Staying on Track

Description:

This tool provides approaches to helping your teams plan and stay on track to complete their work.

How it can be used:

When you begin the process of accreditation, you may feel overwhelmed by the amount of work that needs to be accomplished by your teams. This tool provides three approaches to help articulate the tasks, organize the workload, assign responsibilities, and keep track of progress.

Providing clear assignments and tools for tracking ensures that your staff understands what needs to be done so they can make informed commitments. And committed employees mean that the accreditation tasks will get done. It's a win/win.

Approach One – Ask for Volunteers

This allows people to come forward to handle the type of tasks they are good at and like to do. As a group, this works best if everyone is keen and committed to get the tasks completed. As a leader, this communicates that you trust your team to step up and accept the responsibility to complete the tasks.

1. Ensure group members understand they are part of a team that will be implementing; in other words an 'action team'.
2. Include the team in creating the large tasks and individual steps.
3. Ask "How shall we divide up the tasks to get all the steps accomplished?"
4. If a few difficult steps are not volunteered for, consider whether or not they can be divided into smaller more manageable (or appealing) steps.
5. If you are concerned about anyone in particular being able to complete their tasks, you can speak with them privately. The important thing is that the team feels that you trust them to complete the work.
6. Set the next meeting time and clarify exactly what is expected by that time.

What to do if:

- People are reluctant to volunteer – encourage members of the group to hold each other accountable for tasks. It is better that your employees feel nudged to participate by their peers than from their boss. Another suggestion is to put names in a hat to draw and create teams. Sometimes randomly selected teams can break down the tendencies to work with friends. Effective and positive work teams can be formed using this method.
- The assignment of tasks seems unrealistic – at the end of the session, ask the group if the task feels realistic and 'doable'. Let the group discuss and reorganize if necessary.
- There are difficulties in getting tasks completed – meet individually with staff as required. If there are actual logistical or implementation issues, ask what the team can do to help. This is more effective than "Why hasn't this been done?"

Approach Two – What/Who/When Cards

This approach effectively clarifies the individual steps needed to complete a task, the name of the person who will complete it and the date by when it will be completed. This helps people who have trouble imagining how all the larger activities will be completed. It takes time at the front end of planning but can save a lot of time down the road. This is effective when used with the Timeline (Approach Three).

1. Prepare blank What/Who/When cards in advance. (3"x5" size work well)

WHAT	
WHO	WHEN

2. Pass out the cards to each group.
3. For each project or large activity, have everyone brainstorm at least ten to fifteen steps it will take to accomplish the activity.
4. Write the steps on the cards, one step per card.
5. Have individuals volunteer for the tasks to be done and write their names on the cards in the "Who" section.
6. Have the teams lay the cards out on the table or post on the wall to help clarify the flow or sequence of the tasks and help identify the "When". When this makes sense, fill in dates for each of the cards.

What to do if:

- Only one or two cards are identified to carry out a full activity – ask probing questions to help the group break the activity down into manageable steps. For example, if one of the activities is to host a community engagement session to provide feedback on your health services, ask questions such as:
    - "Who needs to be contacted?"
    - "How will they be contacted?"
    - "Where will it be held?"
    - "Who will do the presentation?"
    - "What do they need to develop the presentation?"
    - "Who will record the feedback?"
    - "Who will set up the room?"
    - "Are there going to be refreshments?"
    - "Who will clean up?"
    - "How will we report back to the community?" etc.

  This helps people to visualize the many steps it takes to achieve one activity.

- The breakdown of responsibilities isn't even – review the distribution of the tasks. Allow the group to redistribute. If tasks are still dramatically uneven, ask whether this is realistic and gently suggest that tasks might need to be shifted to ensure that everything is completed on time.

Approach Three – The Timeline

This can be a valuable tool in laying out what tasks need to be completed and by when. It also highlights possible dependencies between tasks (i.e., what needs to happen before or after other tasks). Complete the timeline to cover several months or a year to give people clarity around the big picture. If necessary, you can then do smaller timelines with shorter periods to allow for more detail. A comprehensive timeline created for all teams will help people see how they and their work fit into the big picture.

1. Using 5”x8” cards, identify the major projects or activities down the left side of a wall. Place cards across the top of the wall representing the months (or weeks if you are looking at a shorter timeframe).
2. If you haven’t already developed cards using Approach Two (What/Who/When cards) then create cards that identify all the steps for each project or activity. Place them in the appropriate space (along the row of the project and under the appropriate month). See the example at the bottom of this page.
3. When the entire picture is up on the wall, have everyone stand back and ask “What do you notice?” or “What does this timeline reveal to us?”
4. If too many tasks occur in the same week, review whether that is necessary and revise if required. Ask “What changes would make this timeline more realistic?”
5. Check if there are any duplicate tasks or steps. Ask “Do you see any duplication?” or “What steps/tasks could be combined?” or “Where are the timing conflicts?”
6. Refrain from making suggestions yourself. Instead, ask questions to put responsibility for decisions back on the teams. This supports their ownership of the process and the results.
7. Ask the group to stand back and imagine it has reached the end of the process with all tasks completed. Ask “Where will we be at that point?” This helps people visualize the accomplishment at the end of the process

What to do if:

- The overall flow isn’t making sense – ask probing questions to help the group see the gaps. Ask “What do you notice?” “Are there any gaps?” and, if necessary, “Are there any spots where some extra steps would help facilitate the flow?”

TIMELINE						
	JAN	FEB	MAR	APR	MAY	JUN
PROJECT ONE	□□□	□□	□□□□	□□	□□□□	□□□□
PROJECT TWO	□	□□□	□□	□□□□	□□	□□□
PROJECT THREE	□□	□	□□□	□□□	□□□	□□
PROJECT FOUR	□□□	□□□□	□	□□	□□□	□