Follow-Through Guidelines

Guidelines and Tools for Groups, Teams, and Projects

Produced by the Follow-Through Solution Group

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Introduction

This document was conceived in response to a widely held view that groups within the Melton Foundation are of greatly varying quality in terms of effectiveness, outcomes and deliverables, and member satisfaction. A survey conducted by the Follow Through Solution Group corroborated this opinion. It found that while some groups were tightly structured and performed well others manifested sporadic activity, and still others existed only in name. These guidelines, therefore, establish parameters and benchmarks that govern the operation of all MF groups to insure compliance with the MF Guiding Principles and the achievement of acceptable outcomes. These constraints will necessarily be broad and generic, and shall be complemented by a selection of tools and instruments that can be adapted to particular applications. These guidelines are not intended to replace any existing body of regulations, e.g. the guidelines of the Granting Committee, EVA plus, etc., but rather to strengthen internal group structure, improve group dynamics and facilitate compliance with such existing rules. These benchmarks assume critical importance in light of the new orientation imparted to Work Group work and the new Granting Policy, which now require more substantial deliverables.

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FAQs

What are the Follow Through Guidelines?

These are a set of guidelines which aim to provide structure and workflow for Melton Foundation projects, teams and groups so that they meet their stated goals and objectives.

Why were the guidelines created in the first place?

A widely held view within the Melton Foundation is that MF group work is of greatly varying quality in terms of effectiveness, outcomes and deliverables, and member satisfaction. A survey conducted by the Follow Through Solution Group corroborated this opinion. These guidelines, therefore, were created to address this problem so that MF group work can achieve acceptable quality standards leading to outcomes that fulfill the MF's Guiding Principle.

Are these Guidelines intended to replace existing group or project rules?

These Guidelines are not intended to substitute for existing MF policies, such as the Granting or Workgroup policies. In the event of any contradiction or confusion, please contact the Follow-Through Solution Group at mf_followthrough@meltonfoundation.org for guidance.

Will these guidelines ensure that my MF dream project sees the light of day?

No! These are guidelines, which should make the process of undertaking and pursuing an initiative more structured. The success of any project also depends on the actual effort members put into the work.

Do all groups have to follow 100% of the Guidelines?

They are generic and broad in order to encompass the various types of groups in the MF, yet can be specialized and localized for specific initiatives.

What are the templates?

The templates are tools for implementing the guidelines. These templates help you carry out standard procedures in a preset format, used as a starting point for a particular undertaking so that the format does not have to be recreated each time it is used. This also maintains uniformity among groups.

What is the difference between the guidelines and the templates?

Guidelines denote a specific process, and help give direction to ideas. Templates are practical tools that can be used to implement the guidelines.

Should I use all of the templates for my project? They seem too complicated and elaborate!

You need to pick and choose carefully the guidelines and templates that suit your project.

Who can use these guidelines?

These guidelines are applicable to all MF groups and projects.

How will the guidelines affect my project's working?

The guidelines will give group members a framework for agreeing upon a course of action and for identifying their roles, responsibilities for activities --and to each other--, and the other resources they need to successfully carry out their group's activities.

I have specific doubts regarding the guidelines and /or templates. Whom do I contact?

Please email any of the Follow Through Solution Group members individually, or contact us at mf_followthrough@meltonfoundation.org

Summary of Guidelines

This section is intended to provide a short summary of individual guidelines for follow-through of projects. A detailed exegesis of each of these guidelines is found in subsequent sections of this document:

a. **Project Definition**
Group members must agree upon and clearly define their project. The tool for accomplishing this is a Mission Statement**.**

b. **Ownership: Roles, and Responsibilities**
Groups will only succeed if specific people take ownership for specific roles and responsibilities and if the group has the appropriate diversity of skills and cultures to accomplish its mission. Tools for defining these roles and responsibilities include developing a Responsibilities Matrix and Task Tracking by specific individuals in the group.

c. **Internal Governance**
Developing clear and democratic procedures that ensure consensus on decision as well as accountability for individual's actions is critical. In addition to voting procedures, tools to **empower** active members and deal with non-performing members help ensure strong internal governance of the group.

d. **Group Communications**
Understanding the types of internal communication appropriate for each group and setting up the appropriate email channels, frequency of realtime meetings, and other formats and technologies is critical. Groups also need to establish how and when they will communicate their work to the wider MF or other communities. All of this will entail developing a Communications Plan.

e. **Time, Resources and Scope**
Managing the time and resources available for the project are key to ensuring its successful implementation. Developing a Gantt Chart or Implementation Calendar and, where financial resources are involved, a clear budget will help ensure groups stay within the scope of their project and their available resources.

f. **Reporting to Sponsors**
Agreeing to periodic team reviews enables groups to compare their planning with their execution in order to make necessary adjustments and ensure continuous improvement. Also, for funded projects, submitting reports is a necessity to show what has been accomplished.

g. **Lessons Learned and Best Practices**
Systematically evaluating the group's project is both a learning opportunity for the group's members as well as a teaching opportunity for the wider MF community. This should be accomplished through evaluation meetings, surveys, or other means.

Follow-through Guidelines

a. Project Definition

The group must agree and be able to communicate to others exactly why they exist, what they do, and how they will do it.

To accomplish this, each group should develop a Mission Statement which clearly and concisely explains the group's purpose, the rationale for its creation and, precisely defined, the scope of its purview. The Mission Statement makes explicit the projected outcomes of the group's program, the nature of its composition and the expected length of the life of the group (single-project-driven or open-ended association?). The Mission Statement should also articulate the correlation with the Guiding Principles of the Melton Foundation.

See the Mission Statement Template in the tools section.

b. Ownership: Roles and Responsibility

*Groups will only succeed if specific people take **ownership** for specific **roles** and **responsibilities**. In defining roles and responsibilities, you must avoid confusion ("who's supposed to that?") and each member must be publicly accountable to the group for his or her work. Your group also needs to make sure it has the right diversity of skills, cultures, geographic and institutional representation to carry out its goals.*

Group Formation: Do we have the right ingredients?

Your group should meet to assess group membership and create an inventory of the members based on the following three attributes:

1. **Skills & Knowledge**: What do we know how to do? Typical skills needed are:
    a. Writing and editing
    b. Budgeting
    c. Public speaking and/or teaching
    d. Specific languages
    e. Technology skills
    f. Content area knowledge related to group's subject (e.g. health, business, etc.)

2. **Cultural Diversity:** For most MF activities this is a necessary ingredient to ensure inter-cultural learning and bringing multiple perspectives to the group's activities.

3. **Geographic Distribution:** Does your group have people in the places where you will be carrying out activities?

Once you have created your group inventory, determine: Does it match what we need? In any areas where you answer "no" you should recruit appropriate members to meet your needs or redefine your project accordingly. For example, if your project entails "building a website" but nobody in your group has web design skills, you must find somebody, train yourselves, or decide to not commit to designing a website.

Roles

"Let's all build a website!" is a nice *idea*, but it's not a *plan*. Instead, your group must decide on management roles for its members and specific tasks to each of them to carry out.

Typical roles include:

1. Project Leader (or chair or champion): Somebody must be the "go to" person for problems and to mediate decisions. This role must be clear to all, agreed by all, and unambiguous.
2. Meeting Manager: who will set up and/or manage the group's real-time meetings or discussions online? This can often be the project leader's role too.
3. Note Taker: a group member must take notes and distribute them among the group
4. Official communications and liaison with directors and outside communications
5. Budget Manager (if applicable)

Task Responsibilities

Defining clearly and publicly who is responsible for specific tasks is also critical to the group's success. Every meeting or discussion that creates action items must have names and due dates attached to each action. Each person who commits to something is accountable to his or her team for that item by the date promised.

Each group should develop a “Roles and Responsibilities Matrix” (see template in tools section) to ensure that its members have defined their roles and responsibilities clearly. Later, during implementation, groups can use the “Task Tracker Tool” to break down and monitor ongoing tasks by person and due date.

c. Internal Governance

Group members need to agree upon how they will govern themselves. This entails decision-making procedures such as voting as well as how to ensure the accountability of its members.

Voting

A group may need to hold a vote for any of the following kinds of situations in a project group:
- Election of the project champion
- Major decisions in which systematic opinion of a majority of group members is required.

As far as possible, explicitly designate a group member as "election manager” who takes ownership of the voting process. This ensures the process moves systematically and somebody is responsible to keep the wheel moving and ensure the right things are done, from defining the election to the actual conduct of the vote, to enumeration and announcement of results.

If team members are not physically together (such as in a symposium or other meeting), it is highly recommended to use online tools like *Survey Monkey* to conduct the vote. Use of simple e-mail might prove very cumbersome.

For a voting process to be valid, and the result be construed as the legitimate opinion of the group:
1. More than 50% of the group members must have participated in the vote.
2. The winning decision usually should have a simple majority (the positive vote of more than 50% of the voters).
3. For more complex situations, the group might want to create more detailed voting criteria (addressing things like what to do in case there is a tie, frequency of voting, what happens if minimum quorum is absent etc).

Tools for motivating members

Those who actively contribute need to be recognized and those who fail to keep commitments to their group need to be accountable. All groups should agree upon and implement mechanisms to ensure both, including:

1. **Public acknowledgement and congratulation of specific accomplishments:** This is one of the most important ingredients for longevity and success of project groups. There should be continual progress and constant acknowledgement of achievements and constructive criticism, which will ensure constant progress.

2. **Ownership and empowerment**: The key function of the "Responsibilities Matrix" that each group should develop is to make clear who "owns" which area of responsibility. This ownership helps ensure people are accountable to the group for their work and are empowered to take it forward.

3. **Dealing with non-performing group members**: It is essential to the group's performance that the group agrees upon a way to deal with any members who repeatedly fail to keep commitments, including attending meetings or submitting deliverables. Failing to address non-performing members is demoralizing to the remaining members and is also inefficient. Typically actions to address this problem include:

   Step 1: Private emails or phone calls by the group leader to the individual to ascertain whether he or she is experiencing problems that interfere with his or her performance; depending on the situation, work can be reassigned or other steps to support the individual can be taken.

   Step 2: If repeated follow-up is ignored, work can be reassigned; if the behavior continues, subsequent steps can be taken, including:
   a) Formal removal from the group by vote or delegation to the group leader;
   b) “Soft-removal" from the group, meaning the person may be in the group in name, but is no longer invited to meetings, assigned tasks, or given any form of public recognition in public communications.

All groups should develop a policy for dealing with non-performers (see Annex and Tool section for a sample policy which should be adapted to the specific circumstances and philosophy of your group).

d. Group Communications

*A clear communications structure ensures group collaboration and is closely linked to the roles and responsibilities inside a group. In defining the group's internal Communication Structure, the group is establishing **which communication channels** to use and the **frequency** with which they are used.*

Choosing the Right Communication Modes

Different modes of communication serve different purposes and have their own strengths and weakness. In selecting appropriate technologies or channels, the types of tasks that teams work on can be divided into four broad categories:

1. Generating ideas and plans about the team's work, including collecting data to make decisions about plans.
2. Solving routine problems where answers already exist.
3. Solving ambiguous or complex problems where routine answers may not exist.
4. Negotiating interpersonal or complicated technical conflicts between individual team members or organizations.

	TYPES OF TASKS			
COMMUNICATION MODES	GENERATING IDEAS AND COLLECTING DATA	ROUTINE PROBLEMS	AMBIGUOUS OR COMPLEX PROBLEMS	NEGOTIATING TECHNICAL OR INTERPERSONAL PROBLEMS
AUDIO / VIDEO	Marginal or Good fit	Good fit	Good fit	Good fit
DATA ONLY (EMAIL, WEBSITES, ETC)	Good fit	Marginal fit	Poor fit	Poor fit

As you can appreciate from the above matrix, as a rule realtime (audio/video) communications are effective for nuanced problem-solving and negotiating interpersonal team issues. Groups that rely only on data (email, websites, etc.) typically fail because of their inability to retain cohesiveness, excitement, or to navigate ambiguities. On the other hand, online data exchanges are powerful gatherers of information. In sum, for almost all groups, ***both forms of communication are indispensible***.

Now let's apply these concepts to the Melton Foundation's groups. Depending on your group, we recommend varying usages of technologies:

TECHNOLOGY / GROUP MATRIX **What Communication Modes are Best for Your MF Groups?**							
MF GROUPS		**COMMUNICATION MODEs**					
		Real-time Communication				*Data Only*	
Name	Purpose	Face to Face	Chat	Conference Calls (Copper)	Webex (Audio/ Video/Data)	Drupal page (file upload)	Webpage (wider community)
Workgroups	Educational and Project Development	--	✓✓	✓✓✓	✓✓✓	✓✓	(✓)
Trainee Team up	Educational	--	✓✓✓	(✓)	(✓)	✓✓	(✓)
Project groups	Educational and Project Development	(✓)	✓✓	✓✓	✓✓	✓✓	✓✓✓
Group grants	Educational and Project Development	✓✓	✓✓	✓✓✓	✓✓	✓✓	✓
Solution groups	Project Development	(✓)	(✓)	✓✓✓	✓✓	✓✓	(✓)
Campuses	Multiple	✓✓✓	(✓)	--	--	✓✓	✓✓✓
Regions	Multiple	✓✓✓	(✓)	✓✓	✓✓	✓✓	✓✓
Other ad-hoc projects	Project Development	Depends on project	✓✓	✓✓	Depends on project	✓✓	(✓)
Criteria: ✓✓ ✓ Required; ✓✓ Useful (✓) Optional; -- Not applicable							

Often groups start with an audio kick off following more data driven communication to move to audio and data usage towards finalizing important steps and projects. Some communication modes such as the Copper teleconference system or Webex require a host and advanced scheduling to ensure a maximum turn out. Be sure to define those roles and also possibilities to contact each other on alternative communication channels in case of technical difficulties.

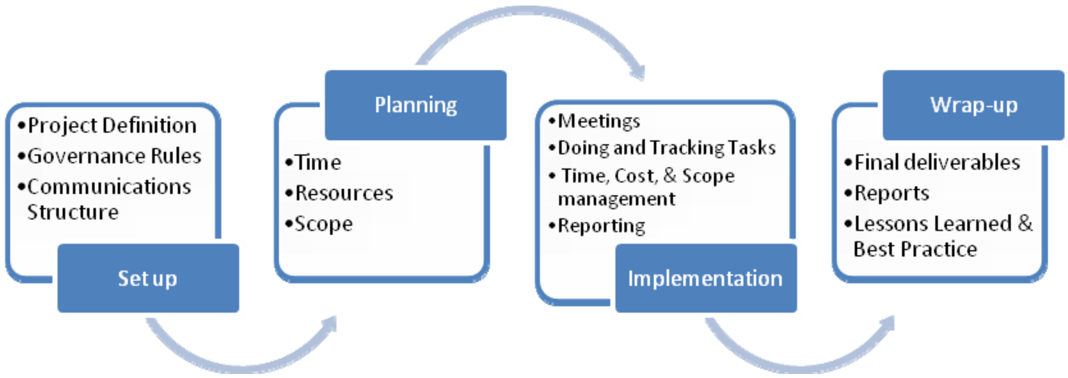
e. Time, Resources and Scope

Time, resources, and scope form the foundation of the project. Managing them efficiently will entail thorough planning to ensure proper implementation of the project's activities. The group must come up with a timeline (see Gantt Chart and Implementation Calendar templates in the tools section) for the project work along with the resources that they will employ. The first step towards making good time estimates is to fully understand and define the project at hand and translate it into times required to carry out each activity. Finally, scope management is necessary to ascertain that the work carried out does not protract from the initial project definition.

Project Stages

The project life cycle consists of a few stages common for all groups. The first stage is the set-up phase, including work to develop a clear understanding of the group's mission, agreeing upon ground rules to govern the group, and setting up the communication structure (groups, types, meeting frequency, etc.). This will be followed by the brainstorm and discussion phase. Then comes the implementation stage which includes performing the actual tasks accompanied by reporting, carrying out periodic checks, checking action items and conducting meetings. Closure is the final stage, which entails documentations, submitting the final deliverables, carrying out final checks and appropriate reporting.

The Project Lifecycle:



Time Management

Your "Roles and Responsibilities Matrix" (see template in Tools section) specifies which member(s) will be responsible for each task area. Now that your group has defined its activities and the people responsible for them, you must define this information in greater detail and map it out over time and ensure appropriate distribution of work among the resources:

1. First, make a Gantt chart or an Implementation Calendar (see templates in Tools section) to plan the time frame required for execution and completion each of activity.

2. Second, break down these activity areas into specific tasks. Groups can use the "Task Tracker Tool" to monitor their ongoing tasks by person and due date.

Cost Management

The financial aspect of the project may/may not be charted right at the inception of the project. Any grant-supported projects will require a detailed budget prior to receiving support. Even if it is not grant-funded, to the extent your project may incur costs, a budget will be necessary and must be tied to the activities laid out in your planning. These expenses can include travel, telecommunications, printed material, postage, meals, or special services. (See the budget template in the Tools section.)

Scope Management

Scope of the project defines the purview of the project as well as the scale of the outcome that the project aims to achieve. The relevance of the project to the MF is another important aspect to be considered under the purview of the resources invested. It is imperative to define what falls under the span of the project clearly to prevent deviation from the project's principal aims.

One of the most deadly afflictions of projects is “scope creep” meaning that the project’s activities wander off into areas outside of its purview, leading to a diffusion of members’ energies, loss of focus, and ultimately to the disintegration of the project.

Periodic Team Reviews

It is very unusual for any undertaking to go exactly to plan. Projects are no exception. It is important to monitor the degree to which the plan is being followed, and to take appropriate action if the project is deviating significantly from the plan.

To offset this, all groups must hold periodic internal team reviews that serve as checkpoints at regular intervals to provide for monitoring work on the project. This enables the team/group to concentrate on determining what to do next. Standard agenda items for these discussions are:

1. Review of activity and deliverable deadlines: Are we on schedule?
2. Planned activities that are incomplete or overdue: What are the causes and how do we address them?
3. Achievements this period
4. Activities for the next period
5. New issues identified this period
6. Issues closed this period
7. Suggested revisions to the plan

Tools to support these meetings include your Gantt chart or Implementation Calendar, budget (if financial resources are involved) and Task Tracker. It may also be necessary to revise your Roles and Responsibilities Matrix in the event that individuals need to adjust their original commitments to the team or if certain tasks have changed.

f. Reporting to Sponsors

Most groups – and all groups receiving direct sponsorship-- must submit report(s) of their development and achievements to the correspondent MF (higher) body, generally the executive team, the campus Procom, or a specific Grant Committee. These reports are not only necessary to justify any use of financial or other resources, but serve as record of current achievements and immediate expectations of the project.

Frequency of reporting to sponsors should be agreed upon in advance and usually is either annual or bi-annual or at the conclusion of a project. These reports should provide an accurate history of the project, effectively communicate its current status and integrate progress tracking and issue management. Reporting should always describe the impact of the project including benefits to others and to the members themselves of the work done. Most reporting will follow criteria requested by the sponsor (either within the MF, such as the Grant Committee or executive office, or external sponsors), but generic elements your group should cover include:

- Impact of the activities

- Accomplishments this period
- Items not completed this period
- Proposed activities for the next period
- Retain an electronic and paper copy of the status report

g. Lessons Learned and Best Practices

Learning from experience and sharing those lessons learned with others are among the most important aspects of MF group work. It is also essential to document the accomplishments of group activities in the form of best practices so that others can emulate your success. Dissemination of this information is critical for the experience to have impact beyond the confines of the group.

Lessons Learned

Capturing lessons learned is the process of gathering, documenting and analyzing feedback on how projects undertaken were implemented, for the benefit of the group's members and other project teams in the future. This is essentially an assessment process and can be divided into three components:

1. Prepare project assessment: Determine which information-gathering formats you will use; they can include:

a) Meetings –both internal self-assessment and/or with beneficiaries;
b) Surveys or questionnaires to beneficiaries of the activity
c) Compiling earlier documentation, such as reports, older surveys, etc.

Make sure that the assessment includes an evaluation against the expected standards that were defined during the project initiation stage. Prepare and distribute material as appropriate.

2. Conduct project assessment: Using the chosen formats, determine:

a) If the project has been successful in relation to the original expected standards.
   - Impact on beneficiaries (those who participated in workshop, saw the movies, etc.)
   - Fulfillment of MF Guiding Principles
b) If the project meets all deliverables; if the project does not meet them, identify the shortcomings and record them.
c) If any of the shortcomings with the final project outcome need to be addressed. If there are any items that need action, decide on the best way of addressing the items. Options include:
   - do not close the project
   - define a follow-on project
   - initiate a maintenance / sustenance process

3. Initiate maintenance / sustenance process: If there is a need for on-going maintenance / sustenance of the project, a maintenance/sustenance process should be identified and implemented.

Best Practices

MF groups whose projects and activities accomplish something new and beneficial need to share that information with the wider community. This is not only great “PR” and recognition for the group but it also establishes new standards for others to emulate. This entails communicating your project, its impact, and how you accomplished it using multiple channels, including:

1. The group’s website
2. Email announcements via melall or other channels
3. Giving presentations via Webex or at meetings, such as the Symposium
4. Publishing articles in MF or other publications

Best Practices are useful also to open partnership possibilities and to provide interest material to others.

Tools and Other Resources

The tools and templates on the following pages can be downloaded, used, or customized by groups.

List of tools and templates

1. Mission Statement Template
2. Responsibilities Matrix
3. Sample Policy for Dealing with Inactive Members
4. Gantt Chart Software
5. Implementation Calendar Template
6. Task Tracker Excel Template
7. Internal Communications Plan Template
8. Budget Template

Download these documents from http://drupal.meltonfoundation.org/follow-through

See copies of templates on following pages……

1. Mission Statement Template

This template can help your group come up with a Mission Statement. Just follow the steps below.

Group consensus regarding its purpose and values –"*why we exist"*—is important. To ensure this happens, groups should undergo a process to brainstorm, agree upon, concisely write down, and disseminate their *Mission Statement*.

The following elements can be included in a Mission Statement. Their sequence can be different, but it's important that the elements supporting the accomplishment of the mission be present and not just the mission as a "wish". These elements include:

- **Purpose** and **values** – and how do these relate to the MF Guiding Principle?
- **Who benefits** from the group's activities?
- **What responsibility** does the group have towards its beneficiaries?

How to Produce Your MF Group or Project's Mission Statement

1. **Meet** (Webex; face-to-face) to **brainstorm** – meaning you write down everybody's ideas without indicating agreement or disagreement – regarding:

    a. Why do we exist?
    b. What motivates us to do this project or activity?
    c. How does our project or activity fulfill MF Guideline Principle? Which aspects?
    d. Who benefits from our group's work?
    e. What are the overall responsibilities of our group, i.e., we commit ourselves to.... what?
    f. What are our goals and objectives?

2. **Discuss** your list of ideas and try to get to consensus regarding the essence of each of the above features. Don't sweep differences under the rug! Doing so will only lead to problems later!

3. **Draft** your Mission Statement into a concise (from one sentence to no more than one short paragraph). Is it clear? Do you all like it? If so, use it in your public statements and to guide your work.

Mission Template

"The [groupname/projectname] exists in order to [purpose….under XX aspects of the MF Guiding Principle….and for XX beneficiaries]. We achieve [goals; objectives] through [group's activities]."

Download a Word version of this template from:

http://drupal.meltonfoundation.org/follow-through

2. Responsibilities Matrix Template

MF Groups can customize this matrix to their project and membership.

Member Name	Title[1]	Responsibilities
	Group Leader (or Coordinator; Leader; Champion)	• Management oversight • Coordination to ensure ensuring group's commitments and deliverables are met
	Campus Liaison 1, 2,3..etc.[2]	• Local oversight & management • Reporting to group
	Budget manager	• Helps develop any budgets • Tracks expenses • Develop reports to sponsors/funders
	Communications manager	• Sets up realtime meetings (webex, etc.) • Helps produce presentations and reports
	Note taker	• Takes and share meeting minutes
	Web Master	• Maintains group's website/Drupal site
	What other roles….specific to group or project?	

Download a Word version of this template from:

http://drupal.meltonfoundation.org/follow-through

[1] These are sample titles – each group needs to adapt titles and responsibilities according to the beneficiaries and scope of the project and activities.
[2] Projects involving campuses should have somebody directly and publically responsible on behalf of the group for the group's work at *each* of these campuses.

3. Sample Policy for Dealing with Inactive Members

Groups can adapt this sample template to their specific needs and philosophy.

Group Agreement for Dealing with Inactive Members

To succeed, our group needs all its members to stick to their commitments. Some people have the time and availability to do more while other members have less time or are able to contribute. However, all members must only make promises they can keep and all members must meet the group's minimum standards. These include attending agreed-upon meetings and delivering accepted tasks on time and according to the agreed-upon standards. Individuals who do not do these things harm the group's performance and demoralize their colleagues.

Therefore, we have agreed upon the following steps to help hold ourselves accountable to each other in the event that one of us repeatedly fails to attend meetings or complete promised tasks:

Step 1: Private email or call by Group Leader to the individual; this should be done in a spirit of support and sympathy, as people can have extenuating circumstances in their lives such as health, family crisis, etc.

Step 2: Failure to respond or repeated missing of meetings or work deadlines: Outstanding work will be reassigned and no new work or commitments taken on by that individual until he or she demonstrates that he or she is fully reengaged in the group. The Group Leader will inform the individual by private email in a polite and professional manner.

Step 3: Removal due to persistent absenteeism: If, having completed the first two steps, the individual remains unresponsive; the group will hold a vote regarding whether to remove the group member. In an affirmative vote, the individual is removed for the communication channels and public and private rosters and informed of these actions by the group leader. If the group votes to "give another chance" to that person, the conditions of that chance should be clear –i.e., attendance at meeting, delivery of specific work item, etc.—and the consequences, presumably removal, also made clear.

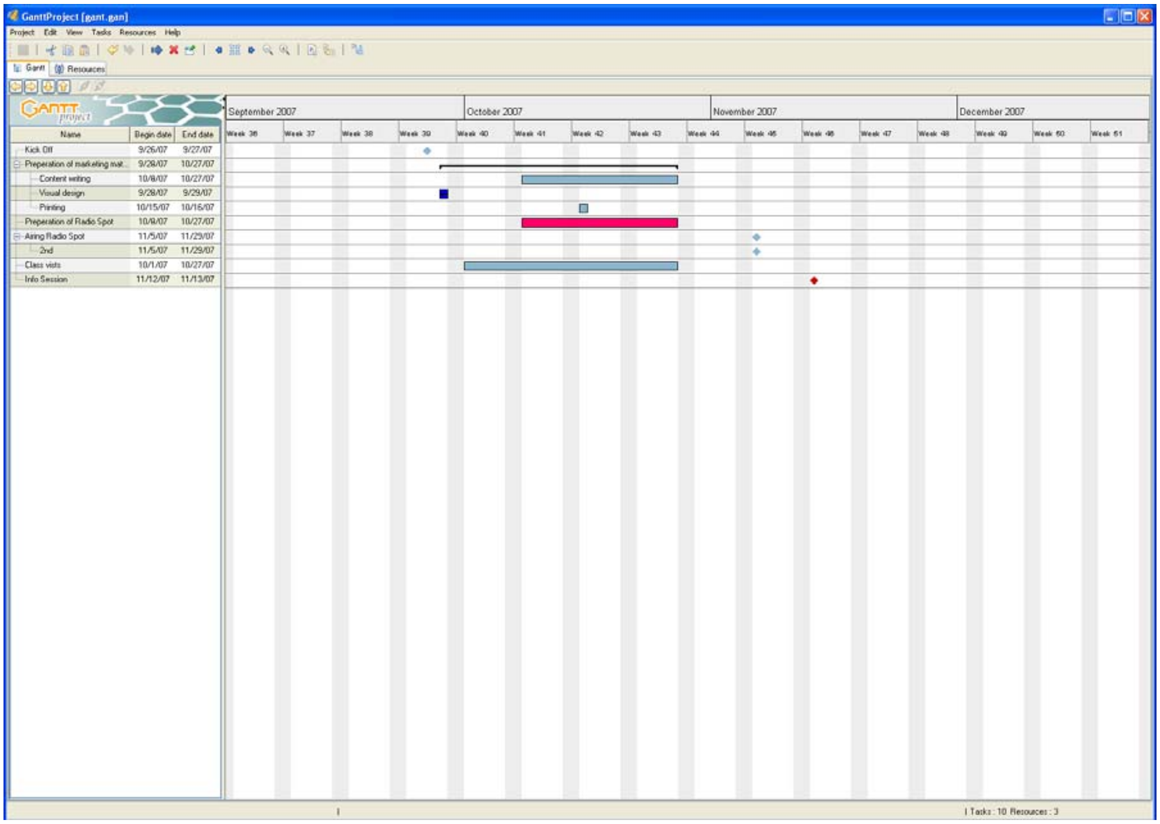
All communication with and about the individual must be respectful and professional at all times. The action will not be made public outside of the group nor will we communicate in such as way as to publically humiliate the person.

At all times throughout the process, individuals should feel free to withdraw from a group if they find that the work exceeds their expectations and this should be seen as a positive and mature acceptance of responsibility.

Download this template as a Word document from:
http://drupal.meltonfoundation.org/Follow-through/

4. Gantt Chart

This free program lets groups create Gantt charts, a valuable planning tool that charts projects across time and assigns responsibilities to individuals for each major task.



If you need assistance developing your group's Gantt chart contact the Follow-Through Solution Group at: mf_follow-through_sg@meltonfoundation.org

Download the program from:

www.ganttproject.biz

5. Implementation Calendar Template

A simpler alternative to the Gantt Chart, groups can adapt this sample template to their project timelines. (Replace your project tasks and activities with those in this sample "Movie Festival.") DL = Deadline

Actions	Mar.	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan
Select Movies				DL 26th							
Prepare Commentary							DL 24th				
Ship Movies							DL 1st				
Prepare Panel Discussions											
Design and Print Promo Flyers						DL 15th					
Design and Print Promo Posters						DL 15th					
Distribute & Post Flyers and Posters											
Promo meetings with collaborating campus organizations											
Obtain Copyrights											
Secure Venues											
Present Movies											
Meetings for Evaluation & Lessons Learned											
Prepare and Submit Grant Report											DL 1st

Download this template as a Word document from:

http://drupal.meltonfoundation.org/Follow-through

6. Task Tracker Template

A simple, easy-to-use excel form that lets you list tasks by people responsible for carrying them out, assign deadlines. Very useful to review and update at meetings to "track tasks!"

Task	Category	Lead	Delegate	Deadline
make hotel reservation [sample]	hotel and meals	Ronald	Donald	9/1
confirm all flight arrivals	travel	Winthrop	Tanja	10/15
confirm workshop speaker	speakers	Tanja	Patty	11/1
What other tasks?	*Category?*	*Person?*	*Person?*	*Date?*

Download this Excel template from:

http://drupal.meltonfoundation.org/Follow-through

7. Internal Communications Plan Template

Groups can use this template to agree among themselves regarding the types and frequency of communications needed. See "Communications" section of Follow-through Guidelines for advice regarding each technology.

Communication	Frequency	Person Responsible for Set-up or Maintenance	Comments
Face to Face Meetings			
Chats			
Copper Phone Meetings			
Webex Meetings			
Web or Drupal Site			
Email Channel/ Group			
Surveys (Survey Monkey)			
Other			

Download as a Word Document from:

http://drupal.meltonfoundation.org/follow-through

8. Budget Template

Adapt this template to the specific needs of your project; however this template should not replace any budget forms provided by specific grants or other projects

Admin & Operational	Itemized	Category	Totals
Office Supplies			
Shipping			
IT/Communications			
Phone			
Total Admin and Operational			**[subtotal]**
Program	Itemized	Category	Totals
Meeting Expenses			
Meetings Expenses			
Subtotal Meetings			[subtotal]
Publications			
Materials			
Materials			
Subtotal Program-related materials & publications			[subtotal]
Travel			
Travel			
Subtotal Travel			[subtotal]
Grants			
Grants			
Subtotal Grants			[subtotal]
Total Program			**[subtotal]**
GRAND TOTAL			

Other Resources

1. MF Granting Policy: http://www.meltonfoundation.org/grants
2. Eva Plus Guidelines: http://www.meltonfoundation.org/Meloffice/updocs.htm
3. An Introduction to Grant Reports: http://www.techsoup.org/learningcenter/funding/page7036.cfm
4. Mission Statements: What to avoid : http://www.dilbert.com/comics/dilbert/games/career/bin/ms.cgi
5. Open Source Project Management Software: http://www.openworkbench.org/
6. Software tools for NGOs: http://base.ngoinabox.org