

Time Management, Proposal Development, and Project Management Tools

Bill Michener

New Mexico EPSCoR State Office

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

“stuff”

In-basket

What is it?

Is it actionable?

No

Trash

Someday/maybe
(tickler file; hold for review)

Reference
(retrievable when required)

Yes

What's the next action?

Will it take less than 2 minutes?

Yes

Do it

Delegate it

Waiting
(for someone else to do)

No

Defer it

Calendar
(to do at a specific time)

Next actions
(to do as soon as I can)

ACTION

Projects
(planning)

Project plans
(review for actions)

Multistep
projects

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

“stuff”

ACTION

ORGANIZE

In-basket

What is it?

Is it actionable?

No

Trash

Someday/maybe
(tickler file; hold for review)

Reference
(retrievable when required)

Yes

What's the next action?

Projects
(planning)

Multistep
projects

Project plans
(review for actions)

Will it take less than 2 minutes?

Yes

Do it

No

Delegate it

Waiting
(for someone else to do)

Defer it

Calendar
(to do at a specific time)

Next actions
(to do as soon as I can)

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”

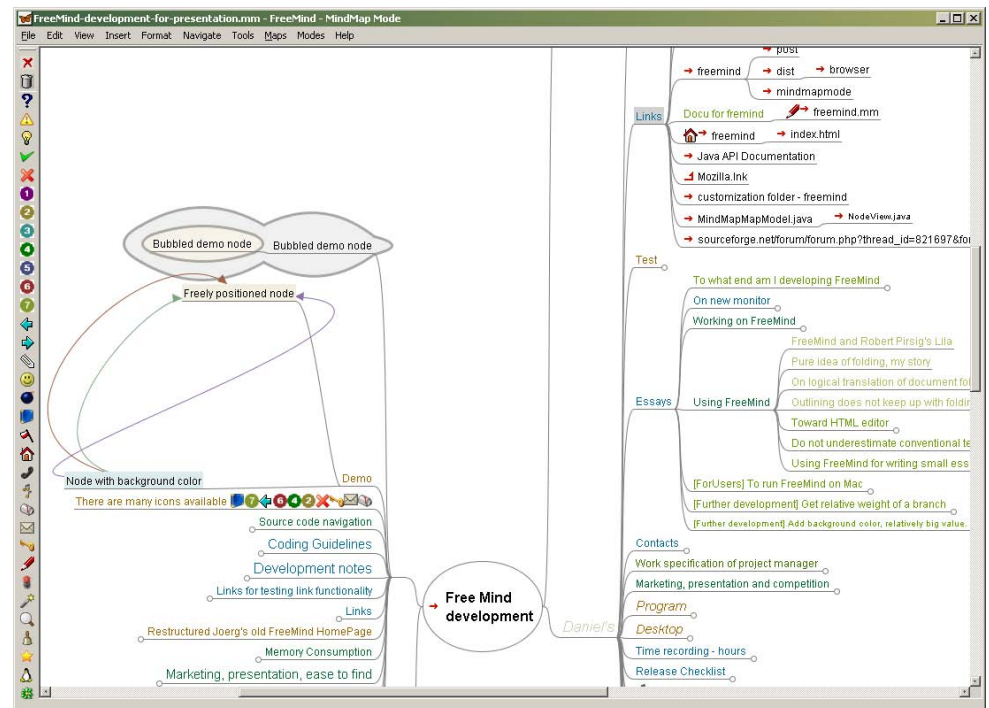
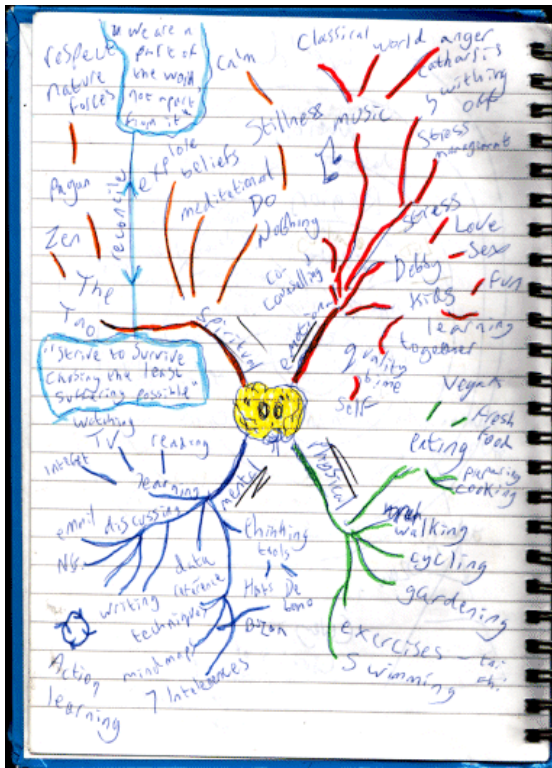
- Lesson 5 (**getting e-mail/in-box to empty**; page 152):
 - Re-use personal filing system approach (e.g., by projects)
 - Add:
 - @ACTION
 - @WAITING FOR
 - See lesson 2 (do it, delegate it, defer it, OR delete it)

“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





Search My Calendars Search Public Calendars Show Search Options

Create Event

Quick Add

January 2009

S	M	T	W	T	F	S
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

- ▼ My calendars
- William Michener
 - Kepler/CORE
 - NM EPSCoR NSF
- Settings Create

- ▼ Other calendars
- Add a friend's calendar
- Anna Morrato
 - Barbara Kimbell
 - Bob Waide
 - UNQ Staff Calendar
- Settings Add

Today January 2009 Refresh

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	Jan 1	2	3
9 yoga 9 yoga	John > Denver 8 MSP Conference C	Pluto > kennel +1 more	+3 more	+2 more	+2 more	2p Alyssa depart
9 yoga 9 yoga	2009 Jr Faculty Leadership Workshop Junior Faculty Train 8:50 UNM Hosp. Gen	3 Kings Day +2 more	4:30p yoga +1 more	LUQ Exec Board Junior Faculty Train +2 more	Junior Faculty Train +1 more	Luquillo trophic dyn 12:19p John depart
9 yoga 9 yoga	INTEROP DN1 mtg in SB CA NMHU Classes Start 8 MSP Conference C	Joint US-Mexico hurricane meeting 3p Kepler/CORE tele	UVI +5 more	+1 more		4:20p arrive 6:45p Bettys
9 yoga 9 yoga	8:15 Dr. Cheema at	UNM, NM Tech Clas NM Legislature open 9:30 derm 3p Kepler/CORE tele	PDPA Meeting PDPA Meeting 4:30p yoga +2 more	Jon 10 EB videocon 1:30p EPSCoR staff r	10 AD meeting	
9 yoga 9 yoga	Jon Bill's birthday 8 MSP Conference C	3p Kepler/CORE tele 6p obedience trainin	8 Thompson 8 Thompson 4:30p yoga 4:30p yoga	1:30p EPSCoR staff r	CMES strategic planing Jon's birthday	

The screenshot shows the Toodledo web application interface within a Mozilla Firefox browser window. The browser's address bar displays the URL "http://www.toodledo.com/views/index.php". The page title is "Toodledo :: Your To-Do List - Mozilla Firefox". The main navigation bar includes links for "View By: Main | Folder | Due-Date | Priority | Sharing | Search | Classic" and a button to "Add a Task". Below this, there are tabs for task management: "All Tasks", "Starred", "Hotlist", "Recently Added", "Recently Completed", and "Recently Modified". A yellow banner indicates "8 To-dos sorted by Folder". On the left sidebar, the user is logged in as "william.michener" with a "Pro Subscription". The sidebar also lists various features like "Sharing", "Calendar", "Scheduler", "Goals", "Files", "Notebook", "Statistics", "History", "Booklet", "Forums", "Folders & Contexts", "Import & Export", "Connections", "Account Settings", and "Sign Out". The main content area displays a list of tasks organized by folder. Each task entry includes a checkbox, star icon, hand icon, task name, folder name, due date, priority, and a document icon. The folders listed are DataNetONE, EPSCoR, LTER, Work-miscellaneous, and Finances. The Windows taskbar at the bottom shows the Start button, open applications (Microsoft PowerPoint, Toodledo), system tray icons (McAfee SiteAdvisor, weather), and the time (3:17 PM).

Toodledo :: Your To-Do List - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://www.toodledo.com/views/index.php

Most Visited Getting Started Latest Headlines Charles Schwab Delete Upcoming http://www.united.co...

Toodledo Welcome, **william.michener** Pro Subscription

To-Do List

- Sharing
- Calendar
- Scheduler
- Goals
- Files
- Notebook
- Statistics
- History
- Booklet
- Forums
- Folders & Contexts
- Import & Export
- Connections
- Account Settings
- Sign Out
- Upgrade Your Account Help & News
- Privacy | Conditions Copyright © 2008

View By: **Main** | Folder | Due-Date | Priority | Sharing | Search | Classic Add a Task

All Tasks | Starred | Hotlist | Recently Added | Recently Completed | Recently Modified

46 To-dos sorted by Priority Collaborators Filters Sort QuickSearch

Toggle Notes | Toggle Dividers | Toggle Subtasks Customize: Print:

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 [Close tip](#)

Task	Folder	Due Date	Priority
3 Top			
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> NBII SW Node plan	Work-miscellaneous	no date	3 Top
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> CI Stratgeic planning mtg prep	DataNetONE	no date	3 Top
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> RCN mtg plan	DataNetONE	no date	3 Top
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> esa talk	Work-miscellaneous	no date	3 Top
2 High			
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> take banner classes	EPSCoR	no date	2 High
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> clean desk and file cabinets	LTER	no date	2 High
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> PLoS data center paper	LTER	no date	2 High
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> VALIC -- review allocations in January	Finances	no date	2 High
1 Medium			
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Lter communication strategic plan	LTER	no date	1 Medium
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> cash in stocks lucent, lci, ncr	Mom	no date	1 Medium
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> collate EPSCoR bylaws and org charts from all states Anna and Lisa -- first pass at this	EPSCoR	no date	1 Medium

http://www.toodledo.com/vie... **M** Now: Mostly Cloudy, 32° F Mon: 44° F Tue: 45° F

start Microsoft PowerPoint ... Toodledo :: Your To-... 3:19 PM

Network Office Webmail - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://webmail.lternet.edu/squirrelmail/src/webmail.php

Most Visited Getting Started Latest Headlines Charles Schwab Delete Upcoming http://www.united.co...

Do you want Firefox to remember this password? Remember Never for This Site Not Now

Folders

Last Refresh:
Sun, 3:27 pm
(Check mail)

- INBOX (11)
- Drafts
- Sent
- Trash (Purge)
 - Letterhead
 - LTER Network Office
- @ACTION
- @PROJECT-ADEC
- @PROJECT-BioSci-SocRelResFSns
- @PROJECT-BioSci_IM fldStn
- @PROJECT-CREATE_CTR_EPSCORproposal
- @PROJECT-DataCtrPUB
- @PROJECT-DataNet
- @PROJECT-DataNet-CVs,C&P,COLBio
- @PROJECT-DataNet-ExtAdvComm
- @PROJECT-DataNet-Letters of Collab
- @PROJECT-DataNet-NSF correspondence
- @PROJECT-DataNet-ppt presentations
- @PROJECT-DataNet-Site Visit
- @PROJECT-DataNetONE-Budget
- @PROJECT-DataNetONE-str_plan
- @PROJECT-DataNetONE_full_proposal
- @PROJECT-DataNetONE_MgmtAdvTeam
- @PROJECT-DataNetONE_MgmtAdvTeam

Current Folder: INBOX [Sign Out](#)

[Compose](#) [Addresses](#) [Folders](#) [Options](#) [Search](#) [Help](#) [LTER Network Office](#)

Previous | [Next](#) | [1](#) [2](#) [3](#) [4](#) | [Show All](#) | [Toggle All](#) Viewing 11 of 11

Move Selected To: INBOX

From	Date	Subject
<input type="checkbox"/> Gayle Dana	3:25 pm	Re: education figure - trying again
<input type="checkbox"/> Gayle Dana	3:18 pm	Edits
<input type="checkbox"/> Barbara Kimbell	2:58 pm	logic model
<input type="checkbox"/> Barbara Kimbell	2:01 pm	Fwd: New email address.
<input type="checkbox"/> William Michener	1:50 pm	RE: education figure - trying again
<input type="checkbox"/> Marjorie McConnell	8:36 am	Lunch this week?
<input type="checkbox"/> kminnick@evalteam.com	12:10 am	RE: [Fwd: Acceptance into Faculty Leaders
<input type="checkbox"/> Katherine A. Mitchell	Sat, 10:14 pm	RE: education figure - trying again
<input type="checkbox"/> William Michener	Sat, 7:36 pm	Re: Track 2 drafts
<input type="checkbox"/> William Michener	Sat, 6:03 pm	Re: Track 2 drafts
<input type="checkbox"/> Katherine A. Mitchell	Sat, 9:15 am	RE: education figure - trying again
<input type="checkbox"/> Gayle Dana	Fri, 5:58 pm	Re: Track 2 drafts
<input type="checkbox"/> William Michener	Fri, 5:52 pm	Re: Track 2 drafts
<input type="checkbox"/> Gayle Dana	Fri, 3:20 pm	Re: Track 2 drafts
<input type="checkbox"/> Koerber, Sarah	Fri, 2:30 pm	Track 2 drafts
<input type="checkbox"/> mailman@lternet.edu	Thu, 6:00 am	LTER Network Office mailing list members

Done webmail.lternet.edu Now: Mostly Cloudy, 32° F Mon: 44° F Tue: 45° F

start Microsoft PowerPoint ... Network Office Web... Google 3:28 PM

File Management

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

II. Proposal Development

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

Compliance Matrix

Requirement	Comments	Proposal Reference (page #, Section, or Attachment #)
<i>is required, should, must, it is expected, it is important, shall, may not</i>		
	<i>“. In all instances, specification of performance milestones and a timetable for achieving such milestones is a requirement for EPSCoR support.”</i>	
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
<p><i>In order to accomplish our set of activities we will need the following:</i></p> <ul style="list-style-type: none"> • Funding for <i>in situ</i> 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 	<p><i>In order to address our problem or asset we will accomplish the following activities:</i></p> <ul style="list-style-type: none"> • 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 	<p><i>We expect that once accomplished these activities will produce the following evidence or service delivery:</i></p> <ul style="list-style-type: none"> • # locations instrumented • # megabytes available and online • # theses based on data • # publications based on data • # presentations at National meetings 	<p><i>We expect that if accomplished these activities will lead to the following changes in 1-3 and then 4-6 years:</i></p> <ul style="list-style-type: none"> • 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 	<p><i>We expect that if accomplished these activities will lead to the following changes in 7-10 years:</i></p> <ul style="list-style-type: none"> • 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
<p><i>In order to accomplish our set of activities we will need the following:</i></p> <ul style="list-style-type: none"> • Funding (\$ --,000) for <i>Sphere of Science</i> infrastructure • Support for 1 workshop that involves climatologists in developing exhibit content 	<p><i>In order to address our problem or asset we will accomplish the following activities:</i></p> <ul style="list-style-type: none"> • Specify system requirements • Purchase SoS • Install and customize # SoS content modules • Develop # new SoS content modules focused on NM climate change 	<p><i>We expect that once accomplished these activities will produce the following evidence or service delivery:</i></p> <ul style="list-style-type: none"> • # user visits to SoS • # new content modules 	<p><i>We expect that if accomplished these activities will lead to the following changes in 1-3 and then 4-6 years:</i></p> <ul style="list-style-type: none"> • 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 	<p><i>We expect that if accomplished these activities will lead to the following changes in 7-10 years:</i></p> <ul style="list-style-type: none"> • Increased recognition of importance of climate change and its impacts in NM • Increased use of SoS in informal science education throughout State

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*
- Gantt charts
- Communication

1. Milestones/Performance Metrics

Milestone / Performance Metric	Period					
	Pre	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Develop Project Management Plan	X	R	R	R	R	R
Staff DataONE Headquarters	X	X				
Convene EAC Meetings		X	X	X	X	X
Convene Key Working Group Meetings		X	X	X	X	
Plan/Convene International User Group Meetings		X	X	X	X	X
Design, deploy collaboration and development environment	X					
Design and deploy prototype DataONE infrastructure		X				
Design and deploy version 1.0 infrastructure			X			
Design and deploy version 2.0 infrastructure					X	
Perform Baseline Assessment		X				
Develop Guidelines for Data Inclusion		X	R		R	
Develop Policies for Data Use, Access and Citation		X	R			
Acquire Data Holdings			X	X	X	X
Implement Communications Plan		X	R		R	
Ensure Financial Support and Sustainability		X	X	X	X	X

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)

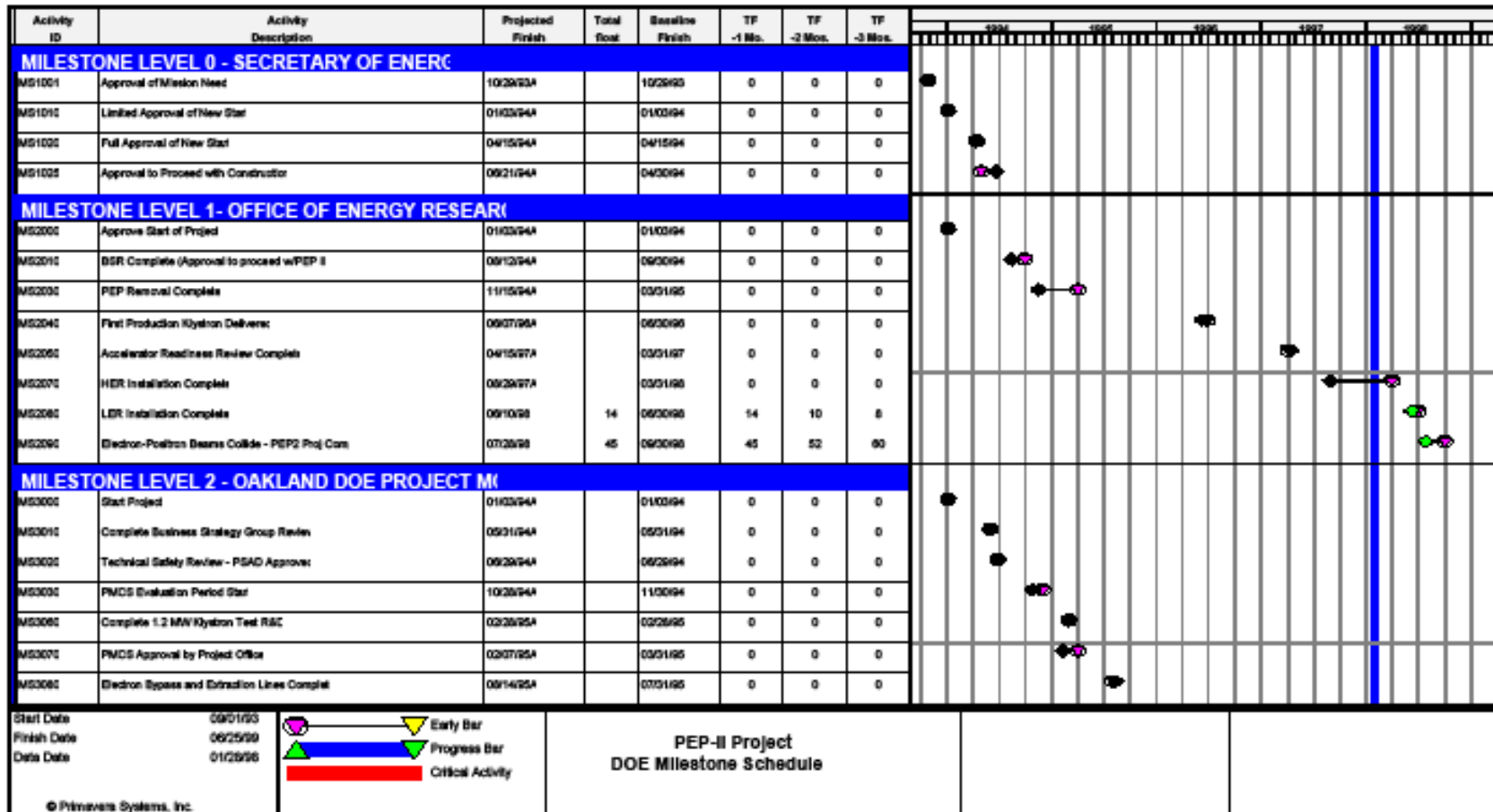
Level 5. Tasks. (Break activities down to an appropriate level of task detail; i.e., small enough for tracking)

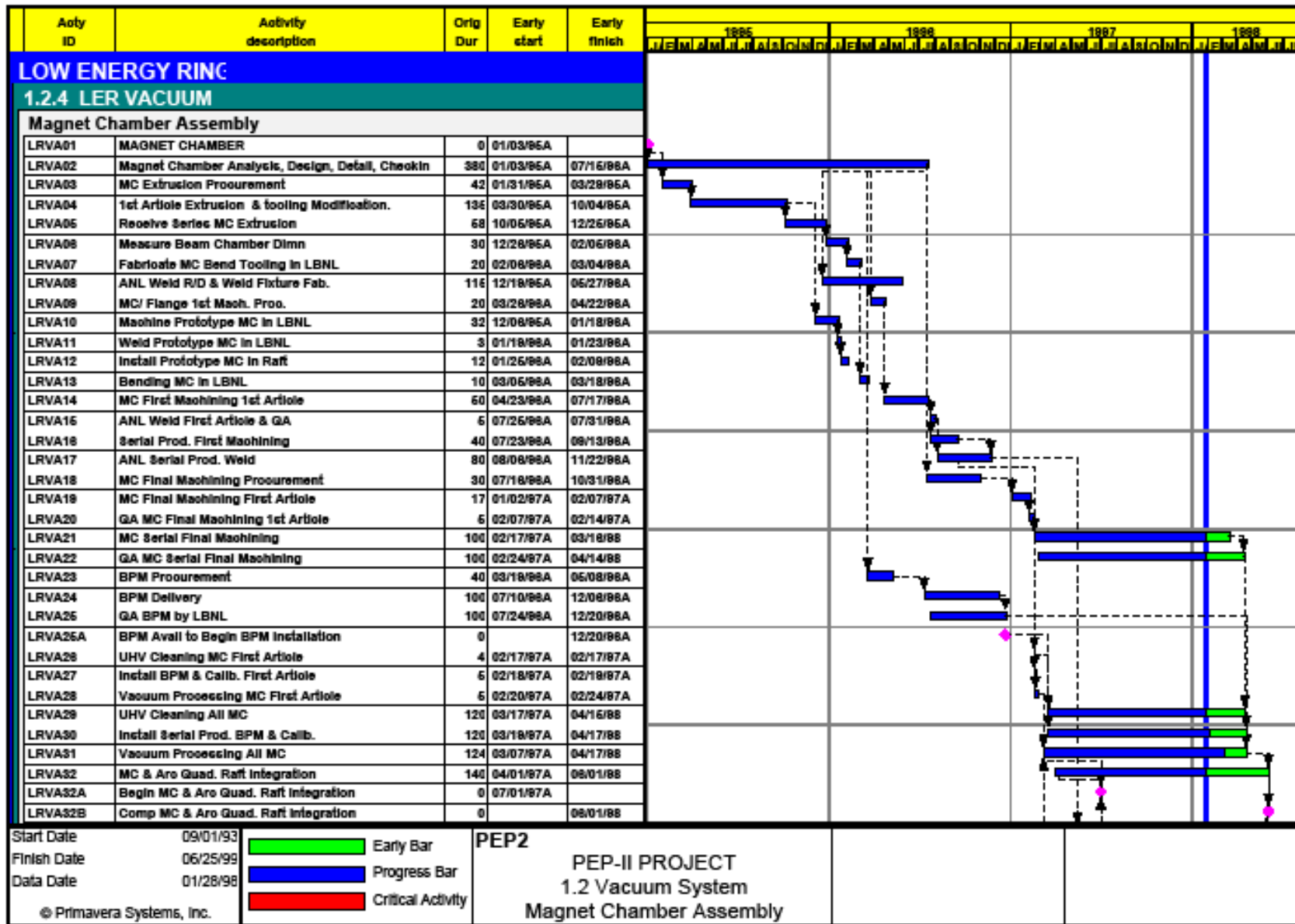
3. Resource Assignment Matrix

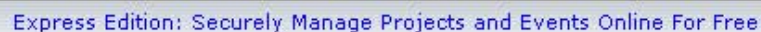
4. Project Schedule



Milestone Report





[illegible]

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)
- Tools
 - Skype, ichat, webex, freeconferencing services, etc.

Your “tool” ideas:

- Time Management?
- Proposal Development?
- Project Management?