Time Management: Managing by Calendar

The Bonner Community Engagement Curriculum

BWBRS Description: *Bonner Curriculum workshop teaches participants strategies for managing by calendar, a tool for sorting out competing and complex work assignments and prioritizing work.*

Overview: Managing by calendar is a great technique for managing your time and project. In brief, it allows the calendar and time you have available to be used as a backbone for organizing and driving how you spend your time. Used consistently, managing by calendar gives the project manager and team a tool for sorting out competing and complex work assignments and prioritizing work.

Category: Time management; Project planning and management; supervision; leadership skills

Level: Introductory (to higher level). It is recommended that all students at leadership level should go through this training.

Recommended Bonner Sequence: This training is recommended for Bonner students during their first year in the program, especially in connection with the time management baseline. Some of the activities can also be useful for higher level project management training, so it may be suitable to revisit this skill set again during training for upper level leadership positions.

First year students

Learning Outcomes:

- Participants will learn techniques for managing by calendar.
- Participants will have the opportunity to apply the basic tools to planning of their own projects.

Materials:

- Flip chart and markers
- Copies of included handouts

How to Prepare:

Review the trainer guide. Prepare handouts.
Review and modify scenarios to fit purpose and activities of participants.

How to Do/Brief Outline:

This outline is for an hour in this setting. The components include:

1)	Warm Up	suggested time 5 minutes
2)	Overview	suggested time 5 minutes
3)	A personalized introduction	suggested time 10 minutes
4)	The basic steps	suggested time 15 minutes
5)	Small group activity	suggested time 15 minutes
6)	Integration Round	suggested time 10 minutes
7)	Follow up and Close	suggested time 5 minutes

Part 1) Warm Up: Introducing Mr. Birthday
Suggested time: 5 minutes

Have post-its distributed and some portions of flip charts with calendar months in front of the room.

Here's the scenario to present to the group:

Some former service guru and crazy entrepreneur who never had a birthday party growing up has just given a large sum of money to be spent on a staff person whose job is to ensure that everyone has a special birthday party at his or her campus during the year. This person's job is to make sure all these birthday parties – which include a special visit from Chuck E. Cheese – get planned. So, first we need to know all the birthdays.

Please take a post-it and write down your own name and birthday, to get things going. Come to the front of the room and post your birthday on the appropriate flip chart, that is during the month that it falls into. Also, as you post your birthday, make sure it is in the right order (sequence) within that specific month.

Have everyone else do this as well, quickly.

Part 2) Overview
Suggested time: 5 minutes

Say something like, "Congratulations ladies and gentlemen, with the birthday game you have just completed your first experience with managing by calendar."

Introduce yourself and lead into the workshop:

Explain that managing by Calendar enables us to:

- Plan our work and work our plan
- Make time a friend, a helpful sorter of priorities
- Helps you to make what's important happen – by making time for what's important

Part 3) A Personalized Introduction
Suggested time: 10 minutes

Ask someone to share an example of something he/she always say he/she is going to start doing but never do. What's the reason? Usually it's, "I don't have time."

We've all got things like that – things we want to make time for and don't.

Go around the room and ask if anyone wants to share an example?

(Take a few)

You can frame the entire exercise, perhaps, by sharing the following thought.

- Some critics would suggest that we Americans or we in the West have an unhealthy relationship with time. We treat it as something we can "save" or "waste" or "stretch" or manipulate. But what we have control over, really, is what we do with our time – not how much we have of it.
- Time management is really about choosing your priorities, and assigning time to the things that matter most.

Now, you can bring the group back to the New Year's resolution exercise.

Begin by following up your own personal example:

"I said that my resolution is that I'm going to make more time for social engagements with friends. How could I put that on the calendar?"

Note ideas on flip chart:
1) Make dates for dinner with people.
2) Host a party at my house.
3) Make three trips to see friends this year.

Give everyone 2 minutes to write down 3 ideas of their own, using the prompting handout for help.

Now ask the group, *"If I need to turn the following 3 ideas into goals or events that are specific and countable, how could I do so?"*
1) Have a dinner engagement with friends at least once/month.
2) Host a party at house by April 1.
3) Make three trips to see friends this year, with the first happening by February 1.

"These dates can be somewhat arbitrary, but they will at least encourage me to act on the ideas."

Now, give everyone 3 minutes to take their ideas and put them into their own calendar for the year. Make sure people assign a concrete checkpoint for each idea. Take comments as you go along.

Part 4) The Basic Steps of Managing by Calender
Suggested time: 15 minutes

Next, you want to introduce the steps of managing by calendar, drawing back on your illustration as you do so.
1) Make a goal.
2) Assign a date or checkpoint to the goal (even if arbitrary).
3) Determine steps or components that lead towards the goal.
4) Using a calendar, assign critical steps first.
5) Assign the remaining steps dates/times.
6) Sort out conflicting/competing demands.
7) Adjust plan so it fits together.

Explain: Steps 4-7 don't always occur in the neat order above, as I'll soon illustrate.

You can use the following example (or create another):
1) Host a party at house.
2) Host a huge house party by April 1.
3) Steps:
   a. Set aside money for party ($100)
   b. Design invites
   c. Decide who to invite
   d. Send emails/make phone calls
   e. Confirm who's coming
   f. Decide a menu
   g. Get a DJ
   h. Go shopping for supplies
   i. Prepare food

4) Looking at those steps, I might decide that for the party to work out, people need to know at least two weeks in advance. So looking at the calendar for February and March, I see:
   a. First week of February
   b. Second week of February
   c. Third week of February

       d. Fourth week of February (remember, February often ends the 28th, except during Leap Years)

       e. First week of March

       f. Second week of March

       g. Third week of March

       h. Fourth week of March

       i. April 1 – house party!

- I see there are only seven weeks until the party. If I want to give people 2 weeks notice, I have to have the invites out by March 15 or so. That becomes one of the critical dates. I put that one up on the calendar. Then I start working with the others, putting them up in order.

- Uh OH! There are some competing things in this plan. I've got these on a different color post-it. Now, I've got to put these up and move the other ones around. We're out until mid-January on break. Then I've got some exams at the end of January. Then, I've got a planned trip for President's Day with family, also a priority. Then, there's a big national conference in mid-March. That means that unless I can squish the steps in to the time I am around or modify them, or engage other people to carry them out, it's not a doable plan.

Additional notes:

Even large goals can be Managed by Calendar. Break the big goal into parts, then go about planning ways to meet the sub-goals. This process makes meeting ambitious, daunting goals much more doable.

Part 5) Small Group Work Using Scenarios
Suggested time: 15 minutes

Here, you will be providing the participants with the opportunity to participate in a small group, using a scenario. You need to create as many scenarios as there are groups, and each group should have 3-6 people. The scenarios should be ones that apply to the group, and also that will later (in the Integration Round) be fit together into one calendar. Therefore, each scenario needs to have the same time frame, preferably no more than two months or ten weeks away. Each scenario should be similarly complex. Here are some for use:

Present general timeframe applicable to all groups and scenarios:

Your group will be the planning team for a given project or initiative. As such, you must determine key steps and deadlines that are necessary for a project to be successful. It is only 8 weeks until the start of your program/initiative.

Scenario A:
 You are the group in charge of MLK Service Celebration Project. This service day should involve roughly 500 freshmen in a day-long service project, beginning with an orientation to the community and followed by a reflection session led by a Service-Learning Professor on your campus. At this point, eight weeks out from the project, the only things set are that the Dean has promised 500 students will participate and the date is set. Also, the Community Service Director on campus has given you leads for 3-5 potential Service Partners who are used to working with the campus. The rest must be planned by you during these 8 weeks, to happen on _____ (assign date)

Scenario B:
 You need to plan some campus events that heighten people's awareness of cultural, ethnic, and racial issues. The Board of Trustees of the campus has mandated that a weekend roughly eight weeks from now be organized, to happen on _____(assign date, should be close to the date of the service day above, but not necessarily that same day). That weekend should include a variety of workshops, speakers, and educational opportunities for students. The campus Dean has promised that at least 250 students will attend. The campus administration and key student leadership has requested that the event involve local service partners, advocacy organizations, government officials and others with whom the campus regularly communicates and works. Other than assembling your group as the planning team and giving you access to space, some resources, and help from the administration, nothing has been set up.

Scenario C:
Your group is responsible for putting into place a new Community Advisory Board, made up of local leaders and public servants, including faculty and staff, community members, community partners, students, and others. This Board needs to be recruited and selected through a process that will be highly respected and regarded by the campus and community at-large. The campus's President has given you eight weeks to do this, as well as offered to help you set up meetings, make contacts, and even have some support from his office. The Board must kick off with a meeting eight weeks from now, the night before the big campus service day. There must be 6-8 members, and the process must include an application and interview of some kind. Other than that, your group

is responsible for designing the process and implementing it in this timeframe. What will you do? (Make sure you focus on the steps necessary, not on deciding how you will do the process or who should be on it).

Part 6) Integration Round
Suggested time: 10 minutes

Have each group present, briefly, the key elements of their 8-Week-Out plan. Each of the groups' plans should be hung next to each other, next to a large calendar.

Now, depending on time, you want to take the group into understanding how to integrate calendars. This subject could also be made the focus of a separate, longer workshop that builds on these skills in a more advanced way. Here, you may only be able to illustrate it and give some examples of how it works.

Share the following thoughts with the group:

- In actuality, managing time is difficult often because managers frequently have many important balls to juggle and limited time and resources. Calendar integration helps prompt choices about the sequence, priority, timing, etc. of project planning.
- For example, thinking of these scenarios, you can imagine that there are some key people such as the Community Service Center Director, student leaders, or Dean, who actually have to be involved in all of these projects. So to do so effectively, they need a calendar that works.
- The next step of Managing by Calendar is integrating the project plans and making the adjustments that are necessary for things to work. In reality, this skill is something that every person can do for his or her own multiple responsibilities – not just for a group or campus as in this scenario. For example, you personally might want a calendar for your social life, a calendar for your academic assignments, a calendar for your service responsibilities. By doing this, you can help yourself to be more effective at managing your own time and resources and avoid burn out, overload, etc.

Using the blank large calendar and markers/post-its, you want to put up the three main "final dates" from the scenarios. Illustrate the process of integration.

Part 6) Integration Round
Suggested time: 5 minutes

End with making some next steps for follow up – either for individual/group planning or more training/coaching.

Manage by Calendar
Planning Guidelines

Use the following steps.

1) Make or articulate the goal.

2) Assign a date or checkpoint to the goal (even if arbitrary).

(In these scenarios, steps 1-2 have already been done for you).

3) Determine steps or components that lead towards the goal.
   a. Consider program
   b. Consider logistics
   c. Consider people (key relationships or stakeholders)
      1. Suggested tool: BRAINSTORMS
      2. May want to delegate areas

4) Using a calendar, assign critical must steps first
      i. Suggested tools: 8 WEEK OUT CALENDAR
      ii. Also use regular format calendar and post-its

5) Then order remaining steps backwards and assign them dates/ time, working around or modifying other set priorities.
      Continue with:
      Suggested tools: 8-WEEK CALENDAR
      Also use regular format calendar and post-its

6) Sort out conflicting/competing demands.

7) Adjust plan so it fits together.

8 Week Planning Calendar

Eight weeks out
(Date:)

Seven weeks out
(Date:)

Six weeks out
(Date:)

Five weeks out
(Date:)

Four weeks out
(Date:)

Three weeks out
(Date:)

Two weeks out
(Date:)

One week out
(Date:)

Scenarios:

Scenario A:
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Scenario B:
 There has recently been an incident on campus that has made a lot of people express the need for some campus events that heighten people's awareness of cultural, ethnic, and racial issues. The Board of Trustees of the campus has mandated that a weekend roughly eight weeks from now be organized, to happen on _____(assign date, should be close to the date of the service day above, but not necessarily that same day). That weekend should include a variety of workshops, speakers, and educational opportunities for students. The campus Dean has promised that at least 250 students will attend. The campus administration and key student leadership has requested that the event utilize the help of local service partners, advocacy organizations, government officials and others with whom the campus regularly communicates and works. Other than assembling your group as the planning team and giving you access to space, some resources, and help from the administration, nothing has been set up.

Scenario C:
Your group is responsible for putting into place a new Community Advisory Board, made up of local leaders and public servants, including faculty and staff, community members, community partners, students, and others. This Board needs to be recruited and selected through a process that will be highly respected and regarded by the campus and community at-large. The campus's President has given you eight weeks to do this, as well as offered to help you

set up meetings, make contacts, and even have some support from his office. The Board must kick off with a meeting eight weeks from now, the night before the big campus service day. There must be 6-8 members, and the process must include an application and interview of some kind. Other than that, your group is responsible for designing the process and implementing it in this timeframe. What will you do? (Make sure you focus on the steps necessary, not on deciding how you will do the process or who should be on it).