

# Section Seven

## Planning Sheets and Forms

The following planning sheets have been discussed in various sections this manual. For your convenience, we have collected them together and placed them in this section so that they are easy to find. Please feel free to photocopy them and use them in your projects.

1. Project Definition (from Section 3 *Focusing on the Outcome*)
2. Risk Management Analysis (from Section 3 *Focusing on the Outcome*)
3. The Six Rules of Brainstorming (from Section 4 *Planning for Project Success*)
4. WBS Sheets (from Section 4 *Planning for Project Success*)
5. Resource Usage (from Section 5 *Conducting and Reviewing the Project*)
6. Gantt Chart Forms (from Section 5 *Conducting and Reviewing the Project*)
7. A Meeting Checklist (from Section 5 *Conducting and Reviewing the Project*)
8. Meeting Conduct Sheet (from Section 5 *Conducting and Reviewing the Project*)
9. Meeting Agenda (from Section 5 *Conducting and Reviewing the Project*)
10. Meeting Agenda – Email Format (from Section 5 *Conducting and Reviewing the Project*)
11. Hints for Effective Meeting Minutes (from Section 5 *Conducting and Reviewing the Project*)
12. DETYA Project Report Format (from Section 5 *Conducting and Reviewing the Project*)
13. Team Communication Plan (from Section 6 *Enhancing the Project*)





Project Objectives: **(the project outcomes)**

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Project Deliverables: (how you will know when the project is completed)

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Project Constraints: **(definite obstacles that will impede progress)**

**Constraint**

**Strategy**

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Project Risks: **(factors that might impact on project progress)**

**Risk**

**Strategy**

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Resources Available:

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Budget Issues:

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Further Detail/Action:

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Project Start\_\_\_\_\_

Project End\_\_\_\_\_

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# The Six Rules of Brainstorming

## 1. There Should be No Criticism

No person should be criticised for any ideas offered. Judgment should be suspended until later when **all** ideas generated during the brainstorming session are evaluated. If a person's ideas are criticised he/she is unlikely to contribute freely to the session and will be more reluctant to suggest other ideas.

## 2. Freewheeling Should be Encouraged

The wilder the better; offbeat, zany and impractical suggestions should all be accepted. These wild suggestions often “trigger” off practical ideas that may not otherwise occur.

## 3. The More Ideas the Better

The greater the number of ideas, the greater the likelihood of finding a solution. When all ideas seem to have dried up, go around the group again and ask for one more suggestion from each person. It is easier to reduce a long list than expand a short one.

## 4. Everyone Should Have an Equal Chance to Participate

In order that the more confident members of the group do not dominate the others; everyone should be allowed to contribute in turn. If someone has no idea to offer at that moment they should say “pass”. On the next time around they may have a worthwhile idea to contribute. It is good idea to jot down any good ideas while waiting so they so they are not forgotten.

## 5. All Ideas Should be Recorded

One person should act as the recorder so every idea is written up in full view as the session proceeds. The recorder should not change the wording of the contributor, or alter the meaning if it is necessary to shorten something.

## 6. Let the Ideas Incubate

The result of the brainstorming session should be allowed to incubate. It may be a good idea to allow people time to absorb the various ideas until the following meeting. This also allows time for any additional ideas.

The next step is to eliminate all the “wild” ideas from the brainstorming list, then from the remaining list set up a priority list from the ideas that are related to the problem.







## A Meeting Checklist

### BEFORE

CHAIRPERSON	ATTENDEES
<ul style="list-style-type: none"><li>• Determine Objectives</li><li>• Determine Participants</li><li>• Prepare Agenda</li><li>• Organise Meeting Place</li><li>• Do any preparation required</li></ul>	<ul style="list-style-type: none"><li>• Confirm Your Attendance</li><li>• Decide what is required of you</li><li>• Decide what you want from the meeting</li><li>• Do any preparation required</li></ul>

### DURING

CHAIRPERSON	ATTENDEES
<ul style="list-style-type: none"><li>• Be punctual</li><li>• Stick to the Agenda</li><li>• Retain Control</li><li>• Ask questions</li><li>• Keep the meeting brief</li><li>• Summarise results</li></ul>	<ul style="list-style-type: none"><li>• Be punctual</li><li>• Listen</li><li>• Participate</li><li>• Don't wander off the subject</li><li>• Ask questions</li></ul>

### AFTER

CHAIRPERSON	ATTENDEES
<ul style="list-style-type: none"><li>• Assess your performance</li><li>• Follow up promptly on any items you are required to action</li><li>• Ensure others do the same</li></ul>	<ul style="list-style-type: none"><li>• Assess your performance</li><li>• Follow up promptly on any items you are required to action</li></ul>

## Meeting Conduct Sheet

<b>MEETING PURPOSE</b>			
DATE:	START:	END:	LOCATION:
Attendees:			
_____			
_____			
_____			
Apologies:			

No	Time	AGENDA	ACTION		

Related Issues:          
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# Meeting Agenda

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## Notice of Meeting

### Attention

- Julie Armstrong
- Basil Flemmings
- Sue Richards
- Ross Wilson
- Hassan Omar

A meeting will be held on 10 October 2001 at 10.00 a.m. in meeting room 1 for the Psychology on Line project team.

### Agenda

1. Apologies
2. Minutes of Last Meeting
3. Matters arising
  - Progress on computer trials
  - Programming efficiencies
4. Issues for this meeting
  - The results of the software trials
  - Managing study leave commitments
  - Report on Monthly progress to TLC
  - New course structures
5. Any other business or issues
6. Date of next meeting

Jo-Anne Smith  
**Project Manager**  
**10 October 2001**

# Meeting Agenda – Email Format

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## Notice of Meeting

For

- .....
- .....
- .....
- .....
- .....
- .....
- .....

A meeting will be held on ..... at ..... a.m./p.m.  
in.....

## Agenda

1. Apologies
2. Minutes of Last Meeting
3. Matters arising
4. Issues for this meeting
5. Any other business or issues
6. Date of next meeting

Signed .....

Position.....

Date.....

# *Hints for*

## *Effective Meeting Minutes*

- 1. Take concise and appropriate notes to ensure an accurate record of the meeting**
- 2. Prepare minutes so they reflect the true and accurate account of the meeting**
- 3. Format minutes to include Actions**
- 4. Make sure Actions are signed off by nominated participants**
- 5. Give everyone a copy of the minutes .... At the meeting**

**Take notes:**

# DETYA Project Report Format

**Title page**

**Executive Summary**

**Project Overview**

**Introduction**

**Justification Rationale for Project**

**Target Group**

**Details of Program**

**Overview**

**Sequence of activities**

**Project Conclusion**

**Evaluation**

**External Project Dissemination**

**Conclusion**

**Appendices**

## Team Communication Plan

<u>Team member</u>	<u>Role</u>	<u>Preferred method of communication</u>	<u>email /phone</u>
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**Responsibilities**

**Meeting times (electronic/in person)**

**Potential communication issues**

# Section Eight

## References and Websites

### 8.1 Other Areas of Information

#### **Project Management Body of Knowledge (PMBOK)**

If you were to eavesdrop on a group of Project Managers discussing project management, one of the terms which you will hear them using consistently is the “Project Management Body of Knowledge” or “PMBOK”. The PMBOK is the term used to describe the “sum of knowledge within the profession of the project management.”

The PMBOK includes proven traditional practices which have been successfully applied around the world as well as innovative and advanced techniques which have had limited use and exposure. It is produced by the Project management Institute (PMI) and draws its knowledge from a diverse range of bodies of knowledge including:

- general management;
- technical or industry;
- supporting disciplines.

The PMBOK is a reference for a basic project management techniques and practices and is used by project management associations such as the Australian Institute of Project Management (APIM).

#### **Numerix Pty Limited**

Numerix Pty Ltd is a commercial consulting organisation that we recommend, particularly for MS-Project Training. The contact details for the company is:

Numerix Pty Limited  
Suite 2 Level 1,  
160 Clarence Street  
Sydney NSW 2000  
numerix@comcen.com.au

#### **UNE Partnerships Pty Ltd (UNEP)**

UNEP is the Education and Training Company of the University of New England. It is one of Australia’s most progressive training, education and development providers, specialising in vocational training, education and development that meets the needs of individuals and organisations while at the same time opening doorways to further competence, career and qualifications.

UNEP is a Registered Training Organisation (RTO No. 6754) and is endorsed by ANTA to deliver a Certificate Level 4, Diploma and Advanced Diploma in Project Management. The training provided by these courses meets the project management national competencies endorsed

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Internet [www.unepartnerships.com.au](http://www.unepartnerships.com.au)

## 8.2 Websites

### **Project Management – LINKS**

Magazines –Project [Project Management Home Page [Serendipity] Updated 30 August 1996. Copyright 1996 Asterisk Design Partnership

<http://www.asterisk.co.uk:80/project/Pmlinks.html>

### **Project Management**

This site contains items of interest to the project management community, but it is primarily the home of Project, the magazine of the Association for Project Management (APM). For a full copy of the magazine you will need to be a member of the APM, or you can subscribe to the magazine without being a member.

<http://www.asterisk.co.uk:80/project/Pmgen.html>

### **Trends in Project Management Systems**

Trends in Project Management Systems Trends in Project Management Systems A White Paper by HMS Software Author: Chris Vandersluis President, HMS Software © 1994 Heuristic Management Systems Over the

<http://www.cam.org/-hms/wp/prntrends.html>

## Choosing Project Management Software

Choosing Project Management Software Choosing Project Management Software for Your Organisation A White Paper by HMS Software Author: Chris Vandersluis President, HMS Software © 1994 Heuristic Manage

<http://www.cam.org/-hms/wp/choosing.html>

## Project Management and Project Risk

Project Management and Project Risk. Project Management Project Risk Introduction End-User (and management) Perception Management Challenges Portfolio Analysis Effect on implementation risk. Tools of Project Management Maximising potential project success Comparison of System Development approaches System Development Life Cycle. The Prototyping Process Other approaches.

<http://www.channell.com:80/users/francis/CSS118/project/index.htm>

### 8.3 Journals

Australian Project Manager

Australian Project Management

Australian Institute of Project Management

The British Institute of Project Management

International Journal of Project Management

European Project Management

PMI Network

American Project Management

Engineering Management Journal

### 8.4 Useful Project Management Organisations

Project Management Institute  
- Melbourne Chapter

<http://www.pmi.org/chapters/australia/>

Australian Institute of Project  
Management (AIPM)

<http://www.aipm.com.au/head/portal/home>

Project Management Institute

<http://www.pmi.org/>

International Project Management  
Association (IPMA)

<http://www.ipma.ch/>

## 8.5 Useful Project Management User Groups and Resources

Project User Group	<a href="http://www.mpsug.com/">http://www.mpsug.com/</a>
The Web site for Users of Microsoft Project	<a href="http://www.msproject.com/">http://www.msproject.com/</a>
The Project Management Forum	<a href="http://www.pmforum.org/warindex.htm">http://www.pmforum.org/warindex.htm</a>
Project Management Resources	<a href="http://www.jump.net/~hollyt/PM.html">http://www.jump.net/~hollyt/PM.html</a>
ProjectNet 0 the world of Project Management	<a href="http://www.projectnet.co.uk/">http://www.projectnet.co.uk/</a>
ProjectZone	<a href="http://www.projectzone.com/">http://www.projectzone.com/</a>
The Busy Person's Project Management Book	<a href="http://www.ozemail.com.au/~thomsett/book/busy_book.htm">http://www.ozemail.com.au/~thomsett/book/busy_book.htm</a>

## 8.6 Useful Project Management Software Downloads

Microsoft Project 98	<a href="http://www.microsoft.com/office/project/default.htm">http://www.microsoft.com/office/project/default.htm</a>
Primavera Systems	<a href="http://www.primavera.com/">http://www.primavera.com/</a>
Project Schedules 7	<a href="http://www.scitor.com/ps7/">http://www.scitor.com/ps7/</a>

Add your own websites here:

Address:

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