



WORKSHOP OUTLINE

Project Management for NPOs 101

A single interactive session for teams who run initiatives without calling them projects

ONE SESSION

90 MINUTES

VIRTUAL

NO NEW SOFTWARE

SESSION OVERVIEW

Approved Is Not the Same as Started.

“Everyone contributed. No one was accountable. The project drifted for eight months and nobody could say exactly when it stopped moving.”

Nonprofit teams run projects constantly and almost never call them that. A new program launches, a site opens, a system gets replaced, a grant requires something delivered by a date. The work is real and the stakes are real, but it is managed in meetings and inbox threads, and the discipline that would carry it to a finish is missing.

This session supplies that discipline in 90 minutes, scaled for small teams and requiring no new software. Participants break down a real initiative of their own, assign single ownership, map what actually drives the schedule, and leave with a one-page charter and a check-in cadence their team has agreed to.

Who it is for

- Program managers running funded initiatives
- Operations and administrative staff who hold projects together
- Executive directors with more initiatives than capacity
- Anyone handed a launch, a move, or a system change

What makes it interactive

- Live work breakdown of an initiative the team brings
- Ownership sort: deliverables assigned to a person, not a department
- Dependency mapping that exposes the real critical path
- A one-page project charter drafted in the room
- A check-in agenda the team commits to before leaving

THE THREE QUESTIONS

What does it look like? · Who owns it? · What happens by next Thursday?

SINGLE SESSION · FOUNDATION

01

Scope, Ownership, and a Finish Line

The discipline that turns an approved idea into finished work

90

minutes

Learning Objectives

By the end of this session, participants will be able to:

- 01 Write a scope statement that says what is included and what is not
- 02 Break an initiative into work small enough to assign and estimate
- 03 Name a single accountable owner for every deliverable
- 04 Map dependencies and identify what genuinely drives the schedule
- 05 Run a check-in that surfaces problems before they become late
- 06 Keep a risk and decision log a funder would find credible

What We Cover

- Defining done: scope statements, stated exclusions, and acceptance criteria
- The work breakdown structure, and how small a piece of work needs to be
- Single ownership, and why a committee cannot be accountable for a deliverable
- Dependencies and sequence, and where nonprofit projects most often stall
- Milestones that mean something to a funder as well as to the team
- Risk, issue, and decision logs kept simply enough that people maintain them

How Participants Engage

- Opening round: name a project that stalled, and where it stopped
- Live work breakdown of a real initiative brought by the team
- Ownership sort: every deliverable assigned to one named person
- Dependency mapping exercise revealing the true critical path
- Drafting a one-page project charter for that initiative
- Agreeing the check-in agenda and who runs it

KEY TAKEAWAY A project without a named owner and a defined finish line is a wish with a budget attached.

One page, written before the work starts

Most nonprofit projects have no project document at all. The ones that do usually have a twelve page plan written to satisfy a funder, filed once, and never opened again. Neither helps the person who has to decide on a Tuesday whether something is on track.

The charter is one page, written in the room, and short enough that the team will keep it current. It answers the questions that matter mid-project, and it is what you reopen when someone proposes adding something.

How it gets built

01 Write the finish line first

What is delivered, what is explicitly not, and how anyone will know it is done. Exclusions are what make a later change a decision rather than an argument.

02 Break the work down

Into pieces small enough that one person can own one and estimate it honestly. If a task cannot be estimated, it is still too big.

03 Assign one owner to each piece

A name, not a department and not a committee. Owners can delegate the work; they cannot delegate the answer to how it is going.

04 Set the cadence and the log

A standing check-in with a fixed agenda, and one place where risks, issues, and decisions are written down as they happen.

The five fields, and why each one is there

DONE MEANS	The deliverable stated in terms someone outside the team could verify.	Stops scope drifting quietly.
NOT INCLUDED	What this project is explicitly not doing, written down at the start.	Makes change control possible.
OWNER	One named person accountable for each deliverable, with a named backup.	Ends shared responsibility.
DEPENDS ON	The inputs this work cannot start without, and who provides each.	Finds the real critical path.
CHECK-IN	When the team meets, what it reviews, and who escalates what.	Catches late before it is late.

THE RESOURCE YOU RECEIVE

Work Breakdown Structure Template

- A worked example to start from
- The one-page charter, in editable form
- Deliverable, owner and dependency columns
- A check-in agenda ready to adopt

Supplied as a printable PDF and an editable Word document.

HOW THE SESSION RUNS

Ninety minutes, on your own project

Instruction is kept short and applied immediately to an initiative the team brings with them. Every segment ends with part of a real charter written.

OPENING

10 min

Name a project that stalled

Each participant names an initiative that lost momentum and the point at which it did. The pattern in the answers sets up everything that follows.

PART ONE

20 min

Defining done

Scope statements, stated exclusions, and acceptance criteria. The group writes the finish line for the initiative it brought, then tests whether an outsider could verify it.

PART TWO

20 min

Breaking the work down

How small a piece of work needs to be before it can be owned and estimated. The team builds a work breakdown structure for its own project, live.

PART THREE

15 min

Ownership and dependencies

Every deliverable gets one name. Dependencies are mapped, and the exercise usually reveals that the schedule is driven by something nobody was tracking.

PART FOUR

15 min

Risk, cadence, and the check-in that holds

A risk and decision log simple enough to maintain, and a standing agenda that surfaces trouble while there is still time to act on it.

CLOSING

10 min

Your one-page charter

The pieces are assembled into a charter the team takes with them, and the first check-in is scheduled before anyone leaves the session.

What participants take away

A completed one-page project charter for a real initiative, a work breakdown structure with named owners, a dependency map, a risk and decision log, and a scheduled first check-in. Templates are provided in editable form so the team can reuse them on the next project without returning to us.