



Town of Bowdoinham

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William S. Post, Town Manager

Nicole - COAC
PB
Comp Plan

Memorandum

To: Staff of all Committees
From: William S. Post, Town Manager *WSP*
Date: October 3, 2016
Re: Guidelines for Projects

In an attempt to assist volunteers on the various committees achieve goals effectively and efficiently, the Select Board developed the attached "Project Guidelines" for use on town projects and initiatives. The Board believes that these guidelines will help staff and the volunteers on committees in several ways, including:

- Avoiding uncontrolled changes or continuous growth in the project's scope (scope creep)
- Provide clear focus on issues
- Provide a clear outline of the issue and approach
- Provide guidelines to promote collaboration while enabling progress

Please keep in mind that some projects may not need to follow all of the steps that are discussed in the Project Guidelines, depending on the complexity of the project.

Please distribute a copy of these guidelines to all the members on the committee(s) to which you provide staff support and discuss these with the chair of each committee so that they can be incorporated in your work and the committee's work.

If you have questions, please let me know.



Town of Bowdoinham Project Guidelines

PREAMBLE

Bowdoinham has a long history of volunteers working with the town to accomplish goals the town could not accomplish by relying on the efforts of town employees alone. As town employees concentrate on performing the essential duties of their jobs, the efforts of these volunteers is essential to continue making Bowdoinham the vibrant community it is. Volunteers generously give the gift of their time, talents, drive and energy. In consideration of their valuable time and to help our volunteers achieve goals effectively and efficiently the project methodology outlined below is recommended by the Bowdoinham Select Board for use on town initiatives.

AUDIENCE

These guidelines are intended to be used by anyone working on initiatives for the Town, including volunteers, members of Advisory Boards and/or town employees.

PURPOSE

This methodology has been developed to help:

- Avoid uncontrolled changes or continuous growth in a project's scope. This can occur when the scope of a project is not properly defined, documented, or controlled. It is generally considered harmful. (also referred to as scope creep).
- Provide clear focus on issues, allowing committees to evaluate the best solution(s) fit using on a fact based approach.
- Provide a clear outline of both issue and approach to enhance communication with town officials and the public.
- Provide guidelines to promote collaboration while still enabling progress to be made.

NOTE: These guidelines are meant to provide guidance and while all steps can be of value, there may be some less complex initiatives where following every step is not necessary to achieve all objectives.

PROJECT GUIDELINES

- I. GOAL DEFINITION - Clearly define the goal to be achieved or the issue to be solved. Be careful not to start with a solution; if the definition highlights 'how' to accomplish the end result the project may not be open to other approaches that become apparent later in the process.

A clear definition outlines the outcome to be achieved, including who will benefit from the initiative. This step often takes longer than anticipated, but a clear definition is key to success and can shorten the overall process.

- II. CRITICAL FACTORS - Within each project there are things that absolutely must happen for success, or conversely, if it goes wrong would jeopardize success. For example, success may depend on citizen vote at the Annual Town Meeting or success could depend on underlying State statutes. During this phase of the project staying focused on the definition, thinking about factors that will remain critical for the life of the project and consider input from others; for example experts or other towns that have undertaken projects similar to yours.
- III. ENVIRONMENTAL FACTORS - No project is completed in a vacuum; there will be factors, both internal and external to the town, which will impact or influence the project. For example it may require funding approval, need to comply with State statutes, or require volunteers to achieve success. Identifying factors within the environment is key to helping identify the how they impact the project and how to address them to ensure success.

This step can be addressed as a 'brainstorming session'; be sure to tie the ideas raised into the Critical Factors by asking the question "Which means?". For example if the project must have volunteers to deliver services the scan could include information on availability of volunteers. Don't worry about editing during the brainstorming session; however after the session whittle down the environmental factors identified to the most critical.

To the extent possible all factors identified should be based on facts and/or data. Data sources may include research, or information from other towns. Avoid anecdotal information wherever possible; while anecdotes can be powerful they can also be misleading. If there is not a good source for facts, consider conducting a survey. While survey results may be skewed they will be more reliable than anecdotes alone.

- IV. IDENTIFY GAPS AND DEVELOP ACTION STEPS - At this point the goal, factors critical for success, and current environment have been defined making the next step to identify gaps between current environment and goal. Now is time to brainstorm the best way, the 'how', to achieve the goal. There may be multiple ways to accomplish the goal, be sure to explore all options to ensure the project utilized the best approach.

Within each action step try to establish objective measures that can be used to measure and monitor the initiative's long term success.

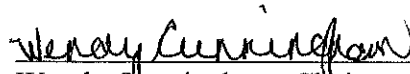
GOOD MEETING GUIDELINES

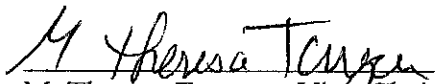
Meetings are inevitable and can be the best and most productive way to gather input from the entire team. Unfortunately sometimes meetings can be tedious and get off track. Outlined below are suggested guidelines to help your group hold effective meetings.

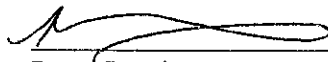
1. All members are expected to come to meetings prepared; completing whatever pre-work is required, whether it is reading material/minutes from prior meeting and/or being prepared to report on your (or your sub-group's) activities agreed to during last meeting (see step 6).

2. Be clear on meeting purposes - goals, roles and decision process. The Chair should set the agenda, including date and time, and distribute it to group members at least one day prior to the meeting.
3. During the meeting be fully focused and ready to contribute - remain on topic and be concise, practice candor, be respectful (address issues, not individuals).
4. Have an inquiring mindset - test assumptions, seek clarification, share understanding and acknowledge common ground.
5. Respect the clock - allow time for every voice, help maintain agenda, limit side conversations, avoid cell phone interruptions, note unrelated issues for future meetings.
6. Be clear on next steps - what, who and when.


First endorsed by the Town of Bowdoinham Select Board on September 13, 2016.


Wendy Cunningham, Chair


M. Theresa Turgeon, Vice Chair


Peter Lewis


Douglas Tourtelotte


Thomas Walling