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# Project Management Worksheet

## Overview

This tool can be used to support implementation of tactics from the study *Tackling Student Stress*. It will help you build and manage a project team, establish milestones, track progress, and report results.

## Tool contents and intended audience

This tool consists of a six-page set of project management tasks. These worksheets are intended for the project lead.

## *Tool Implementation Guide*

### Project Management Worksheet

Fill in each section according to the instructions and resources provided.

- *Project Cover Page*: Begin by defining the key problem to address, analyzing the root cause of the problem, and identifying appropriate solutions. Establish who will be on the project team.
- *Project Timeline*: List the project milestones and identify an appropriate timeline by which to achieve each milestone. Then, map major milestones onto the project timeline chart. Add the major milestones to the Project Cover Page.
- *Project Tasks*: Use the task worksheets to secure stakeholder buy-in, manage people and processes, and measure project success. Add project success metrics to the Project Cover Page.
- *Project Evaluation*: Use template PowerPoint slides to present the results of the project. The presentation should be structured in three parts: problem, process change, results.

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### **Targeted Root Cause:**

Use the [Root Cause Analysis Template](#) to uncover organization-specific root causes of a particular problem. Please detail which root cause you will target for change and improvement.

### **Best Practice Solution:**

Please refer to the study *Tackling Student Stress* to select a practice which will address the root cause of the problem.

#### *Project Team*

1. Project Lead:
2. Project Team Member(s):

#### *Defining Success*

1. Choose easily measurable success metrics (*e.g., level of student stress after implementing a homework rating system*)
2. Where possible, find a way to quantify your metrics (*e.g., assign a numerical value to stress levels*)
3. Establish a mechanism for assessing the metrics (*e.g. digitally distributed Survey*)

#### *Metrics and Assessment Methods*

1. Add first metric and assessment method
2. Add second metric and assessment method
3. Add third metric and assessment method

# Project Timeline: Roadmap Process Goals

## Define Process Goals and Timeline

List the project milestones below and identify an appropriate timeline by which to achieve each milestone. Then, map major milestones onto the project timeline chart.

### Project Milestones



Project Milestones	Date
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

# Project Task List: Secure Stakeholder Buy-In

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## *Ensure Project Support*

Below, list the specific tasks required to secure buy-in from all stakeholders. Then, assign these tasks to the most appropriate team member, and clearly define each task's goal and deadline.

Use the [Disruptive Stakeholder Diagnostic](#) to distinguish between stakeholders who are displaying typical resistant behavior from those trying to sabotage the initiative based on diagnostic results. Based on the diagnostic results, learn communication techniques to confront disruptive behavior.

## Secure Stakeholder Buy-In

Task	Task Owner	Goal	Deadline
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.
4.	4.	4.	4.
5.	5.	5.	5.
6.	6.	6.	6.

# Project Task List: Enable People and Processes

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## *Manage Project Team and Process*

Below, list the specific tasks required to both retrain staff in new process and operationally redesign current process. Then, assign these tasks to the most appropriate team member, and clearly define each task's goal and deadline.

### **Enable People and Processes**

<b>Task</b>	<b>Task Owner</b>	<b>Goal</b>	<b>Deadline</b>
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.
4.	4.	4.	4.
5.	5.	5.	5.
6.	6.	6.	6.

# Project Task List: Measure Project Success

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## *Measure Progress*

Below, list the specific mechanism to be used to evaluate the project, and identify metrics to track and capture appropriate data. Then, assign these tasks to the most appropriate team member, and clearly define each task's goal and deadline.

### **Measure and Assess Progress**

<b>Mechanism/Metric</b>	<b>Owner</b>	<b>Goal</b>	<b>Deadline</b>
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.
4.	4.	4.	4.
5.	5.	5.	5.
6.	6.	6.	6.

# Project Task List: Measure Project Success

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## *Compile Results Report*

Use template PowerPoint slides to present the results of the project. The presentation should be structured in three parts: problem, process change, results.

*Note: The template deck includes multiple options for certain slide styles. Delete any unused template slides.*

**Questions? Please email the Independent School Executive Forum at [isef@eab.com](mailto:isef@eab.com) for further guidance and assistance with your project planning.**