Project Management Overview
Table of Contents

Project Plan Tool Overview

The Project Plan tool was developed to assist churches in managing their safety-related tasks. There are two ways to get started creating a project plan:

1. **Assessment tool generated.**
   You can create a project plan when you are using the **Risk/Safety Assessments** tool. The Project Plan tool was developed to work in association with the Assessment tool. For every recommendation that is made as you respond to questions in the assessment section of this site, a corresponding task or tasks will populate a project plan.

2. **Project generated.**
   You can also create a project plan outside the Risk/Safety Assessments tool by clicking the **Project Management** tab at the top of the SafeChurch site. If you choose this option, all tasks from the assessment tool will still be entered into the project plan; or you can start with a blank project plan by selecting the **General** category.

Project Categories

Even though project plans can be created two ways, the structure of the plan development is the same. Just like the Risk/Safety Assessment tool, project plans are divided into seven categories: Starting a Safety Ministry, followed by the six risk categories identified using the EFFECT framework, which you will see within the Assessment Tool and in the Resources section of the SafeChurch site:

1. Starting a Safety Ministry
2. **E**mergency Preparedness
3. **F**acility Safety
4. **F**inancial Safeguards
5. **E**mployee and Volunteer Safety
6. **C**hildren and Youth Safety
7. **T**ransportation Safeguards

As you create a project plan, you can use these categories to help you group the risk management goals you have for your church into tasks and subtasks that you can prioritize and to which you can assign due dates and staff.

> **Note:** If you create a project plan outside the tool, you will also see a **General** category. If selected, you can start with a blank plan.

Separate instructions for creating an *Assessment Tool Generated Project Plan* and a *Project Generated Project Plan* follow.

Assessment Tool Generated Project Plan

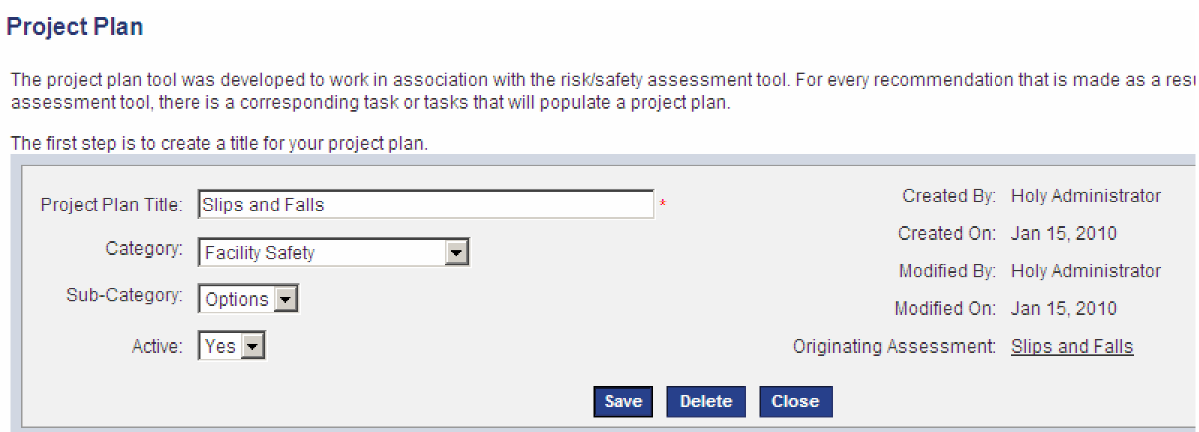
Creating the Project Plan

Step 1

Click the **Create Project Plan** option that appears after a risk/safety assessment has been completed.

Step 2

The Project Plan screen below will appear



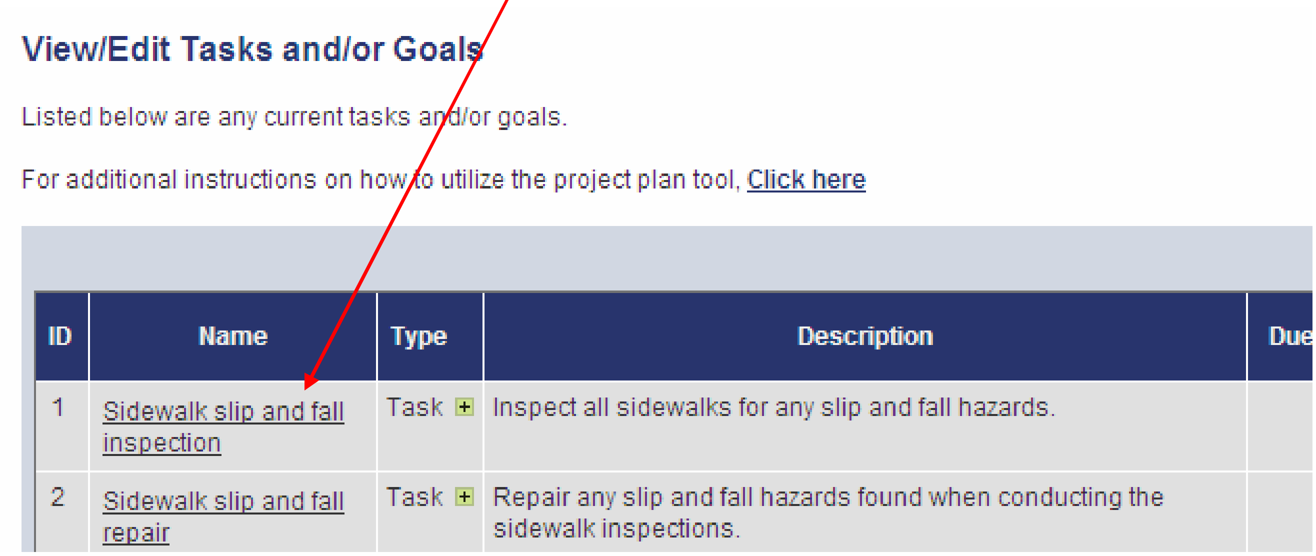
1. Project Plan Title (Required field).
    - The plan title will automatically default to the type of assessment that was taken. However, this title can be edited as desired. **Example title:** If you completed a Facility Safety (category) Water Damage assessment, and you need to take an action as a result, the title for the Plan could be *First United Church – Water Damage Repair.*
2. Select the corresponding Category and Sub-category (Optional fields)
3. Is the project Active? (Optional)
    - Default is Yes. If you do not want this task to be active, select No.

    Note that the right of the screen populates with originating information and dates for creation (and modification, when applicable).
4. Click the Save button.

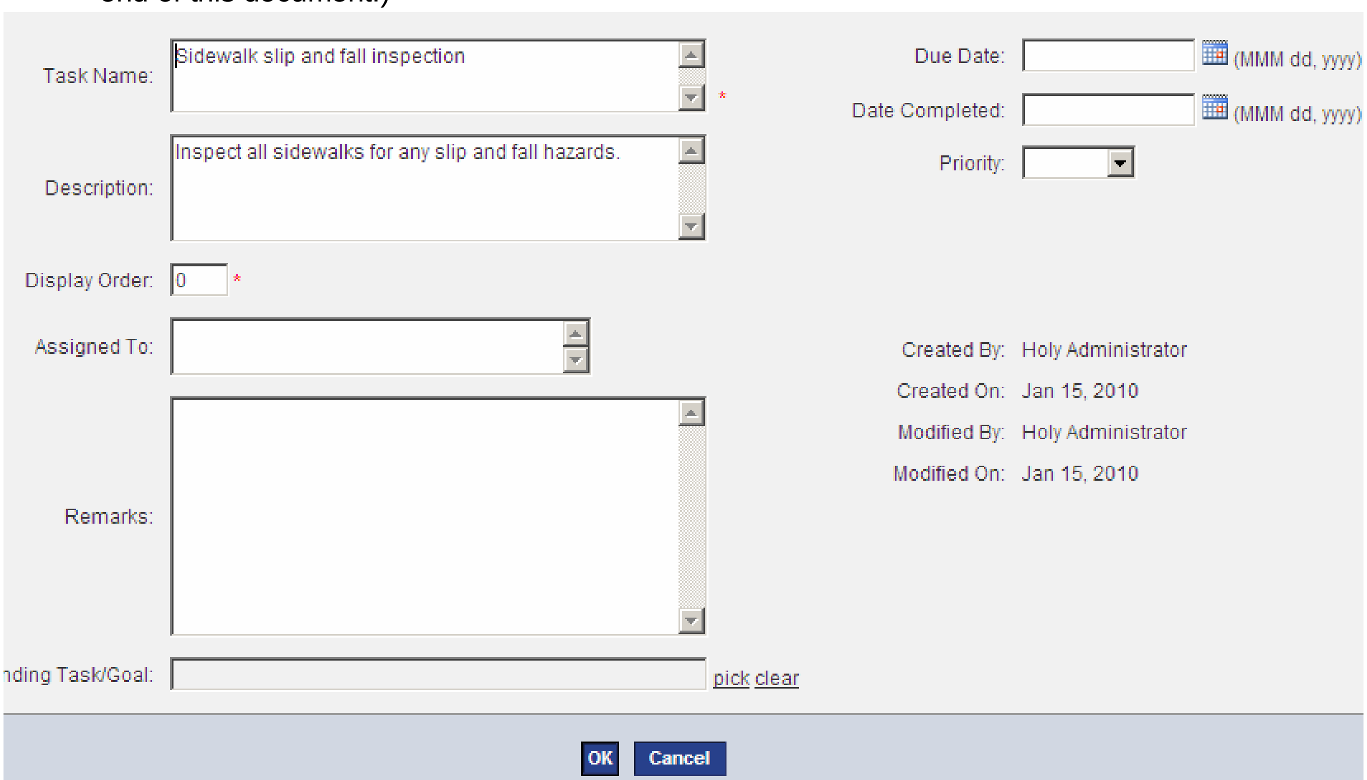
Step 3

Once you have named the project plan, the next step is to view/edit any additional detail associated with the generated tasks.

1. To view/edit a task, click on the task name. The screen will expand to show additional project plan fields.

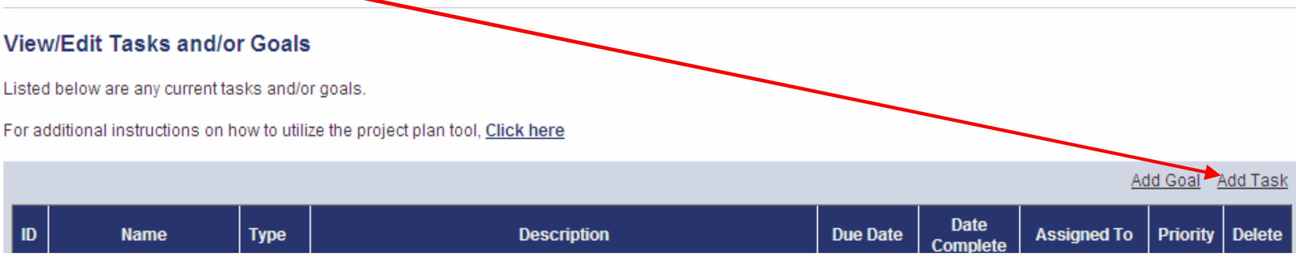


2. Complete the relevant fields, and then click the **OK** button to save your information. (To learn more about these fields, please see the *Project Plan Field Definitions* at the end of this document.)

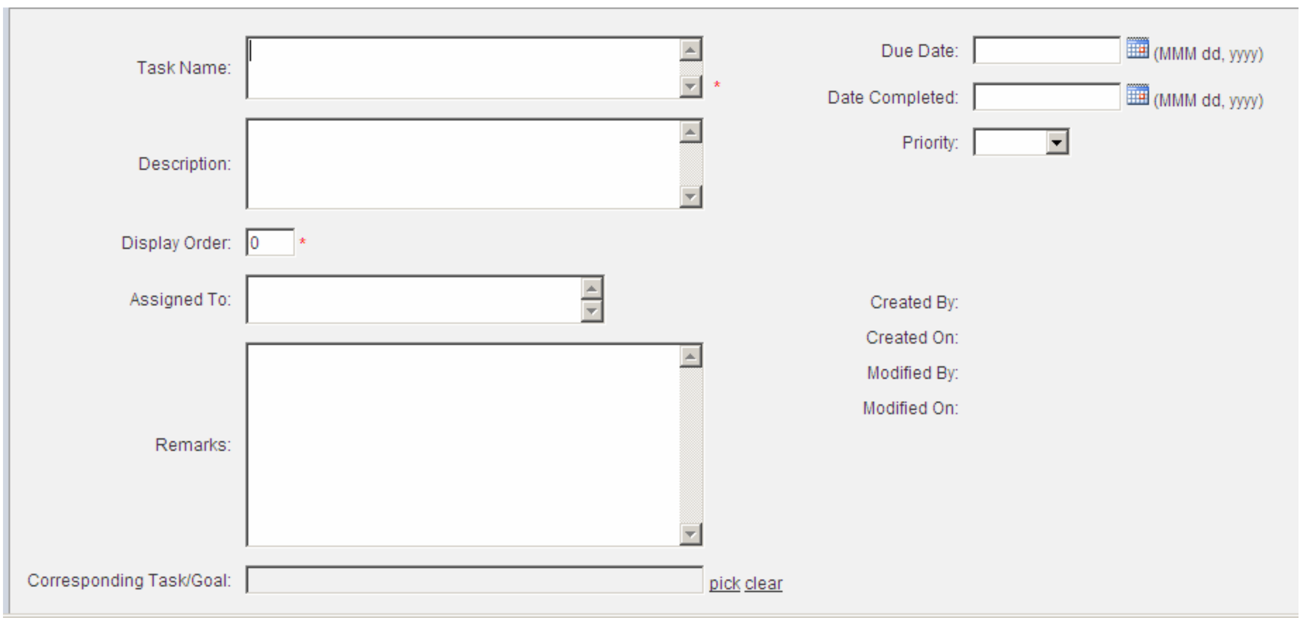


Step 4

In many instances, the assessment generated tasks may not be enough to accomplish the goal of completing the safety recommendations. In these instances, additional tasks can be added by clicking the **Add Task** link at the bottom right of the screen.



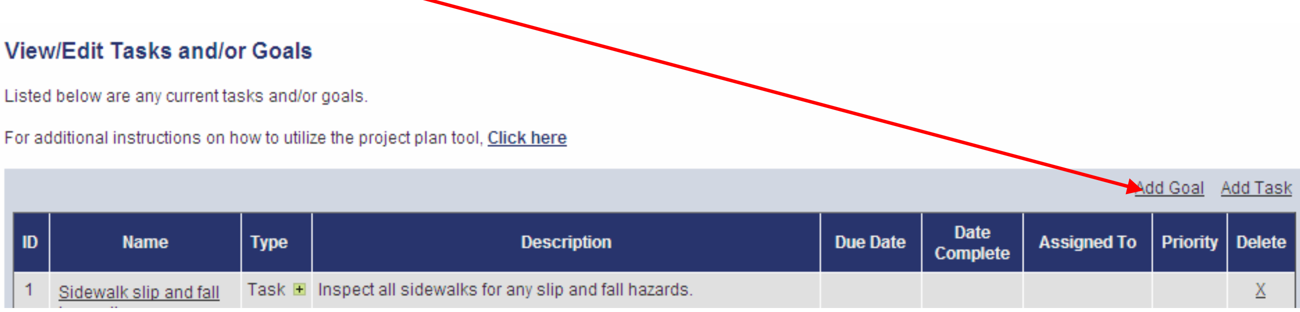
The screen below will appear. Complete all relevant fields.

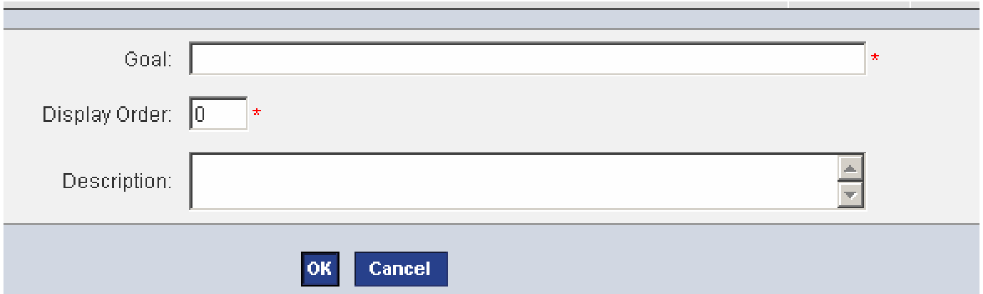


Step 5

A goal is an optional field that can be used as a method of assigning various tasks as sub-tasks of that goal.

1. To add a goal, click the **Add Goal** link at the right of the screen.





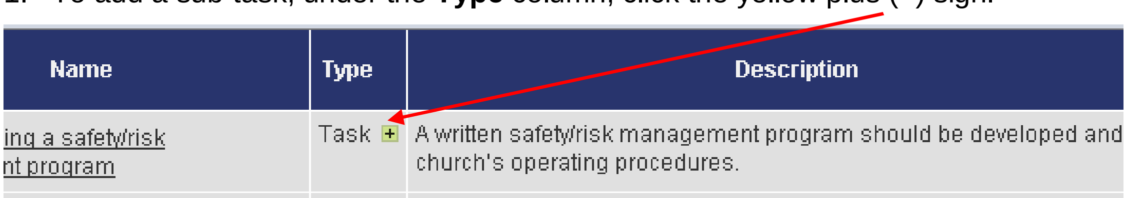
2. **Goal** field (Required), enter a name for this goal.
3. **Display Order** (Required), enter a number for the goal.

   If this is the only goal you have, then the diplay order should be 1. A display order of 1 will appear close to the top of the project plan table. If additional goals are added, the display order for each goal should be 2, 3, and so on.
4. **Description** (Optional), enter a description of this goal. When finished, click **OK**

Step 6

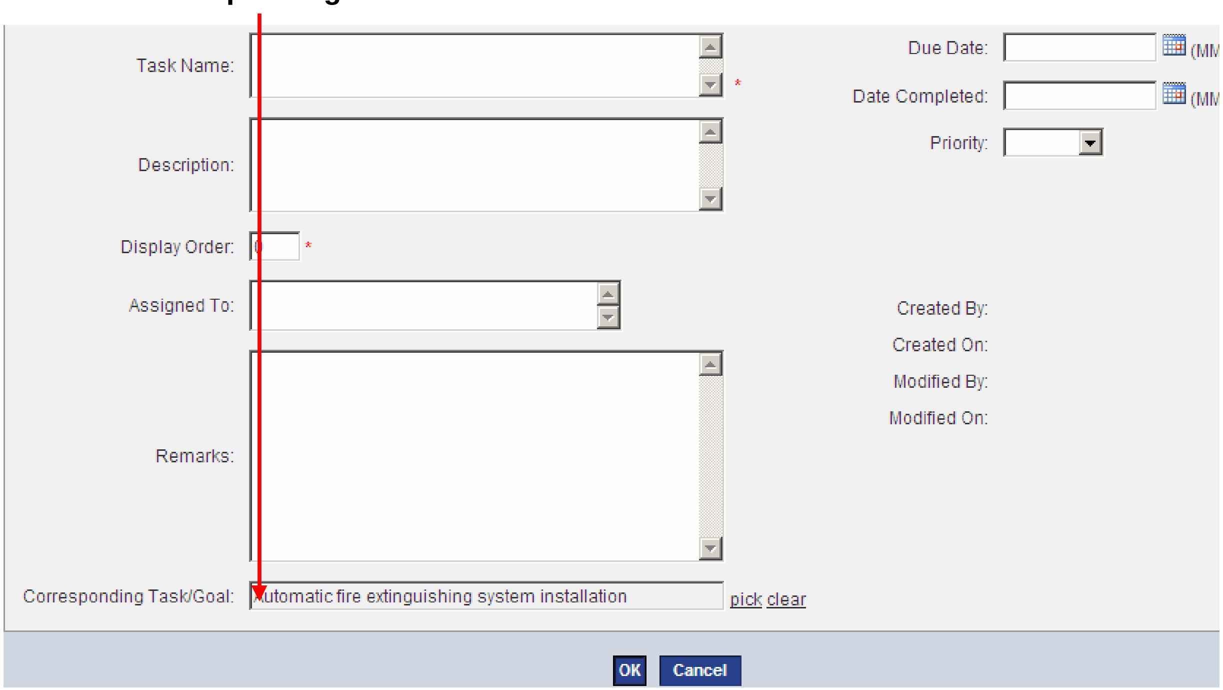
In many instances, the assessment generated tasks may need sub-tasks.

1. To add a sub-task, under the **Type** column, click the yellow plus (+) sign.



The screen will expand to show additional project plan fields.

2. Enter a **Task Name** (Required)
3. Complete any information on the sub-task you want to create.
   Note: The name of the task under which you chose to create this sub-task now appears in the **Corresponding Task/Goal** field.



Project Generated Project Plan

Creating the Project Plan

1. Click the **Project Management** tab at the top of the SafeChurch site.
2. Click the **Options** button under the EFFECT category that you choose to complete a project plan.
3. (Required) Title your Project Plan.

   Enter the name of your church and the title of your project. This is the only required field (marked by a red asterisk (*). Example title: If you completed a Facility Safety (category) Water Damage (Sub-Category) assessment, and you need to take an action as a result, the title for the Plan could be First United Church – Water Damage Repair.
4. (Optional) Select the corresponding category and subcategory.

   You may still find it helpful to select the Category and Sub-Category that corresponds to the project you are creating so that you can group your tasks within common risk/safety categories as you develop your plan.
5. (Optional) Is the project Active?

   Default is **Yes**. If you do **not** want this task to be active yet, select **No**.
   Note that the right of the screen populates with originating information and dates for creation (and modification, when applicable).
6. Click the **Save** button.

View/Edit Tasks and/or Goals and Sub-tasks

Once you have named the project plan, the next step is to view/edit any additional detail associated with the tasks. Unlike an assessment tool generated project plan, none of the tasks will be eliminated as a result of completing an assessment. Rather, every task for the chosen EFFECT category will appear in your project plan.

- If you want to complete a project plan with no EFFECT categories (a blank plan with no tasks inserted), select the **General** category.
- Otherwise, the steps to view/edit tasks and/or goals and add subtasks are the same as the Assessment Tool Generated section of this document.

Project Plan Field Definitions

Before you review or add tasks generated from the risk/safety assessment tool, familiarize yourself with the fields on the Project Plan task list table.

Name	The task name generated by the assessment tool will display here. (Or, if you are completing your own plan, the name you give the task appears here.) For example, "Fire Extinguisher Servicing" could be a task name. The Description field (described below) would then provide more detail. Each task name is a link that opens to a screen where you can edit the project plan task.
Type	The project plan uses tasks and goals. The type field displays if the field is a task or a goal.
Description	This field is a description of the actual task that has been assigned to be completed. For the "Fire Extinguisher Servicing" task, the description could be "Hire a qualified fire extinguisher servicing company to annually service all fire extinguishers.
Due Date	You will enter the date you expect the task to be completed.
Date Completed	You will enter a date in this field once the task has been completed.
Assigned to	This is a memo field where you can enter one or more names of the individuals assigned to complete the task.
Priority	You can assign high, medium, or low priority to a task. Prioritizing tasks is especially important if numerous tasks are generated or when a potentially hazardous condition is identified.
Delete	Only the SafeChurch site administrator for your church will see this field and be able to delete any tasks or goals.
Remarks	This is a memo field where individuals working on this task can enter any remarks pertaining to the status of their work. For example, If John Doe was assigned the task to contact the fire extinguisher servicing company, his entry might look like this: John Doe 04/28/08: Contacted ABC Fire Extinguisher company to request quote.
Corresponding task/goal	Use this field to designate a selected task as a sub-task of another. Click the **pick** link to choose the appropriate goal or task for which this item is to be a subtask.
Display Order	Tasks display in numerical order (starting with 1 at the top). You may choose to display the tasks in a specific order, such as by priority. In that case, you would need to re-number the items to display in the order corresponding to the priority you have entered.