Time Management and Productivity, Proposal Development, and Project Management Tools

Bill Michener

New Mexico EPSCoR State Office

Road map

- Personal
  - Time Management and Productivity
- Projects
  - Proposal Development
  - Project Management Tools

The Most Difficult Word in the English Language

no

I. Time Management/Productivity

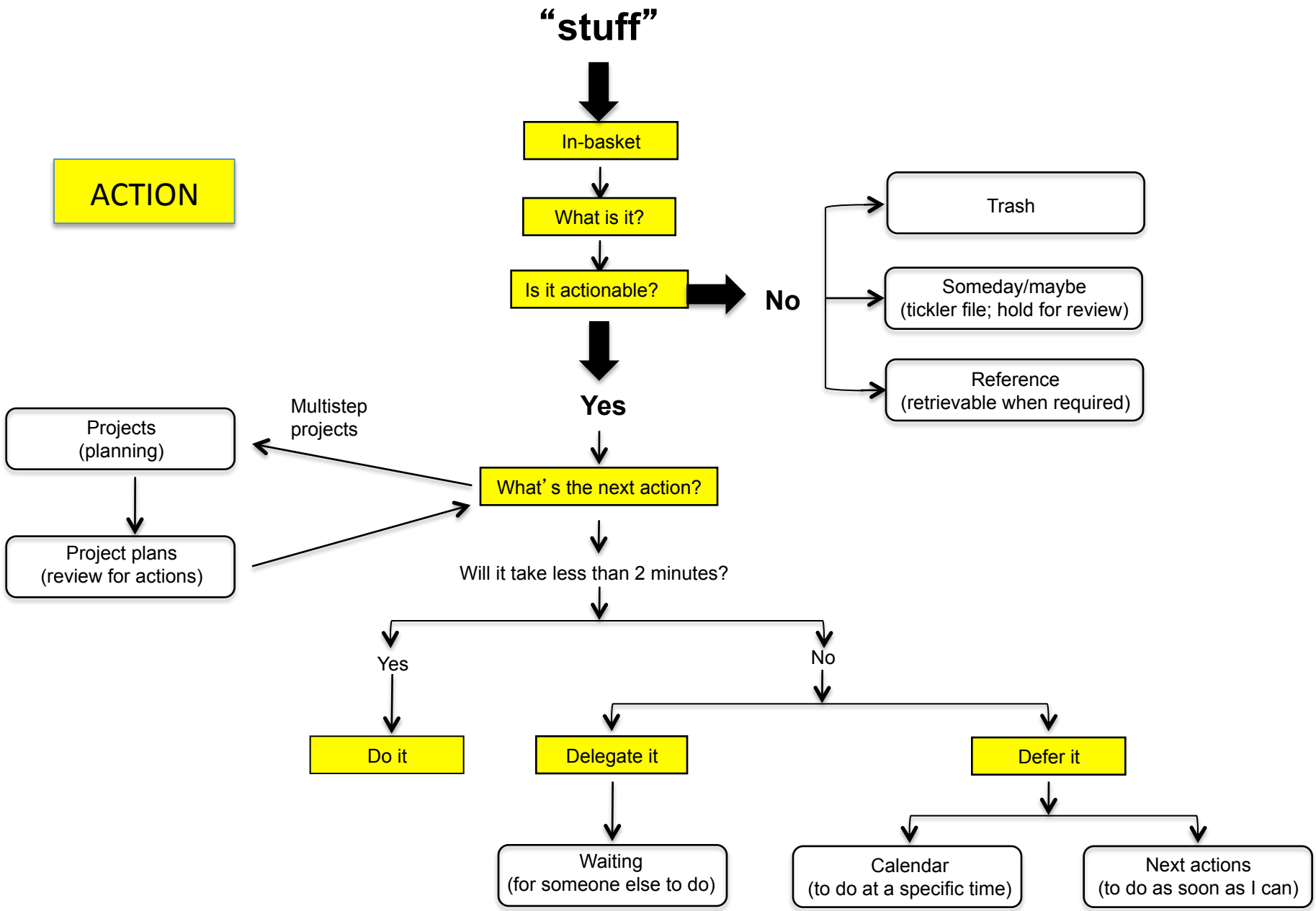
- 7 Lessons from "Getting Things Done" by David Allen
- My approaches:
  - Desktop
  - Calendars
  - To do lists
  - E-mail management
  - File management
- Your approaches

"Getting Things Done"

- Lesson 1 (**prepare**)
  - Set aside time
    - 3 hrs to 1-2 days, initially (***desktop**, one file drawer, room in house, etc.)
    - 1 hr /week, thereafter
  - Get your hardware in place
    - File folders
    - In-boxes or in-baskets
    - List management system
    - Calendaring/scheduling system
  - Create a personal filing system (see 114-117)

“Getting Things Done”

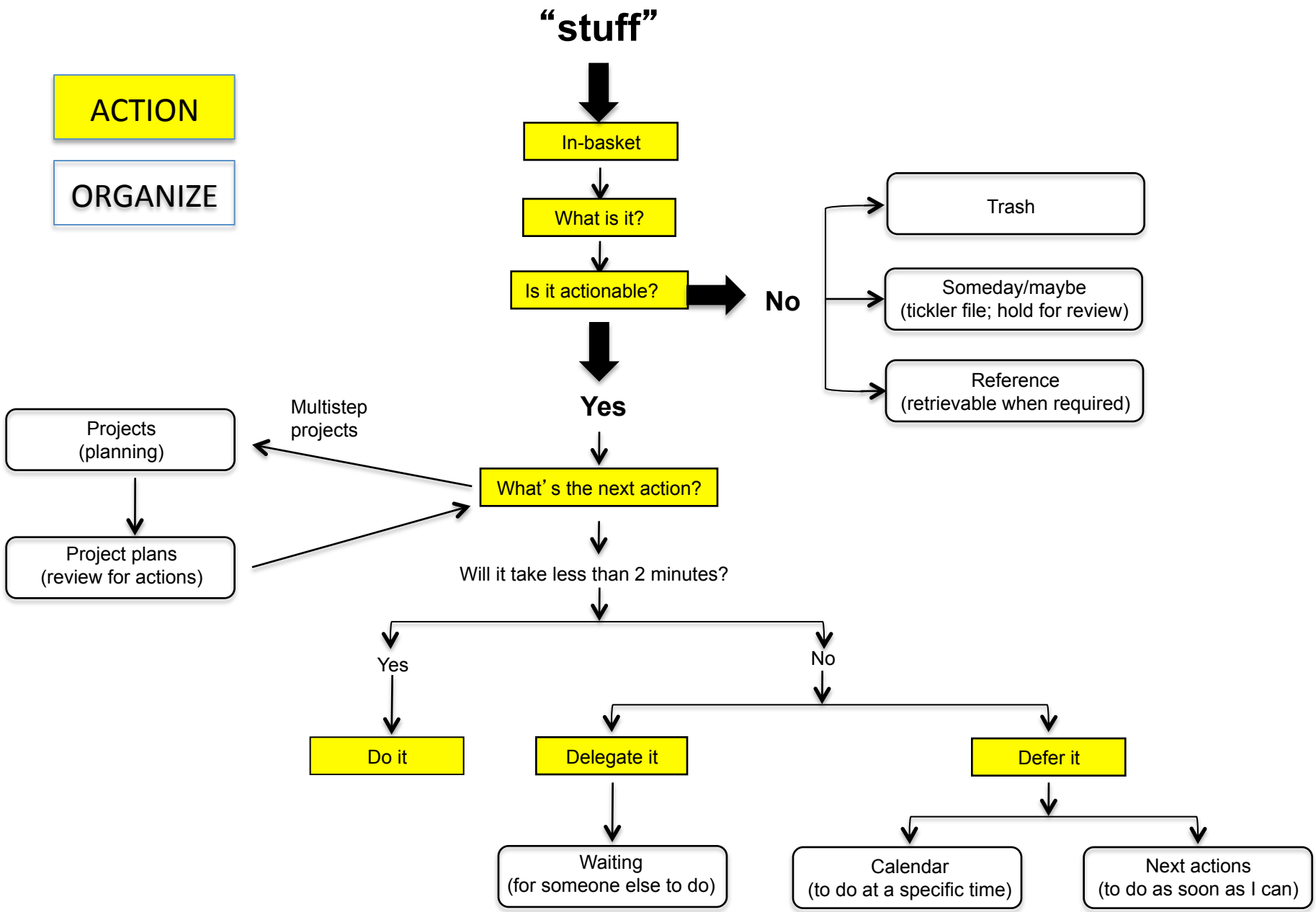
- Lesson 2 (**act**; page 32):
  - Do it
  - Delegate it or
  - Defer it



From David Allen – Getting Things Done 2001

"Getting Things Done"

- Lesson 3 (**organize**; pages 139 and 140):
  - Seven types of things to track and manage:
    - "Projects"
    - Project support material
    - Calendared actions and information (e.g., a meeting)
    - "Next actions"
    - "Waiting for" list
    - Reference material
    - "Someday/maybe" list



From David Allen – Getting Things Done 2001

“Getting Things Done”

- Lesson 4 (**create action reminders**; page 144):
  - Organize actions by context
    - “calls”
    - “at computer”
    - **“errands”**
    - **“office actions”**
    - **“at home”**
    - **“agendas”**
    - **“read/review”**

"Getting Things Done"

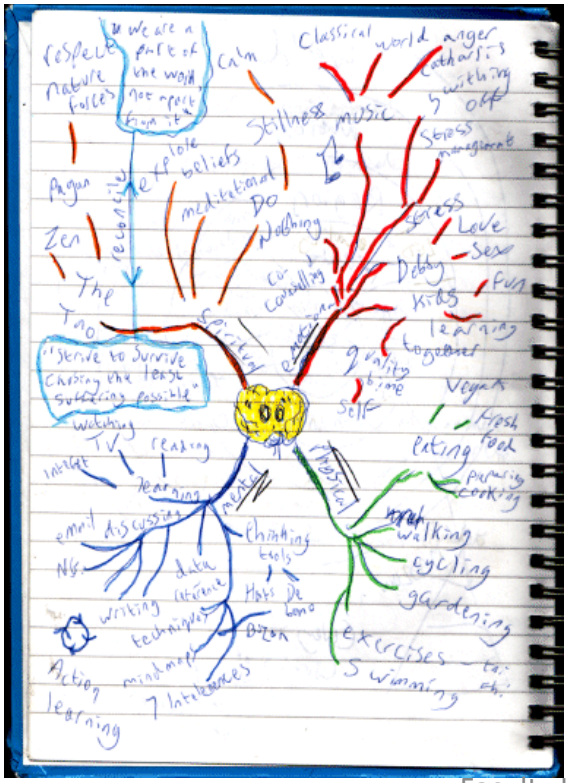
- Lesson 5 (**getting e-mail/in-box to empty**; page 152):
  - Re-use personal filing system approach (e.g., by projects)
  - Add:
    - @ACTION
    - @WAITING FOR
  - See lesson 2 (do it, delegate it, defer it, OR delete it)

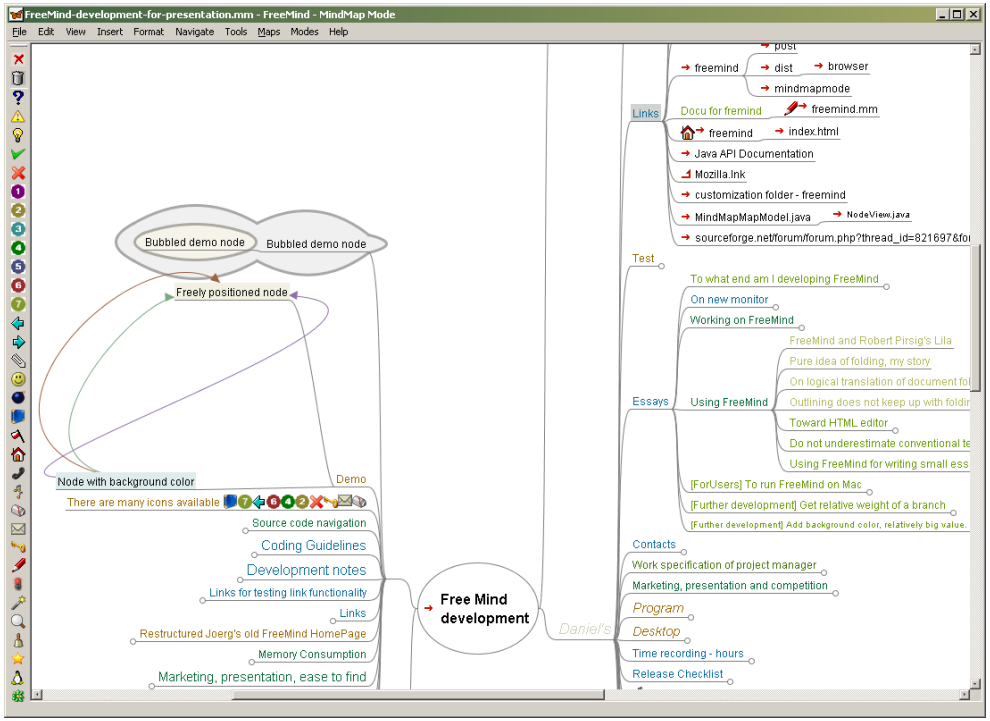
“Getting Things Done”

- Lesson 6 (**review weekly**—”empty your head”; page 184):
  - Loose papers—collect in in-box for processing
  - Notes
  - Previous and upcoming calendar
  - Review “projects”
  - Review “next actions”
  - Review “waiting for”
  - Review “someday/maybe” list

“Getting Things Done”

- Lesson 7 (**plan**; page 71):
  - Capture your ideas
    - Mind-mapping is a strategy that works





“Getting Things Done”

1. Prepare
2. Act
3. Organize
4. Create action reminders
5. Empty your inbox (get email to empty)
6. Empty your head (review weekly)
7. Plan

My approaches

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Richardson Withdraws as Commerce Nominee

Gov. Bill Richardson withdrew his nomination as commerce secretary amid a grand jury investigation into the awarding of a state contract in New Mexico.

- With Senate Set to Return, Uncertainty Over Obama's Seat
- The Caucus: Lawmakers Say Stimulus Package May Be Delayed
- Israeli Troops Advance, Bisecting Gaza
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Date & Time

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See Before You Die - Place of the Day

Lake Roosevelt (ALASKA), UNITED STATES

The other side of those cold Alaska nights is the unbelievable light afforded by the midnight sun.

Add your place

Pretty Costa Rica Ladies
Are Waiting For A Real Man Marry Costa

Toodledo - Your to-do list

Toodledo A powerful, easy

Wikipedia

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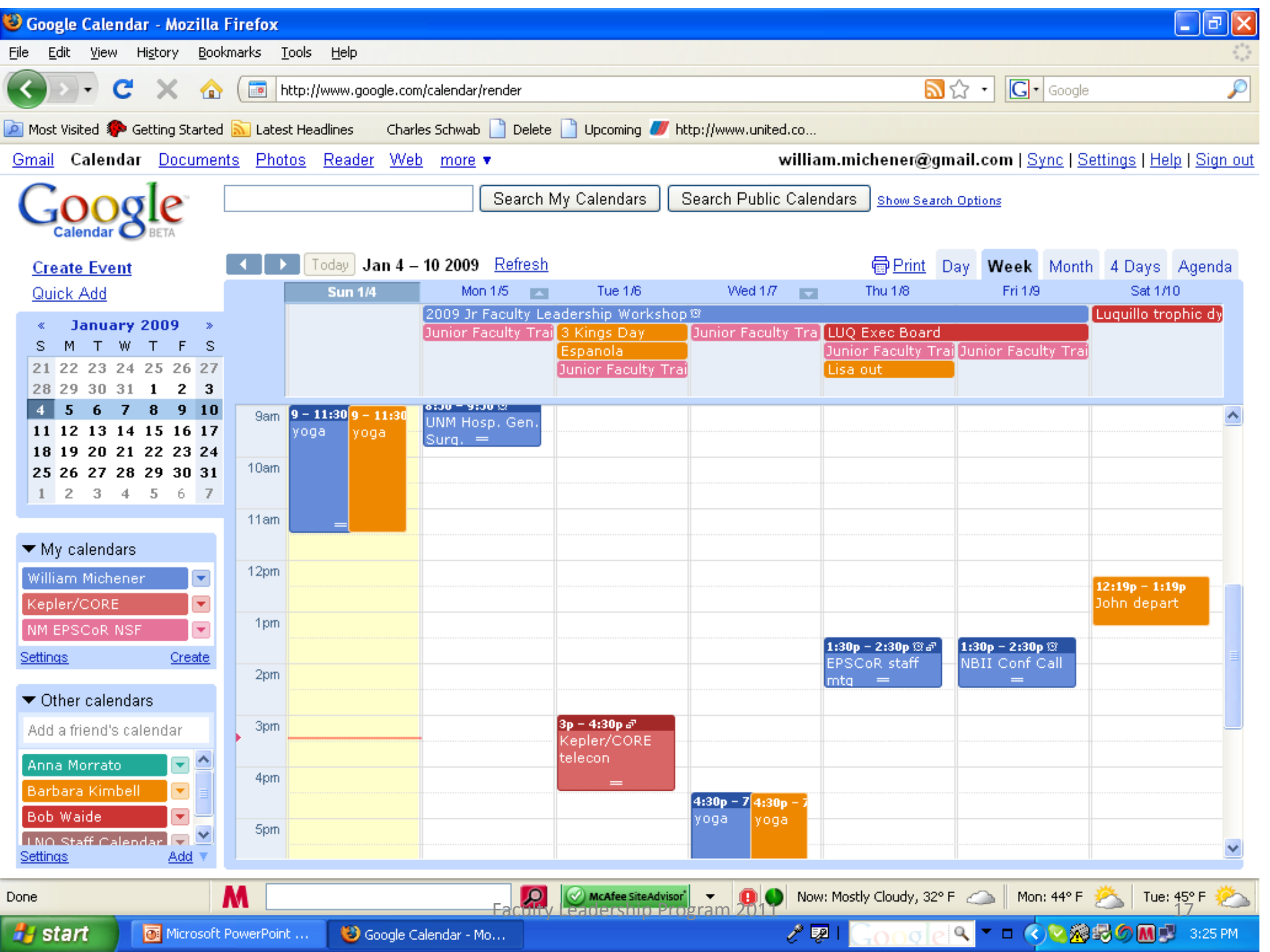
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9 – 11:30 yoga
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1:30p – 2:30p EPSCoR staff mtg
1:30p – 2:30p NBII Conf Call
3p – 4:30p Kepler/CORE telecon
4:30p – 7 yoga
4:30p – 7 yoga
My calendars
William Michener
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Other calendars
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Anna Morrato
Barbara Kimbell
Bob Waide
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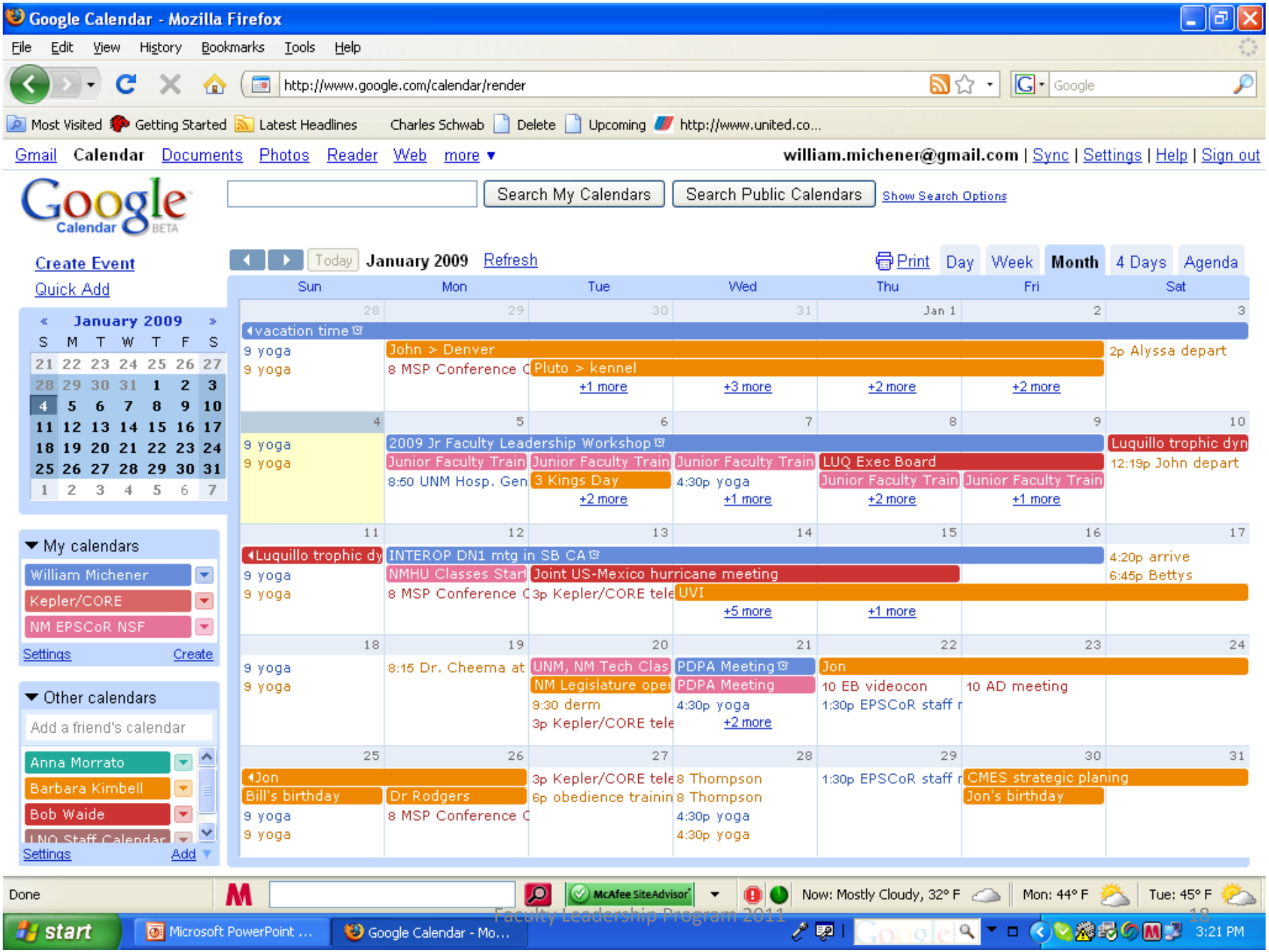
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9:30 derm
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6p obedience trainin
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Add a friend's calendar
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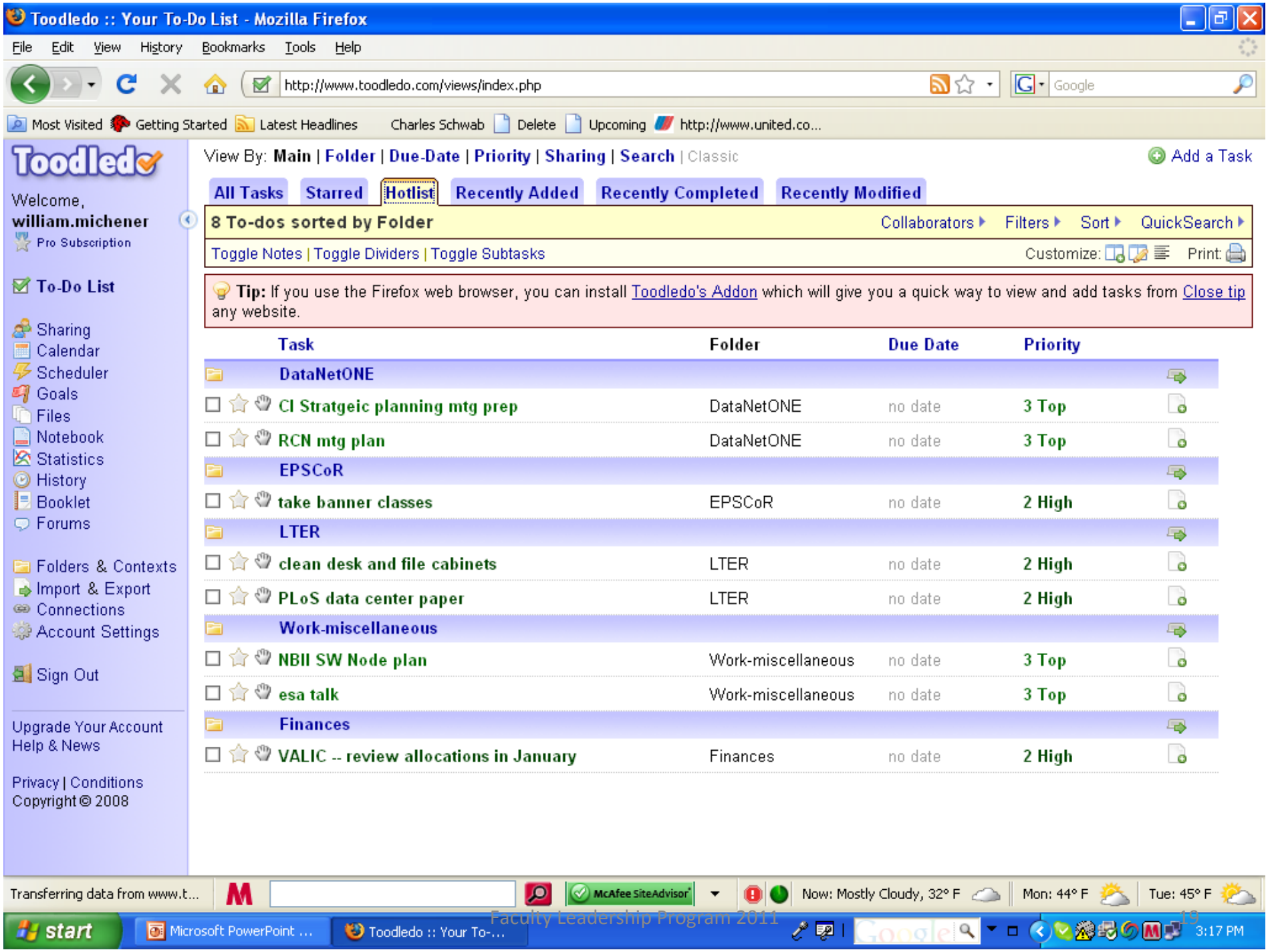
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Upgrade Your Account
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View By: Main | Folder | Due-Date | Priority | Sharing | Search | Classic
Add a Task
All Tasks Starred Hotlist Recently Added Recently Completed Recently Modified
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Tip: If you use the Firefox web browser, you can install Toodledo's Addon which will give you a quick way to view and add tasks from any website. Close tip
Task Folder Due Date Priority
DataNetONE
CI Stratgeic planning mtg prep DataNetONE no date 3 Top
RCN mtg plan DataNetONE no date 3 Top
EPSCoR
take banner classes EPSCoR no date 2 High
LTER
clean desk and file cabinets LTER no date 2 High
PLoS data center paper LTER no date 2 High
Work-miscellaneous
NBII SW Node plan Work-miscellaneous no date 3 Top
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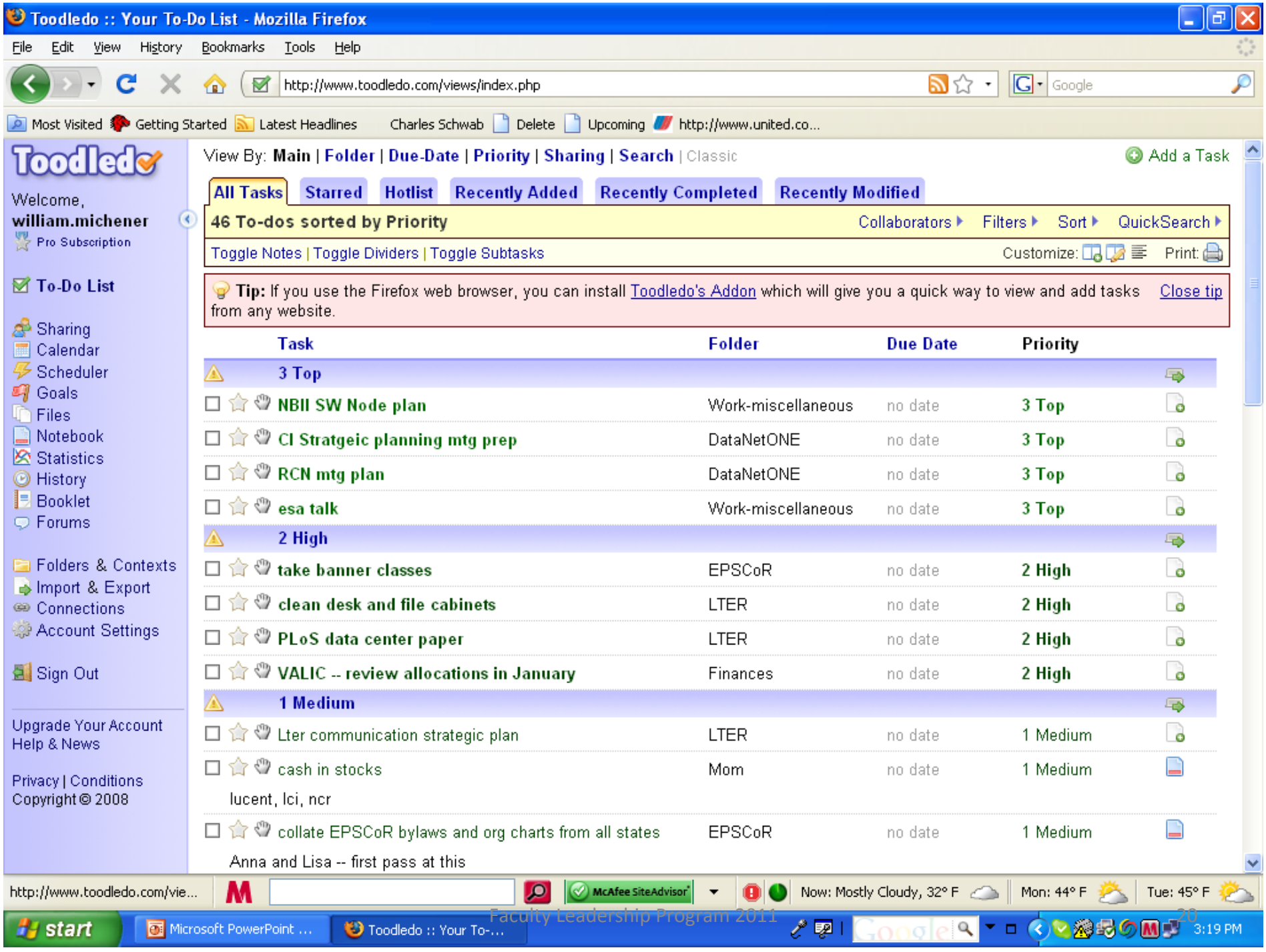
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Now: Mostly Cloudy, 32° F
Mon: 44° F
Tue: 45° F
start
Microsoft PowerPoint ...
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Poll: January Meeting of DataONE External Advisory Board

Summary: 13 participants, 0 comments more ...

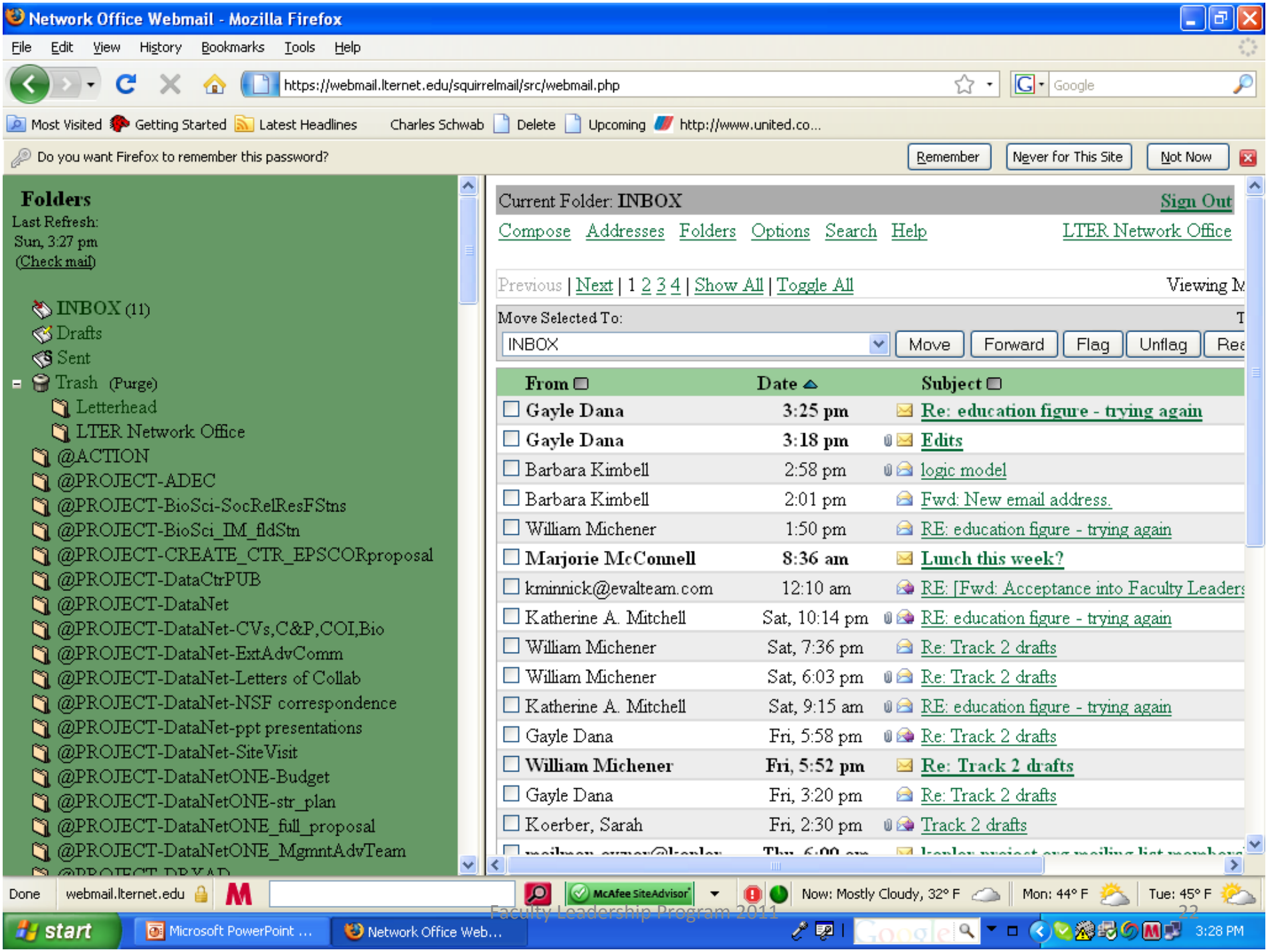
William Michener has created this poll.

"Please select preferred 2-day meeting periods for the next in-person meeting the Board. The Board voted to hold the next meeting in Santa Fe, New Mexico (which has limited flights to/from Dallas and Los Angeles, but is also only an hour from Albuquerque which has numerous flights daily from many locations)."

Time zone: America/Denver Update

Switch to calendar view »

	January 2011														
	Thu 6	Fri 7	Mon 10	Tue 11	Wed 12	Thu 13	Fri 14	Mon 17	Tue 18	Wed 19	Thu 20	Fri 21	Mon 24	Tue 25	Wed 26
	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM	8:30 AM – 5:00 PM
William Michener	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK
Martha Maiden			(OK)	(OK)	(OK)	(OK)	(OK)		(OK)	(OK)	(OK)		(OK)	(OK)	(OK)
Clifford Lynch								OK	OK	OK	(OK)		OK	OK	OK
Paul Risser	OK	OK	OK	OK	(OK)	OK	OK	OK	OK	(OK)	OK	OK	OK	OK	(OK)
Kevin Guthrie	OK	OK						OK	OK	OK	OK	OK	OK	OK	OK
Tony Hey	OK	OK							(OK)	OK	OK				
Adrian Burton													(OK)	(OK)	OK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@PROJECT-BioSci-SocRelResFStns
@PROJECT-BioSci_IM_fldStn
@PROJECT-CREATE_CTR_EPSCORproposal
@PROJECT-DataCtrPUB
@PROJECT-DataNet
@PROJECT-DataNet-CVs,C&P,COI,Bio
@PROJECT-DataNet-ExtAdvComm
@PROJECT-DataNet-Letters of Collab
@PROJECT-DataNet-NSF correspondence
@PROJECT-DataNet-ppt presentations
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Gayle Dana 3:25 pm Re: education figure - trying again
Gayle Dana 3:18 pm Edits
Barbara Kimbell 2:58 pm logic model
Barbara Kimbell 2:01 pm Fwd: New email address.
William Michener 1:50 pm RE: education figure - trying again
Marjorie McConnell 8:36 am Lunch this week?
kminnick@evalteam.com 12:10 am RE: [Fwd: Acceptance into Faculty Leaders
Katherine A. Mitchell Sat, 10:14 pm RE: education figure - trying again
William Michener Sat, 7:36 pm Re: Track 2 drafts
William Michener Sat, 6:03 pm Re: Track 2 drafts
Katherine A. Mitchell Sat, 9:15 am RE: education figure - trying again
Gayle Dana Fri, 5:58 pm Re: Track 2 drafts
William Michener Fri, 5:52 pm Re: Track 2 drafts
Gayle Dana Fri, 3:20 pm Re: Track 2 drafts
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Now: Mostly Cloudy, 32° F
Mon: 44° F
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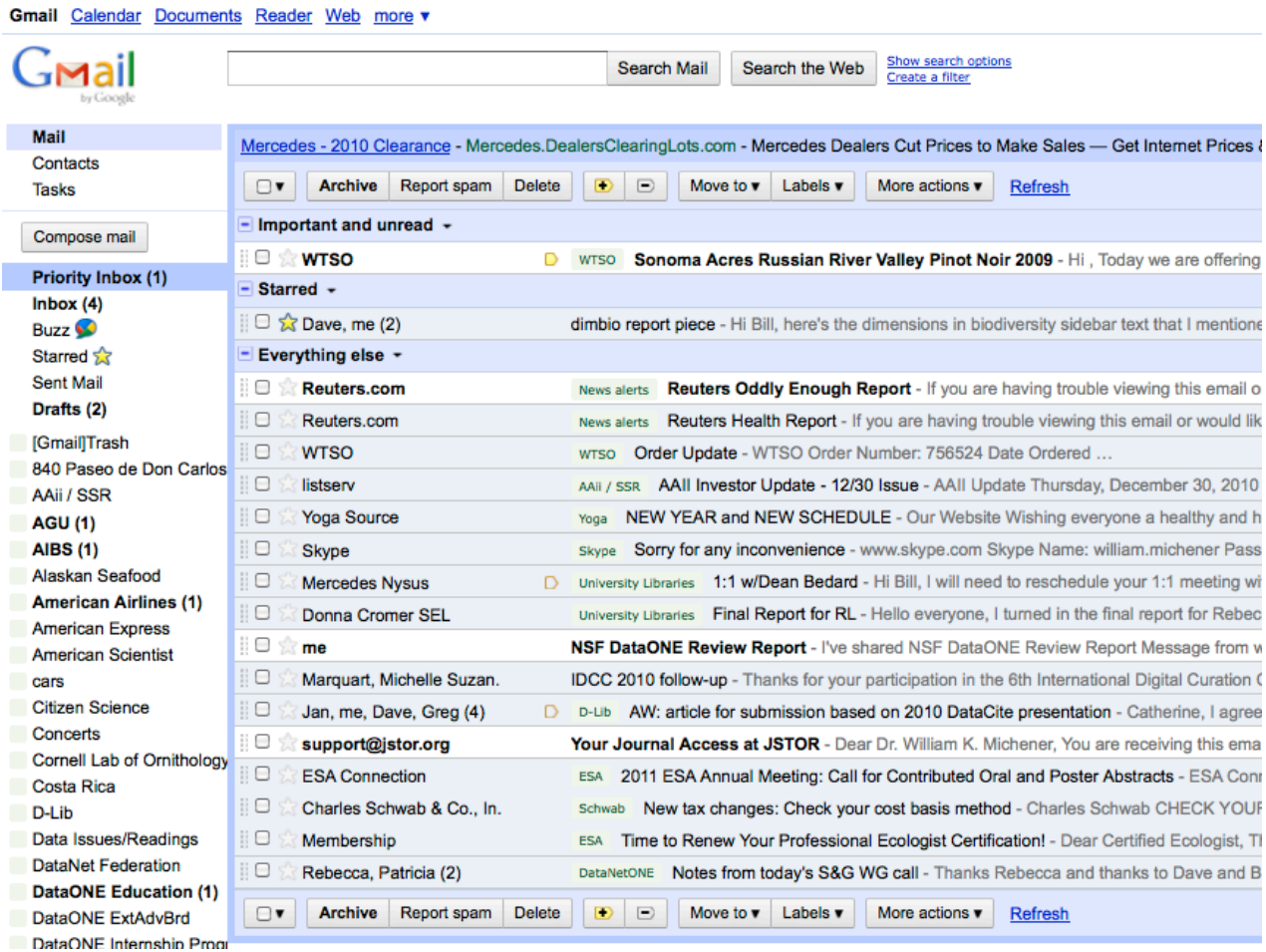
Filtering of email



File Management

- 1 folder per hanger
- Printed labels
- Purge dead folders 1X per year

Your “productivity” approaches ?

II. Proposal Development

- Requirements matrix (compliance matrix)
- Logic modeling (see Kellogg Foundation)
- Writing

Compliance Matrix

Requirement (from RFP)	Comments	Proposal Reference (page #, Section, or Attachment #)
is required, *should,* *must,* *it is expected,* *it is important,* *shall,* *may not*		
". In all instances, specification of performance milestones and a timetable for achieving such milestones ***is a requirement*** *for EPSCoR support."*	Created Gantt chart and included discussion of major milestones	Pages 14-15 in proposal plus Milestones in Appendix B (evaluation and assessment)
Also include Review Criteria		

Logic Model—Problem: Documenting & Understanding Changing Water Quality in NM Streams/Rivers Affected by Snowmelt Runoff

RESOURCES	ACTIVITIES	OUTPUTS	SHORT- AND LONG-TERM OUTCOMES	IMPACT
In order to accomplish our set of activities we will need the following:	***In order to address our problem or asset we will accomplish the following activities:***	***We expect that once accomplished these activities will produce the following evidence or service delivery:***	***We expect that if accomplished these activities will lead to the following changes in 1-3 and then 4-6 years:***	***We expect that if accomplished these activities will lead to the following changes in 7-10 years:***
• Funding for *in situ* water quality sensing system ($__,000) • Support for graduate and/or undergraduate student(s) to install and monitor systems, and to integrate and synthesize results • Established "Climate Change" web site for dissemination of results	• Specify system requirements • Purchase sensor system • Install, test and calibrate sensors • Develop and implement maintenance and operations plan • Develop database schema and QA/QC plan and make data available via web	• # locations instrumented • # megabytes available and online • # theses based on data • # publications based on data • # presentations at National meetings	• Increased use of water quality portion of web site • Increase in number of streams instrumented with water quality sensor systems • Increase in externally funded research projects focused on water quality questions	• Incorporation of water quality info into State water monitoring and mgmnt plans • Incorporation of water quality info into education exhibits and State curricula and teacher training • State-sustained water quality monitoring program

Logic Model—Problem: Creating a Citizenry that is Informed about Climate Change and its Impact on New Mexico's Natural Resources (#1—updating the NMNH&S Climate exhibit)

RESOURCES	ACTIVITIES	OUTPUTS	SHORT- AND LONG-TERM OUTCOMES	IMPACT
In order to accomplish our set of activities we will need the following:	***In order to address our problem or asset we will accomplish the following activities:***	***We expect that once accomplished these activities will produce the following evidence or service delivery:***	***We expect that if accomplished these activities will lead to the following changes in 1-3 and then 4-6 years:***	***We expect that if accomplished these activities will lead to the following changes in 7-10 years:***
• Funding ($ --,000) for *Sphere of Science* infrastructure • Support for 1 workshop that involves climatologists in developing exhibit content	• Specify system requirements •Purchase SoS • Install and customize # SoS content modules • Develop # new SoS content modules focused on NM climate change	• # user visits to SoS • # new content modules	• Increased visitation to climate change exhibit • Independent NSF (e.g., 1 or more ISE grants) and other funding for creation of new content modules and, possibly, the addition of one or more small SoS systems that can travel around State to other museums	• Increased recognition of importance of climate change and its impacts in NM • Increased use of SoS in informal science education throughout State

Writing tips

- Set aside time for thinking, outlining, and writing during most productive time of day (e.g., 1 hour every day)
- Make extensive use of outlines (from high to low level)
- Set manageable goals and sub-goals (e.g., 1 paragraph) and review daily
- Use google docs for collaborative writing (back up)
- Version documents with numbers/dates
- Do boilerplate work during non-productive hours
- Let others read, review and edit early on and frequently

III. Project Management

- Project Management Plans
  1. *Timeline and Key Milestones and Performance Metrics*
  2. *Work Breakdown Structure*
  3. *Resource Assignment Matrix*
  4. *Project Schedule*
     a. Gantt charts
- Communication

1. Milestones/Performance Metrics

Milestone	Responsible Person/Working Group	Period					
		Pre	*Yr 1*	*Yr 2*	*Yr 3*	*Yr 4*	*Yr 5*
Develop Project Management Plan	Michener, Koskela, Vieglais	X	R	R	R	R	R
Staff DataONE Headquarters	Michener, Koskela,	X	X				
Convene EAB Meetings	Michener, Koskela,		X	X	X	X	X
Convene Key Working Group Meetings	Leadership Team		X	X	X	X	
Plan/Convene User Group Meetings	Michener, Koskela,		X	X	X	X	X
Design, deploy collaboration and development environment	Vieglais, Wilson, Jones	X					
Design and deploy prototype DataONE infrastructure	Vieglais, Wilson, Jones		X				
Design and deploy version 1.0 infrastructure	Vieglais, Wilson, Jones			X			
Design and deploy version 2.0 infrastructure	Vieglais, Wilson, Jones					X	
Perform Baseline Assessment	Tenopir, Frame		X				
Develop Guidelines for Data Inclusion	Leadership Team		X	R		R	
Develop Policies for Data Use, Access and Citation	Cook, Frame, Cruse		X	R			
Acquire Data Holdings	Leadership Team			X	X	X	X
Implement Communications Plan	Michener, Allard, Koskela, Vieglais		X	R		R	
Ensure Financial Support and Sustainability	WG (Michener, Cruse)		X	X	X	X	X

Table 2 Key milestones for project lifetime. R = revision, X = completion

Confidential

2. Work Breakdown Structure

The Work Breakdown Structure (WBS) provides a hierarchical decomposition of the project activities, with the different levels representing different levels of detail. In general, the levels represent:

Level 1. Major component of project. (Administer, CI, etc.)

Level 2. Major phases by component. (Plan, Prototype, Staff. Etc.)

Level 3. Major project deliverables and related milestones. (Identify major work deliverables such as published plans, subsystems that must be designed, built, and tested during each phase)

Level 4. Activities. (Identify activities needed to create deliverables and achieve milestones; some interim, smaller deliverables such as documents may be involved)

Level 5. Tasks. (Break activities down to an appropriate level of task detail; i.e., small enough for tracking)

WBS Example

2. Design, Build, and Maintain Cyberinfrastructure
   - 2.1. Design and deploy distributed collaboration and development environment
     - 2.1.1. Collaboration web site deployed
     - 2.1.2. Mailing lists and communication mechanisms deployed
     - 2.1.3. Issue, change, and risk tracking deployed
   - 2.2. Design and deploy prototype infrastructure
     - 2.2.1. Design prototype system architecture
     - 2.2.2. Define participation guidelines for DataONE prototype
     - 2.2.3. Prototype the Coordinating Nodes
     - 2.2.4. Implement Member Node prototypes
     - 2.2.5. Prototype Investigator toolkit
     - 2.2.6. Prototype infrastructure passes acceptance testing
   - **2.3. Design and deploy version 1.0 infrastructure**
     - 2.3.1. Evaluate the prototype implementation of the core-cyberinfrastructure. This process also applies to major releases of the core software.
       - 2.3.1.1. Evaluate the prototype infrastructure for performance, scalability, stability, and maintainability.
         - 2.3.1.1.1. Setup testing framework for evaluation process
         - 2.3.1.1.2. Test component interactions
         - 2.3.1.1.3. Evaluate system scalability
         - 2.3.1.1.4. Evaluate system reliability and stability (data consistency, connectivity) under different loads and failure scenarios
       - 2.3.1.2. Evaluate the various interfaces including portal user interfaces and the various APIs
         - 2.3.1.2.1. Evaluate web user interfaces
         - 2.3.1.2.2. Evaluate application-programming interfaces for usability by third party developers with focus on external facing CN, MN and ITK APIs.
         - 2.3.1.2.3. Evaluate usability of the investigator toolkit components

Confidential

3. Resource Assignment Matrix

3.5 RACI – Resource Assignment Matrix

The following RACI, or responsibility matrix, delineates roles for the first year.

The key responsibilities are defined as follows:

- R –Those who do the work to achieve the task.
- A - Those who are ultimately accountable for the correct and thorough completion of the deliverable or task
- C - Those whose opinions are sought; and with whom there is two-way communication.
- I - Those who are kept up-to-date on progress, often only on completion of the task or deliverable; and with whom there is just one-way communication.

WBS		PI	EAB	LT	ED	D-D&O	D-O&E	CCIT & Developers	CEEWG	UAWG	SGWG
1	Project Administration										
1.1.	Project Planning										
1.1.1.	Produce Strategic Plan	A		R	I	I	I	I			
1.1.2.	Produce Implementation Plan (i.e., precursor to PMP)	A		R	I	I	I	I			
1.1.3.	Produce Project Management Plan (revised annually)	A	I	R	R	I	I	I	I	I	I
1.2.	Establish External Advisory Board (EAB)										
1.2.1.	Comprise EAB membership	I		A, R	I	I	I				R
1.2.2.	Complete EAB charter	I		A, R	I						R
1.2.3.	Convene EAB meetings	A, R		I	R						R
1.3.	Establish Working Groups (WG) (break into individual WGs)										
1.3.1.	Plan for WGs	I		R	I	A	A			R	
1.3.2.	Populate WGs			R	I	S	A			R	
1.3.3.	Convene key WG meetings			I	A	R	R			R	
1.4.	Establish DataONE Int'l Users Group										

4. Project Schedule

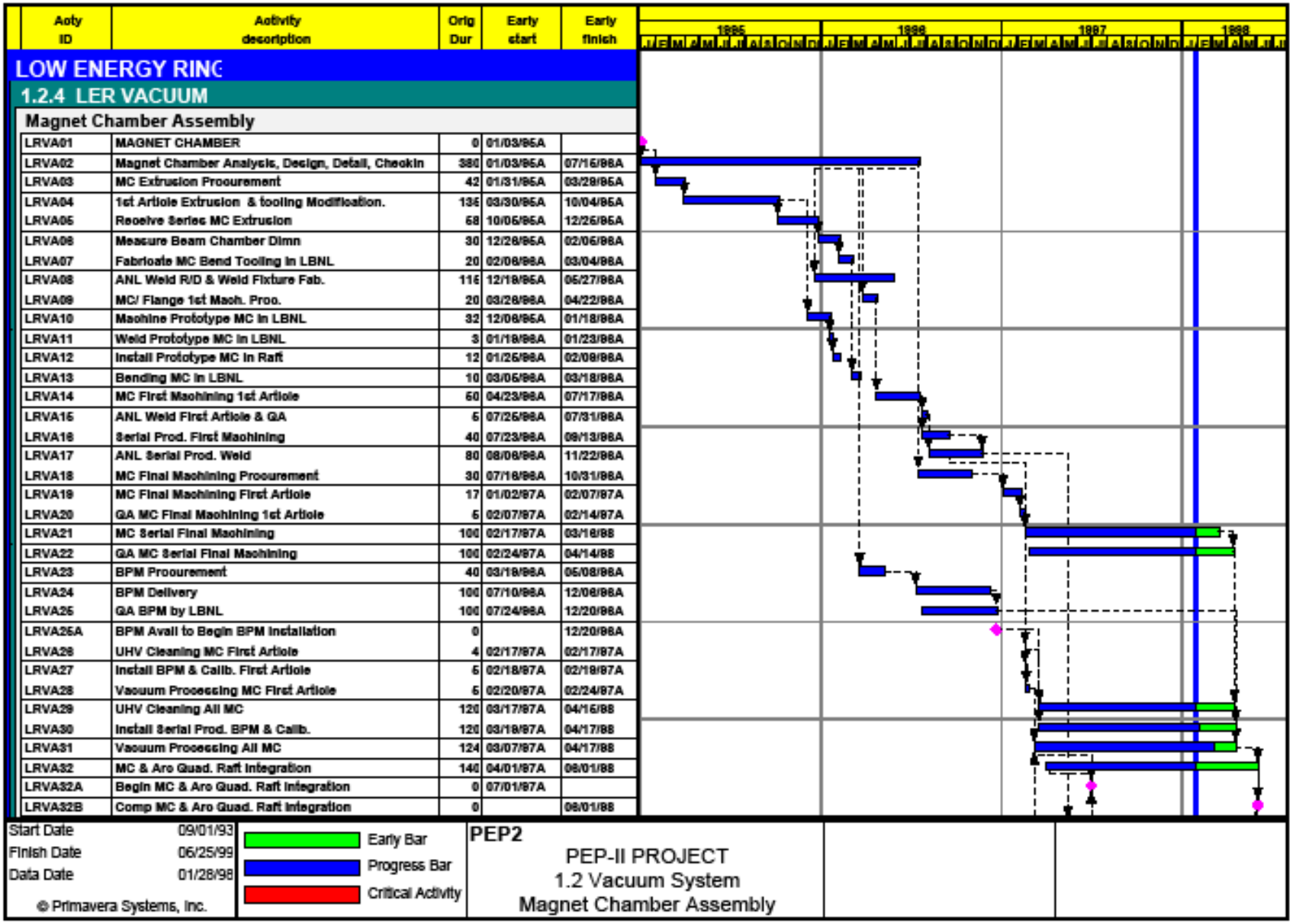
3.6 Project Schedule

3.6.1 Scheduled Year 1 Activities

Key activities that are currently scheduled for 2009-2010 include:

Meetings

- 17-19 November 2009 – EVA Working Group meeting in Albuquerque, NM (co-chaired by S. Kelling and R. Cook).
- 17-19 November 2009 – Meeting of VDC and Core CI Team plus key CI experts at the University of Tennessee-Knoxville (co-chaired by D. Vieglais, M. Jones, and B. Wilson).
- 11 December 2009 – Meetings with current (Goble, Buneman, De Roure) and prospective UK DataONE collaborators (William Michener).
- 2-4 February 2010 – Meeting of Community Engagement/Education/Outreach/Training (CE/EOT) cluster at University of Tennessee-Knoxville (co-chairs V. Hutchinson, S. Hampton, and S. Allard).
- 16-18 February 2010 – Meeting of VDC and Core CI Team plus key CI experts at the UC-Santa Barbara (co-chaired by D. Vieglais, M. Jones, and B. Wilson).
- 24 May 2010 – DataONE Leadership Team Meeting in Albuquerque, NM (co-chairs W. Michener, D. Vieglais, and R. Koskela).
- 25-27 May 2010 – DataONE Joint CI/CE Meeting in Albuquerque, NM (co-chairs W. Michener, D. Vieglais, and R. Koskela).


Aoty ID
Activity description
Orig Dur
Early start
Early finish
1995
1996
1997
1998
LOW ENERGY RING
1.2.4 LER VACUUM
Magnet Chamber Assembly
LRVA01 MAGNET CHAMBER 0 01/03/95A
LRVA02 Magnet Chamber Analysis, Design, Detail, Checkin 380 01/03/95A 07/16/98A
LRVA03 MC Extrusion Procurement 42 01/31/95A 03/28/95A
LRVA04 1st Article Extrusion & tooling Modification. 136 03/30/95A 10/04/95A
LRVA05 Receive Series MC Extrusion 68 10/05/95A 12/26/95A
LRVA06 Measure Beam Chamber Dimn 30 12/28/95A 02/06/96A
LRVA07 Fabricate MC Bend Tooling in LBNL 20 02/08/96A 03/04/96A
LRVA08 ANL Weld R/D & Weld Fixture Fab. 116 12/18/95A 05/27/96A
LRVA09 MC/ Flange 1st Mach. Proc. 20 03/28/96A 04/22/96A
LRVA10 Machine Prototype MC in LBNL 32 12/08/95A 01/18/96A
LRVA11 Weld Prototype MC in LBNL 3 01/18/96A 01/23/96A
LRVA12 Install Prototype MC in Raft 12 01/26/96A 02/09/96A
LRVA13 Bending MC in LBNL 10 03/05/96A 03/18/96A
LRVA14 MC First Machining 1st Article 60 04/23/96A 07/17/96A
LRVA15 ANL Weld First Article & QA 5 07/25/96A 07/31/96A
LRVA16 Serial Prod. First Machining 40 07/23/96A 09/13/96A
LRVA17 ANL Serial Prod. Weld 80 08/08/96A 11/22/96A
LRVA18 MC Final Machining Procurement 30 07/16/96A 10/31/96A
LRVA19 MC Final Machining First Article 17 01/02/97A 02/07/97A
LRVA20 QA MC Final Machining 1st Article 5 02/07/97A 02/14/97A
LRVA21 MC Serial Final Machining 100 02/17/97A 03/18/98
LRVA22 QA MC Serial Final Machining 100 02/24/97A 04/14/98
LRVA23 BPM Procurement 40 03/18/96A 05/08/96A
LRVA24 BPM Delivery 100 07/10/96A 12/06/96A
LRVA25 QA BPM by LBNL 100 07/24/96A 12/20/96A
LRVA25A BPM Avail to Begin BPM Installation 0 12/20/96A
LRVA26 UHV Cleaning MC First Article 4 02/17/97A 02/17/97A
LRVA27 Install BPM & Calib. First Article 5 02/18/97A 02/19/97A
LRVA28 Vacuum Processing MC First Article 5 02/20/97A 02/24/97A
LRVA29 UHV Cleaning All MC 120 03/17/97A 04/16/98
LRVA30 Install Serial Prod. BPM & Calib. 120 03/18/97A 04/17/98
LRVA31 Vacuum Processing All MC 124 03/07/97A 04/17/98
LRVA32 MC & Arc Quad. Raft Integration 140 04/01/97A 08/01/98
LRVA32A Begin MC & Arc Quad. Raft Integration 0 07/01/97A
LRVA32B Comp MC & Arc Quad. Raft Integration 0 08/01/98
Start Date 09/01/93
Finish Date 06/25/99
Data Date 01/28/98
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Early Bar
Progress Bar
Critical Activity
PEP2
PEP-II PROJECT
1.2 Vacuum System
Magnet Chamber Assembly

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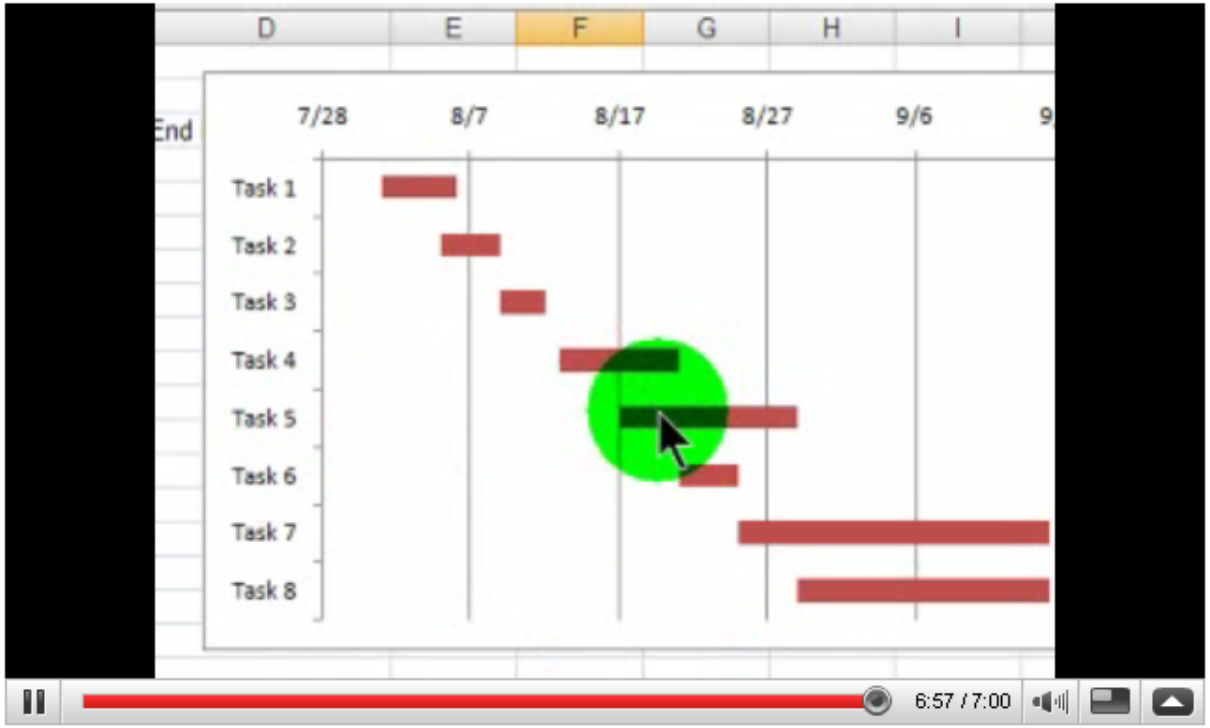

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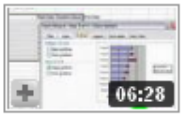

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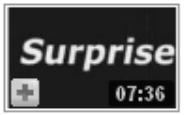

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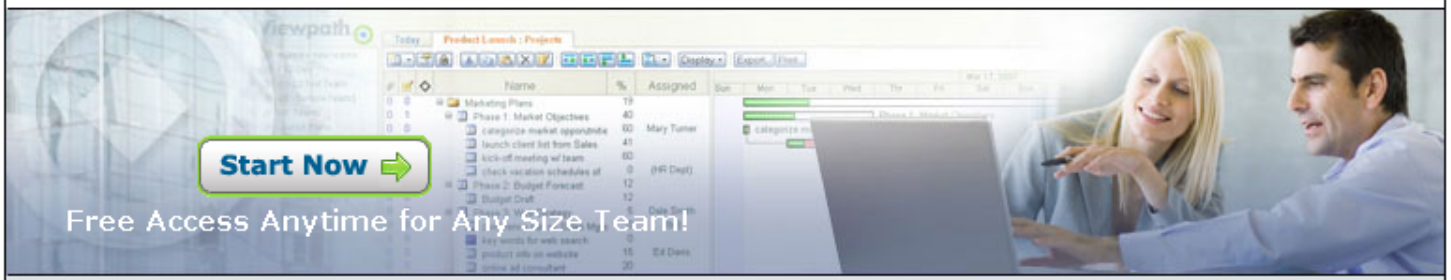

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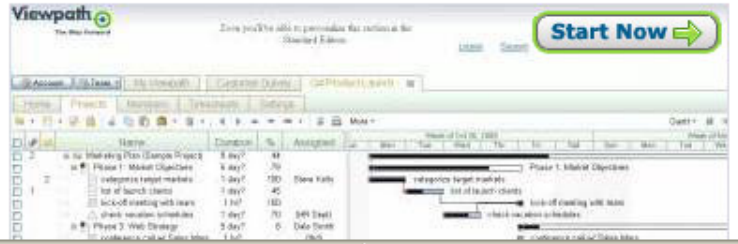

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Communication

- Frequent real or virtual meetings
  - time-limited
  - set agenda (e.g., 1 hour)
    - Major discussion topic (30 mins.)
    - Briefings (20 mins.; 5 mins. per topic)
    - Round-the-room if time allows
      - Round-the-room (10 mins.; 1-2 mins./person)
  - send agenda and reminder in advance
- Tools
  - Skype, ichat, webex, freeconferencing services, etc.

Your “tool” and “approach” ideas:

- Proposal Development?
- Project Management?