



# Manage by Calendar: A Tool for Project and Time Management

**Overview:** This workshop provides an overview to the process of “managing by calendar” as a useful project management technique. Managing by calendar allows the time that one has available to drive the development of a work plan, rather than generating an unrealistic plan. This approach assists a project manager and team in sorting out competing and complex work assignments.

**Category:** People and project planning and management; leadership skills

**Level:** Beginner (though it can be adapted for a higher level). It is recommended that all students at leadership level should go through this training.

**Type:** Structured activities suitable for workshop (e.g. retreat or training) or for use during regular meeting structure

## **Focus or Goals of this Guide:**

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

## **Materials:**

- Post-it notes
- Flip chart and markers
- Copies of included handouts

## **How to Prepare:**

Review the trainer guide fully before facilitating this workshop. Prepare all handouts. Review and modify scenarios to fit the purpose and activities of participants.

## **How to Do/Brief Outline:**

This outline is for an hour in this setting, but it is generally better for it to be 1.5 to 2 hours long. The components include:

1. Warm-Up suggested time 5 minutes

2. Overview	suggested time 5 minutes
3. Personalized Introduction	suggested time 10 minutes
4. Basic Steps	suggested time 10 minutes
5. Small Group Activity	suggested time 15 minutes
6. Integration Round	suggested time 10 minutes
7. Follow-Up and Closing	suggested time 5 minutes

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## 1 Warm-Up

Suggested time: 5 minutes

Have a Post-it note distributed to each workshop participant and have pieces of paper labeled with calendar months in front of the room. Then introduce the following scenario:

*A former service guru /crazy entrepreneur who never had a birthday party growing up just donated a large sum of money to your organization for you to spend it on a staff person whose job it 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 himself – get planned. First, we need to know all the birthdays of everyone in your organization.*

*Please take a post-it and write down your name and birthday. Come to the front of the room and post your birthday on the appropriate flip chart.*

Have people do this quickly.

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## 2 Overview

Suggested time: 5 minutes

Introduce yourself and lead into the workshop:

- *Where this idea came from:* experience in having to plan many different projects with a variety of working teams with limited time and staffing; need to overcome the challenges of complex time management
- *Why it works:* provides a way of organizing tasks by working backwards; forces you to see problems; allows you to set objectives for projects that you have no idea how long or how hard they will be and adjust accordingly; allows you make decisions based on the time you have.

Managing by a calendar enables us to:

- Plan out work and work out our plan
  - Sort priorities according to time
  - Ensure that what is important happens by making time for what's important
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### 3 Personalized Introduction

Suggested time: 10 minutes

Share an example of something you always say you are going to start doing, but never do. What's the reason? Usually because you think that you don't have time.

*We've all got things like that – things we want to make time for, but don't.  
Who wants to share an example?*

*Does anyone have a New Year's Resolution to share? How are you doing on it? (Take a few)*

*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.*

*Now is your chance to plan making some time for the things that matter to you.*

Illustrate with your own personal example:

*I said that my resolution is 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 two minutes to write down three things of their own that they wish they had time to do, using the "Planning Guidelines" handout for help (found at the end of this guide).

*Now, if I need to turn these 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 a month.
2. Host a party at house by August 1.
3. Make three trips to see friends this year, with the first happening by July 4.

*As you see, these dates can be somewhat arbitrary, but they will at least encourage me to act on the ideas.*

Now, give everyone three 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 some comments from people.

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### 4 Basic Steps

Suggested time: 10 minutes

That personalized introduction allows us to do the first few steps of what can be a simple or complex process of managing by calendar. Now, I am going to lay out the steps – using an example. (You may or may not use an example from group – if time, do both a personal example and a group example. Otherwise do personal example.) *Does anyone have an example of a project you have been working on that requires a timeline and series of steps and processes? For example, it could be organizing an event of some kind or starting an organization, etc.*

Let me illustrate by using my #2 goal of having a party at my house by August 1.

Present the steps:

1. Make a goal.
2. Assign a date or checkpoint to the goal (even if arbitrary).
  - a. When planning a campus event, it is very important to keep the academic/class calendar in the front of your mind. Remember to plan around mid-terms, finals, special campus events, regularly scheduled occasions on your campus, etc.
3. Determine steps or components that lead towards the goal.
4. Using a calendar, assign critical steps first.
5. Order remaining steps by first figuring out when you want to do in the last step, and then working backwards from there, and assign each step appropriate dates/time, working around or modifying other set priorities.
6. Sort out conflicting/competing demands.
7. Adjust the plan so it fits together.

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

Example:

1. Host a party at my house.
2. Host a party at my house by August 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. Go shopping for supplies
  - h. 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 June and July, I see:*
  - a. Week of June 11-15 (plus money I've saved in the bank until now, and money that I will get in the coming weeks)
  - b. Week of June 19-22
  - c. Week of June 25-29
  - d. Week of July 2-6
  - e. Week of July 9-13
  - f. Week of July 16-20
  - g. Week of July 24-28
  - h. Week of PARTY – July 30-August 3

- *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 July 16 or so. That becomes one of the critical dates. I write all of these things on post-its. Then I put that one up on the calendar. Then I start working with the others, putting them up in an order*
- *Uh oh! There are some competing things in this plan. I've got these on a different color post-it's. Now, I've got to put these up and move the other ones around. I'm here until the 17<sup>th</sup>. Then I've got some meetings the week of the 25<sup>th</sup>. Then, I've got a planned family trip for July 4<sup>th</sup>, also a priority. That means that unless I can squish the steps in between July 9-July 31, or modify them, or engage other people to carry them out, it's not a doable plan.*

Additional notes:

Yes, this can be done with a large goal that needs to be broken into checkpoints, for example recruiting 50 student volunteers or writing 30 trainings or saving \$1000. Break the big goal into parts before going about planning ways to meet the sub-goals. This process makes meeting ambitious, daunting goals much more doable.

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## 5 Small Group Activity

Suggested time: 15 minutes

Split the participants up into small groups of three to six people. Create as many scenarios as there are groups. The scenarios apply to the group and 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 necessary for a successful project. It is only 8 weeks until the start of your program.

### **Scenario A:**

You are the group in charge of Freshmen Orientation Service Day. This service day should involve roughly 500 freshmen in a day-long service project, beginning with a community orientation, 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 the date and that the Dean has promised that 500 students will participate. Also, the Community Service Director on campus has given 3-5 potential Service Partners who are used to working with the campus. You must plan the rest for these 8 weeks, so that the service day can happen on \_\_\_\_\_ (assign date)

### **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 has mandated that an awareness weekend roughly eight weeks from now, 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 have 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 well-regarded by the campus and community at-large. The campus' 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 her 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 selection 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 involved in it. Since this exercise is in planning, the focus should remain on planning, while the group should also note that attention needs to be paid later to these "how" and "who" questions.)

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## 6 Integration Round

Suggested time: 10 minutes

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

Now, depending on available time, help the group understand how to integrate the 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 provide some examples of how it works.

Explain what an integrated calendar is:

- Managing time is difficult often because managers frequently have many important things going on in their lives and have limited time and resources. Calendar integration forces use of the calendar to help make choices about the sequence, priority, timing, etc. of project planning.
- For example, thinking of these scenarios, 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. 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 necessary adjustments. 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, and a calendar for your service responsibilities. By going through this process, you can help yourself to be more effective at managing your own time and resources and avoid problems like burn out, overload, etc.

Using the blank large calendar and markers/post-its, put up the three main “final dates” from the scenarios. Illustrate the process of integration as illustrated in section 4.

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## 7 Follow-Up and Closing

Suggested time: 5 minutes

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

## Planning Guidelines

- 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)
      - i. Suggested tool: BRAINSTORMS
      - ii. May want to delegate areas
  - 4) Using a calendar, assign critical must steps first
    - a. Suggested tools: 8 WEEK OUT CALENDAR
    - b. Also use regular format calendar and post-its
  - 5) Then order remaining steps first figuring out when you want to do the last step, and then working backwards from there, and assign each step dates/time, working around or modifying other set priorities.
    - a. Suggested tools: 8 WEEK OUT CALENDAR
    - b. 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:

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