adventurer (ISFP)
- Entrepreneur (ESTP)
- Entertainer (ESFP)
Consider the roles that members tend to take on including task, relationship, and disruptive roles.

**Task Roles**
- Information seeker/giver
- Organizer
- Clarifier
- Elaborator
- Evaluator
- Initiator

**Relationship Roles**
- Gatekeeper
- Harmonizer
- Tension Reliever
- Supporter

**Disruptive Roles**
- Blocker
- Avoider
- Credit Seeker
- Distractor
- Dominator

*Know Your Role!*
When you are on a team, how do you get to know the strengths of your teammates?
**Phase 2: Planning**

Create a workplan

Develop a system

Create workgroups

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**ATTACHMENT I - PROJECT IMPLEMENTATION PLAN**

*Note that successful grantees will be required to develop a more complete workplan.*

List the major project activities in the first column. In the second column, indicate the timelines for completion of the activities. Timelines may be specified by the month of the project (e.g., such as month 1, month 2, etc.) or by specific dates. In the third column, indicate the staff by name and title responsible for performing the activities, and indicate the organizational affiliation of each staff person listed. The fourth column must describe the deliverable associated with the project activity. [Expand the table as needed.]

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>TIMELINE</th>
<th>RESPONSIBLE STAFF</th>
<th>DELIVERABLE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

**Sample plan from workNet**
**Workplan**

**Incorporate charges and priorities**

**Consider the steps to achieve each charge and priority**

**Determine the realistic time allotment you and group members have**

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**Mission**

Create an evaluation framework for the WIOA system including evaluation elements of policies, programs, and processes created or overseen by the IWIB to be used by the WIOA system.

<table>
<thead>
<tr>
<th>Description</th>
<th>Expected Outcome</th>
<th>Activities</th>
<th>Deliverable</th>
<th>Target Delivery Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a draft framework based on the DOL 2020 Evaluation Toolkit</td>
<td>All Workgroup members provide feedback on the document</td>
<td>Determine additions to the document, including fillable forms, executive summary, and definitions</td>
<td>Draft Illinois Evaluation Framework/Toolkit</td>
<td>April 2021</td>
</tr>
<tr>
<td></td>
<td>Make edits based on workgroup, CIC feedback, and equity definition from Equity Task Force</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pilot the evaluation of programs, policies and processes using the framework</td>
<td>Identify 6 programs, policies, and processes to pilot using the framework</td>
<td>Assign workgroup members to pilots as 'point persons' for communication and assistance</td>
<td>Models and examples of utilizing the Evaluation Framework</td>
<td>September 2021</td>
</tr>
<tr>
<td></td>
<td>Create a process to solicit feedback from the pilots</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Present to the IWIB a final Evaluation Framework</td>
<td></td>
<td>Edit framework based on pilot results/suggestions</td>
<td>Evaluation Framework for the IWIB</td>
<td>October 2021</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Present edited framework to full CIC</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Present edited framework to WIOA partners for feedback</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Present framework to the IWIB for adoption</td>
<td></td>
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<tr>
<td>Disseminate the Evaluation Framework to WIOA partners</td>
<td></td>
<td>Share with all WIOA Partners</td>
<td>A working Evaluation Framework</td>
<td>December 2021</td>
</tr>
</tbody>
</table>
Example

**Drivers:**
Execute a customer centered design service delivery model
Better prepare staff to effectively serve business and individual customers
Demonstrate a business-demand driven orientation and establish strong business partnerships
Funding opportunity for piloting best practices in Equity work

**Anchors**
Integrated business services framework for state and regional workforce and economic development programs
Cross-Agency development of staff and WIOA system stakeholders
Expand access to information and resources
Establish direct relationships among diverse stakeholders

**Expected Outcomes**
Identification of best practices in equity-based decision-making among organizational leadership and in service delivery
Identification of best practices for assessing performance and performance metrics in evaluating organizational capacity and service delivery
Identification of strategies and programs for providing high-quality professional training
Develop a System

How will you communicate as a team?

- Teams
- Calendar Invites
- Google Drive
- Group Me
- Stand Up Meeting
- Run of Show
## Run of Show Example

<table>
<thead>
<tr>
<th>Time (AM)</th>
<th>Presenter/Actor</th>
<th>Activity</th>
<th>Pass to Next</th>
<th>Tech Action</th>
<th>Video</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:10</td>
<td>Molly/Sarah</td>
<td>Confirm Zoom is working</td>
<td></td>
<td>Check Zoom phone and video</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sarah</td>
<td>Controls PowerPoint</td>
<td></td>
<td>PowerPoint</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Terah</td>
<td>Monitors Chats</td>
<td></td>
<td>Chats</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Molly</td>
<td>Make Sarah, Jeannette co-hosts</td>
<td></td>
<td>Co-Host</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td>8:15</td>
<td>ALL</td>
<td>All Core Team Arrives</td>
<td></td>
<td>Login to Zoom</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td>8:30</td>
<td>Molly</td>
<td>Block William, Ryan, Sara, Zoom</td>
<td></td>
<td>Start Track</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What tools do you like to use for project management?
Create workgroups

- Organize the information under review
- Explore what you're reviewing to see what works and what can be improved
- Discover what changes can be made short-term, mid-term, and long-term. Which partners do you need?
- Select the changes the Task Force would like to see
- Act by piloting the priorities and beginning work
- Evaluate recommendations and implementation to provide accountability

Set charges & priorities.

An opportunity for members to have increased leadership

An opportunity for members to use specific skills sets
Phase 3: Execution

- Include goals and next steps in all agendas and notes
- Check-in with workgroups and members
- Pilot Test

“Daring leaders must care for and be connected to the people they lead.”

-Brené Brown, Dare to Lead, pg. 12
Phase 4: Closure

- Evaluate your progress
- Should the work carry on?
- Ask for member evaluations.
- Express appreciation
Conclusion

Be realistic in time expectations
Check-in with members
Determine communication methods early

For resources, links, and ideas visit this Padlet.
Questions?