Using MS Excel to Develop Easy-to-Use GANTT Charts and Implementation Tracking tools

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Evaluation Research Strategies

GANTT Chart basics

GANTT charts are longitudinal by design, and are intended to provide a visual representation of what tasks or outcomes should be completed by a given project time point.

Pros

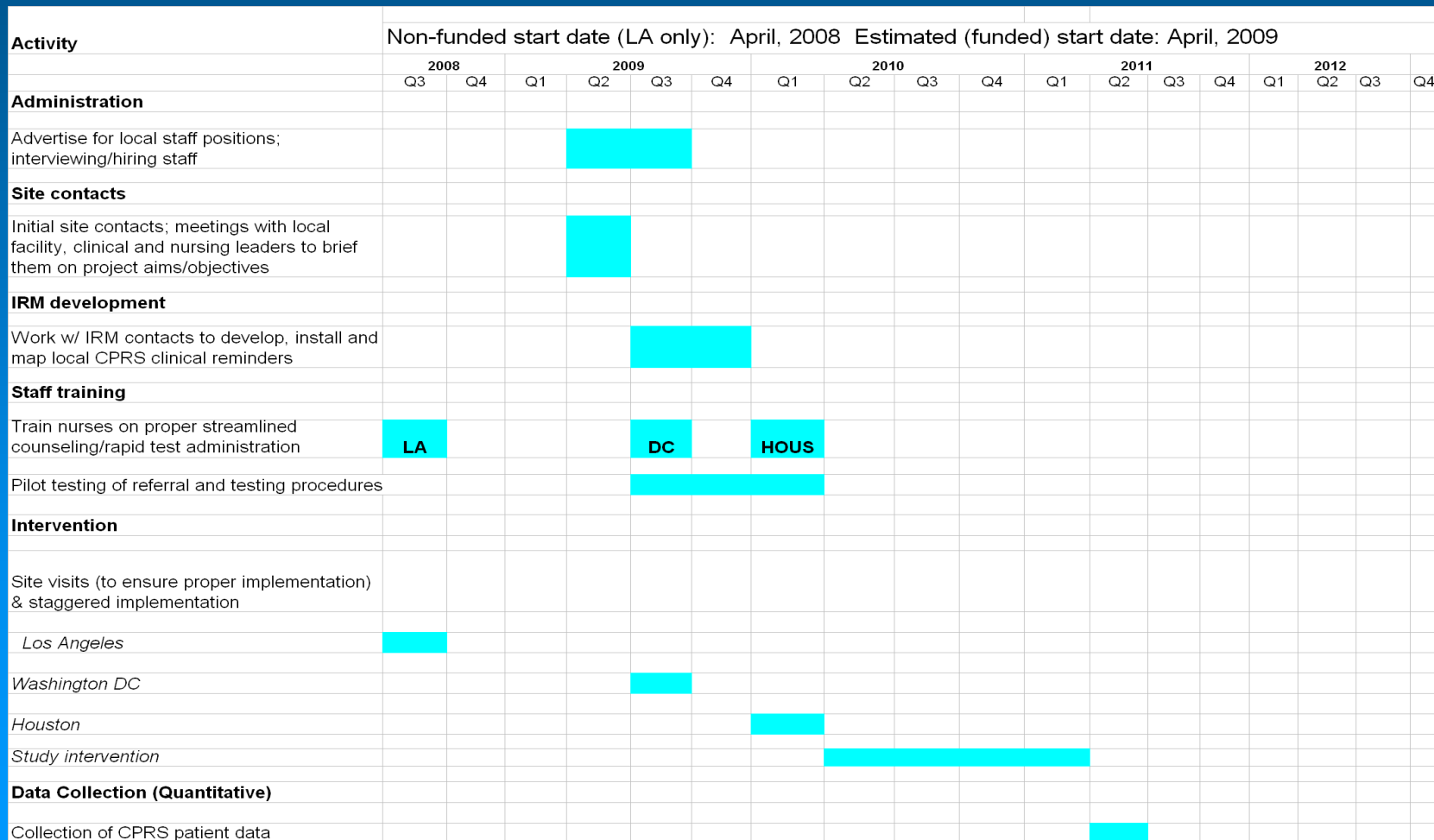A common and widely understood technique for conveying essential work/time projections.

Good with small/medium number of task projections.

Cons

become unwieldy after a significant number (≈30) task entries.

Fail to convey the differences or the Relative importance between tasks.

GANTT Chart basics (cont'd)

| Activity	Non-funded start date (LA only): April, 2008 Estimated (funded) start date: April, 2009																	
	2008		**2009**				**2010**				**2011**				**2012**			
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Administration																		
Advertise for local staff positions; interviewing/hiring staff				■	■													
Site contacts																		
Initial site contacts; meetings with local facility, clinical and nursing leaders to brief them on project aims/objectives				■														
IRM development																		
Work w/ IRM contacts to develop, install and map local CPRS clinical reminders					■	■												
Staff training																		
Train nurses on proper streamlined counseling/rapid test administration	LA				DC		HOUS											
Pilot testing of referral and testing procedures					■	■												
Intervention																		
Site visits (to ensure proper implementation) & staggered implementation																		
Los Angeles	■																	
Washington DC					■													
Houston							■											
Study intervention								■	■	■	■							
Data Collection (Quantitative)																		
Collection of CPRS patient data												■						

Creating a simple GANTT chart

In Excel, simply select a column and row to begin, and type in your main heading (in this case, 'activities' and follow that with the activities you will be engaging in for your evaluation plan)
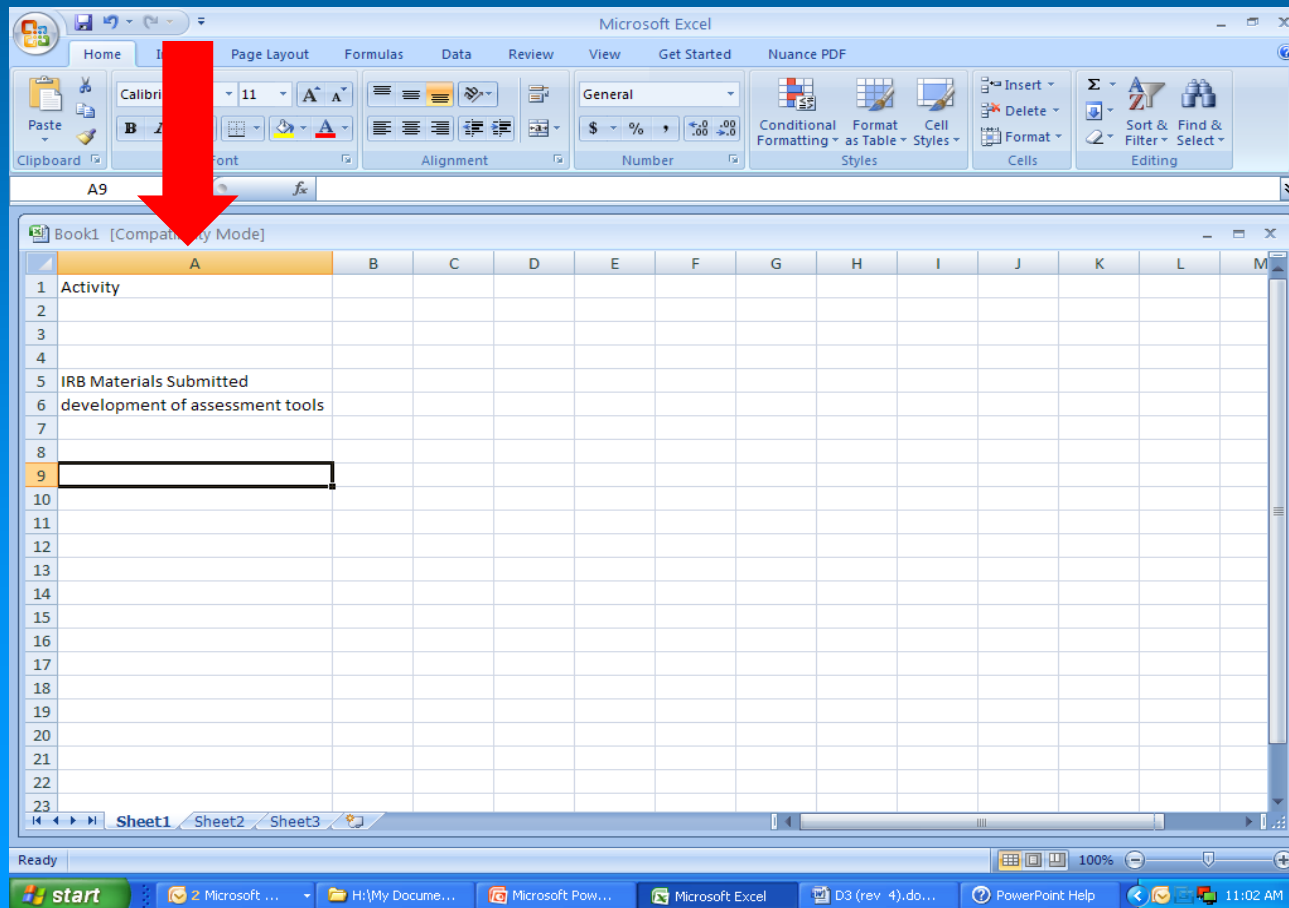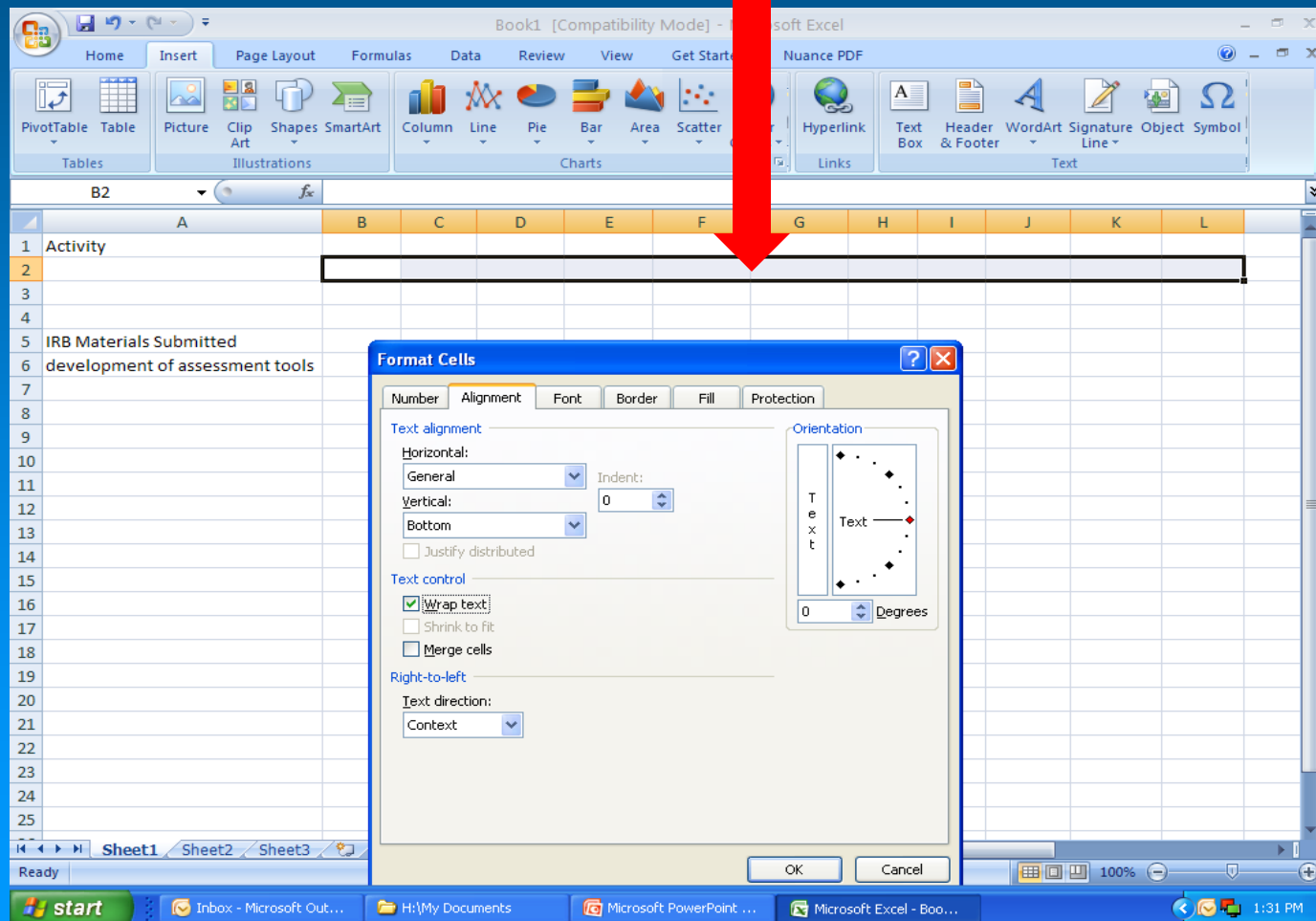
Creating a GANTT Chart (cont'd)

You can then add your monthly column designations
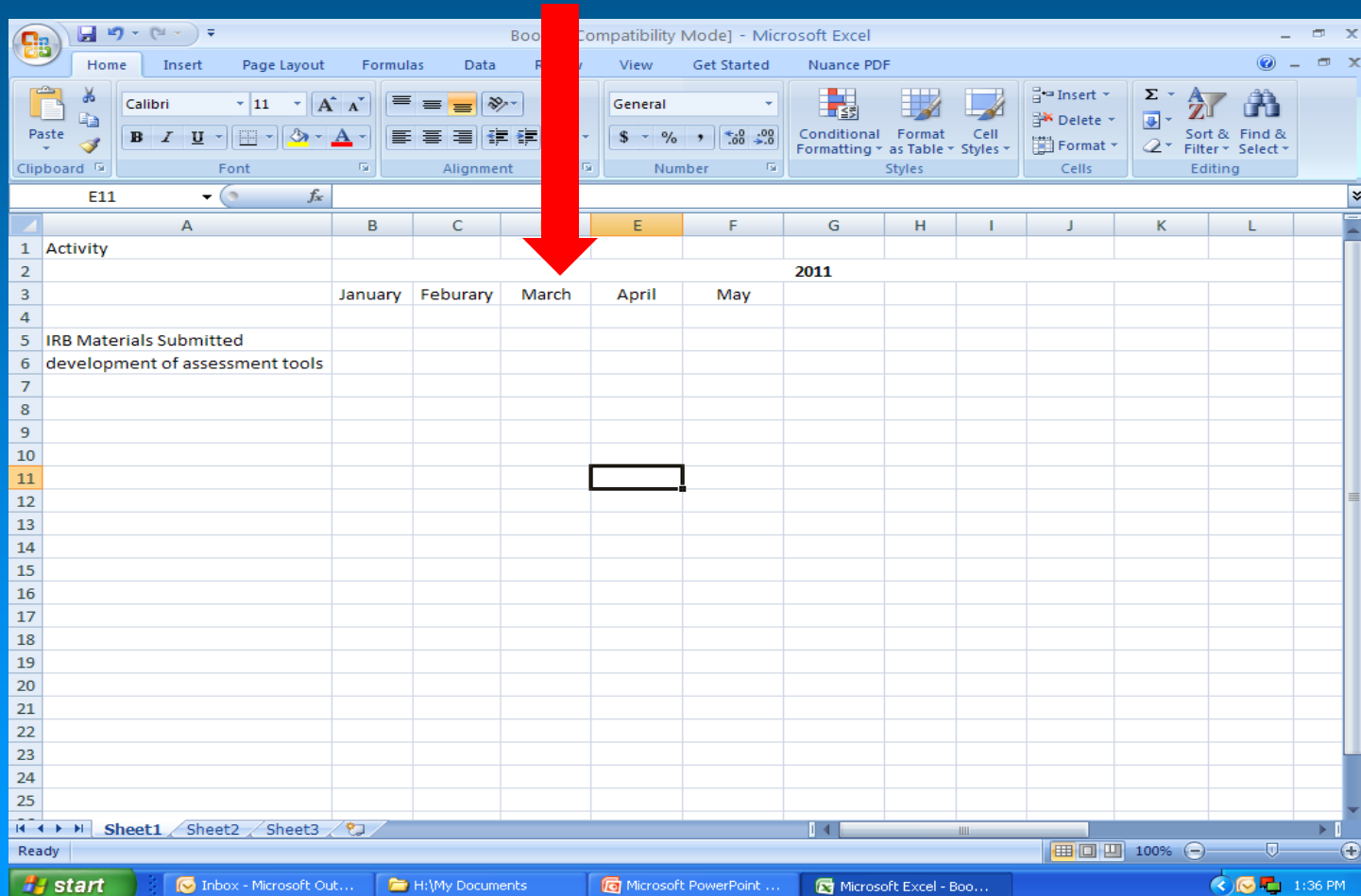
Creating a GANTT Chart (cont'd)

Using your mouse, you then right-click a group of cells and select the 'alignment' tab and then the 'merge cells' box to merge the rows into one

Creating a GANTT Chart (cont'd)

By again right clicking your mouse, on the cells of your choice, you can select the 'format cells' tab, and then further select the 'fill' tab and select the color of your choice to highlight in your GANTT chart when you estimate a specific activity will be completed by
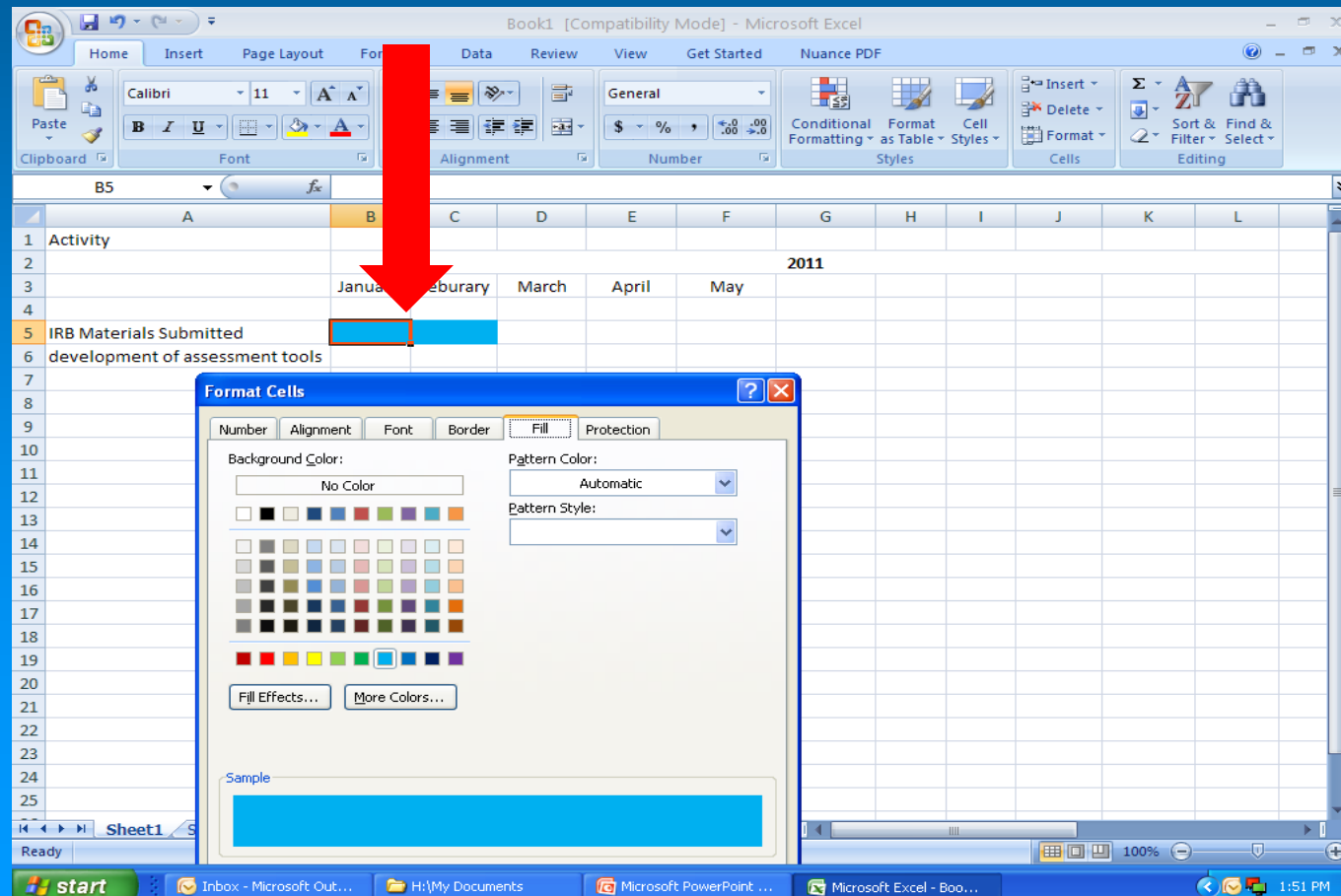
Creating a GANTT Chart (cont'd)

Once you are satisfied with your GANTT chart, be sure to first save your work. To transfer it over to your working document, take your mouse, right click and drag the area of the chart you want, and select 'copy'
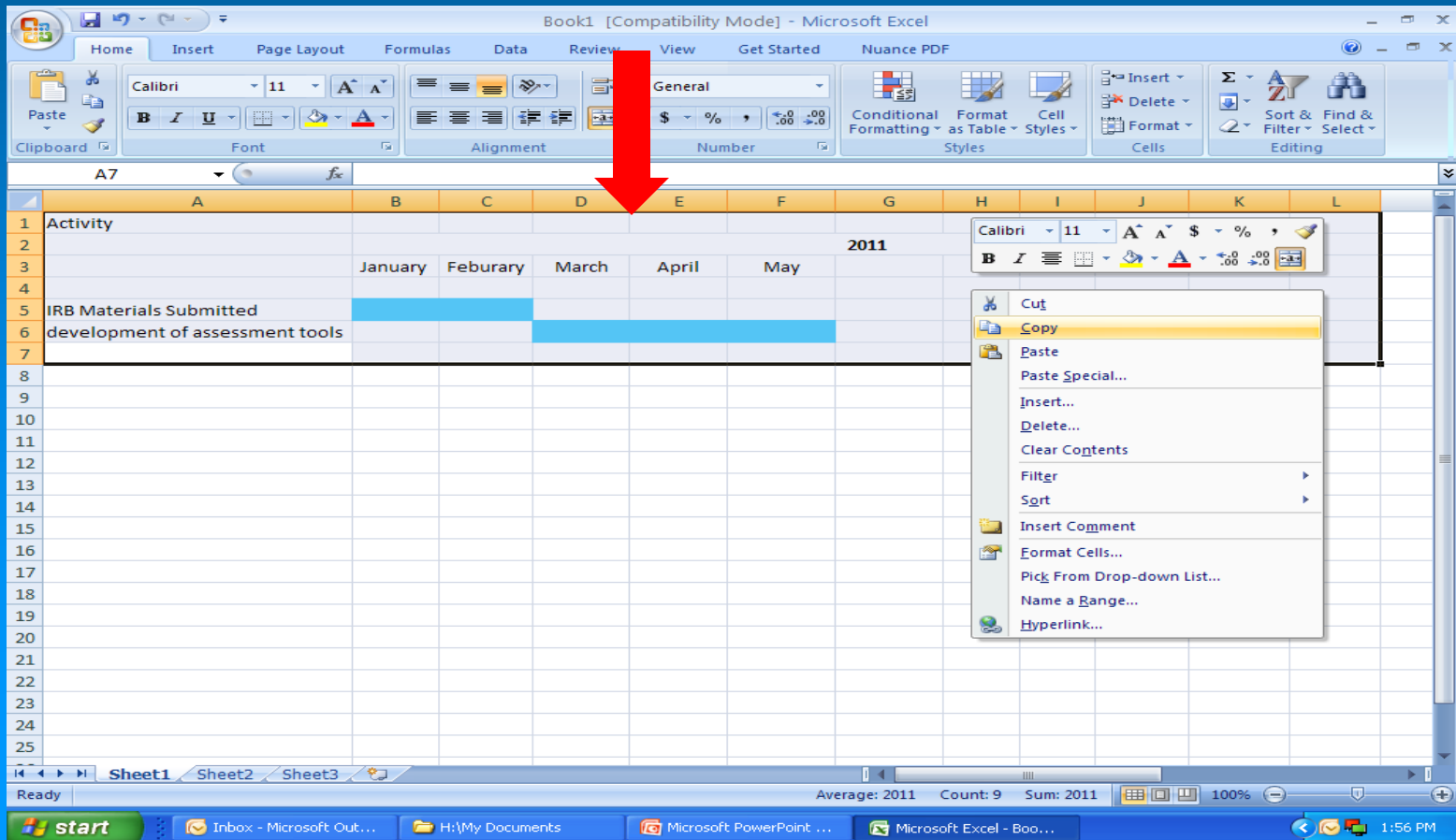
Creating a GANTT Chart (cont'd)

In your MS word document, select 'paste special'
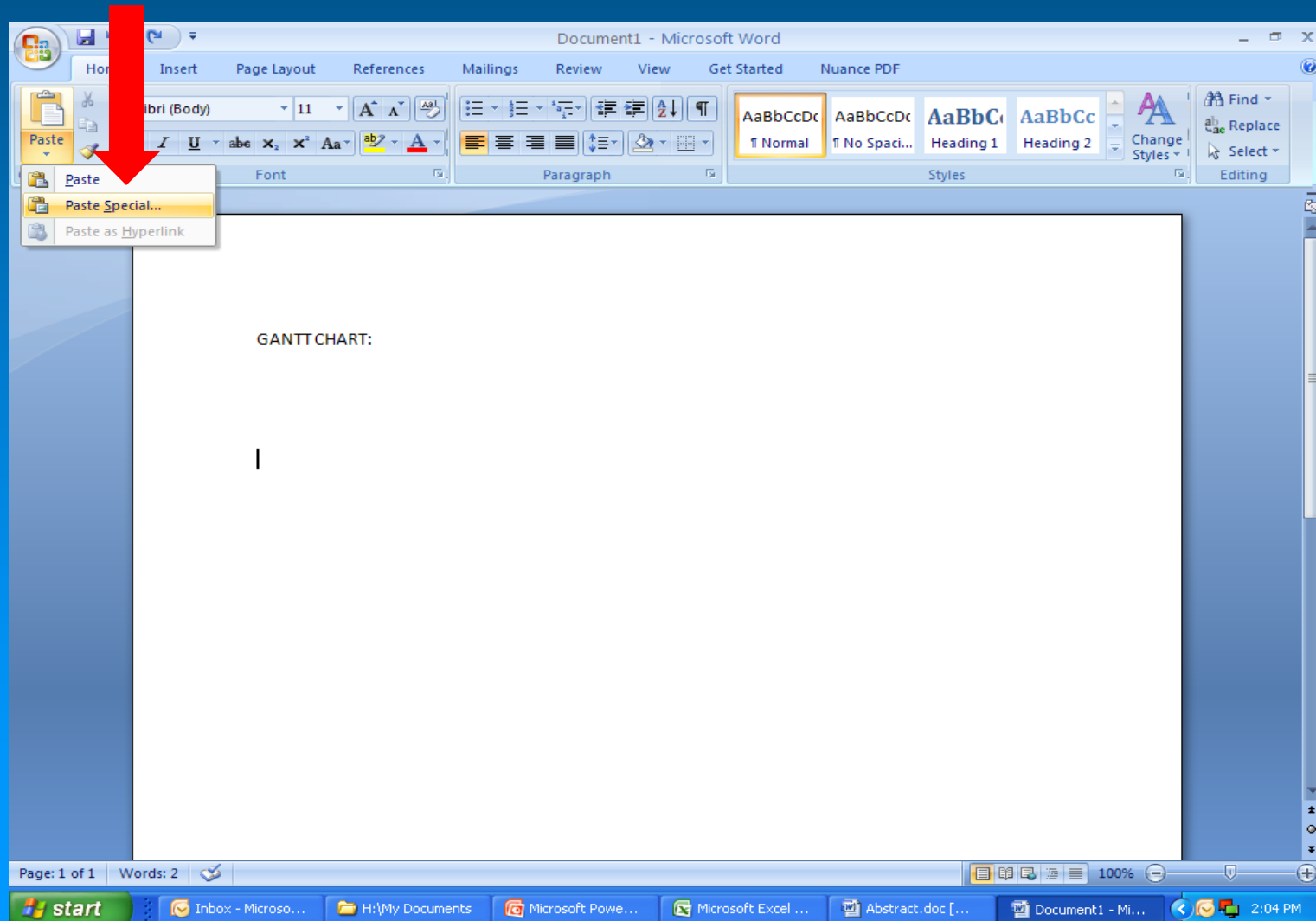
Creating a GANTT Chart (cont'd)

Finally, select 'picture' to paste into your document, and you're done!
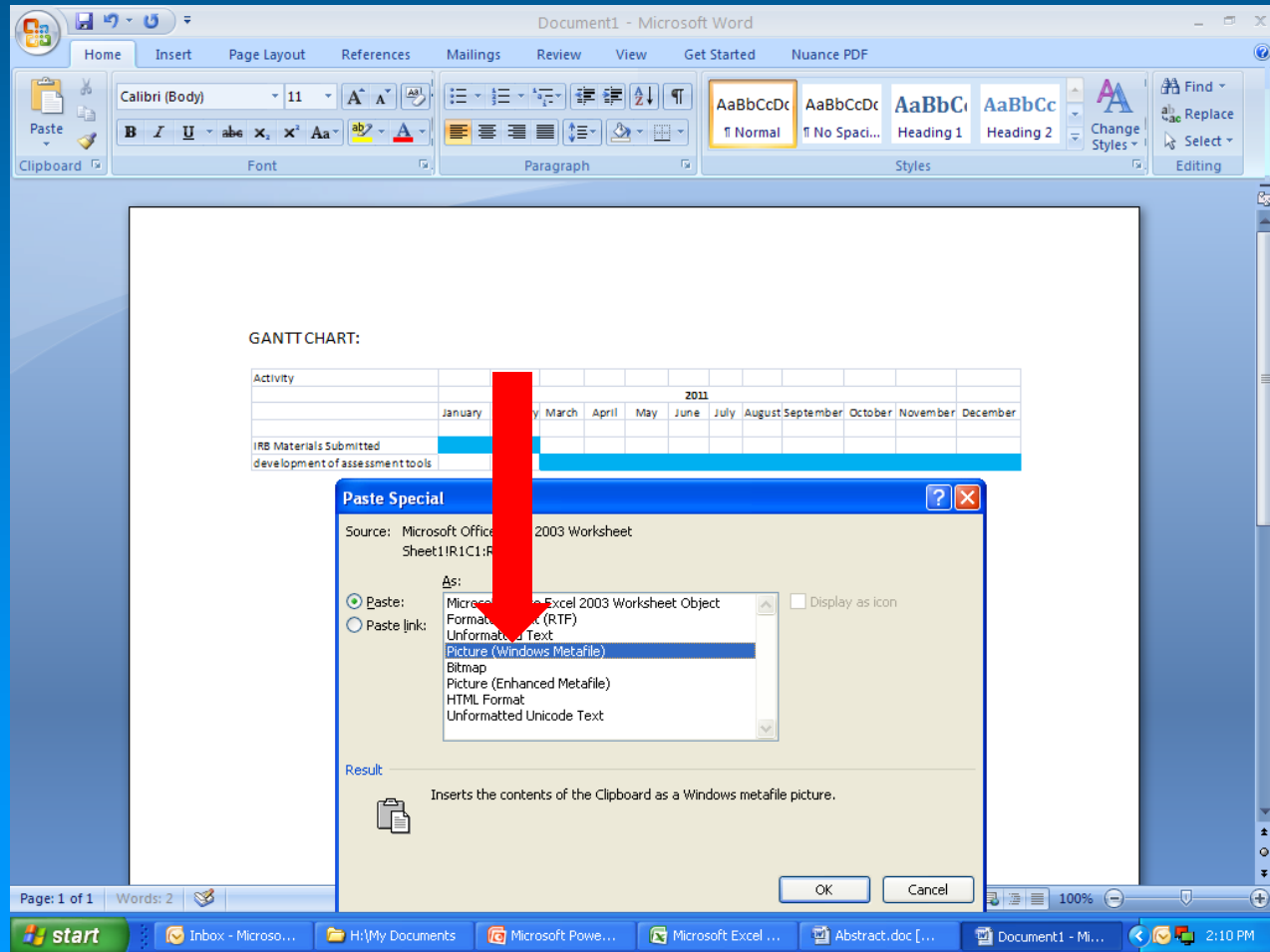
A helpful tip for GANTT charts

When selecting the best time projection to measure your progress (i.e., weekly, monthly, quarterly), a good rule of thumb is the longer your project, the longer your time measurement.

- 0 to 6 months, <u>weekly</u> projections are best.
- 6 months to 1 year, <u>monthly</u> projections will work best.
- >1 year, you should consider <u>quarterly</u> projections.

An multifaceted tool to track progress and report staff feedback:

The *Implementation Tracker*

Creating an Implementation Tracker (cont'd)

I chose what I thought were <u>essential</u> to a successful intervention:

- Distribution of CDC screening guidelines
- Distribution of handbook on counseling to clinic nurses
- Distribution of CDC training materials on rapid testing
- Distribution of nurse-initiated screening procedures to clinic managers
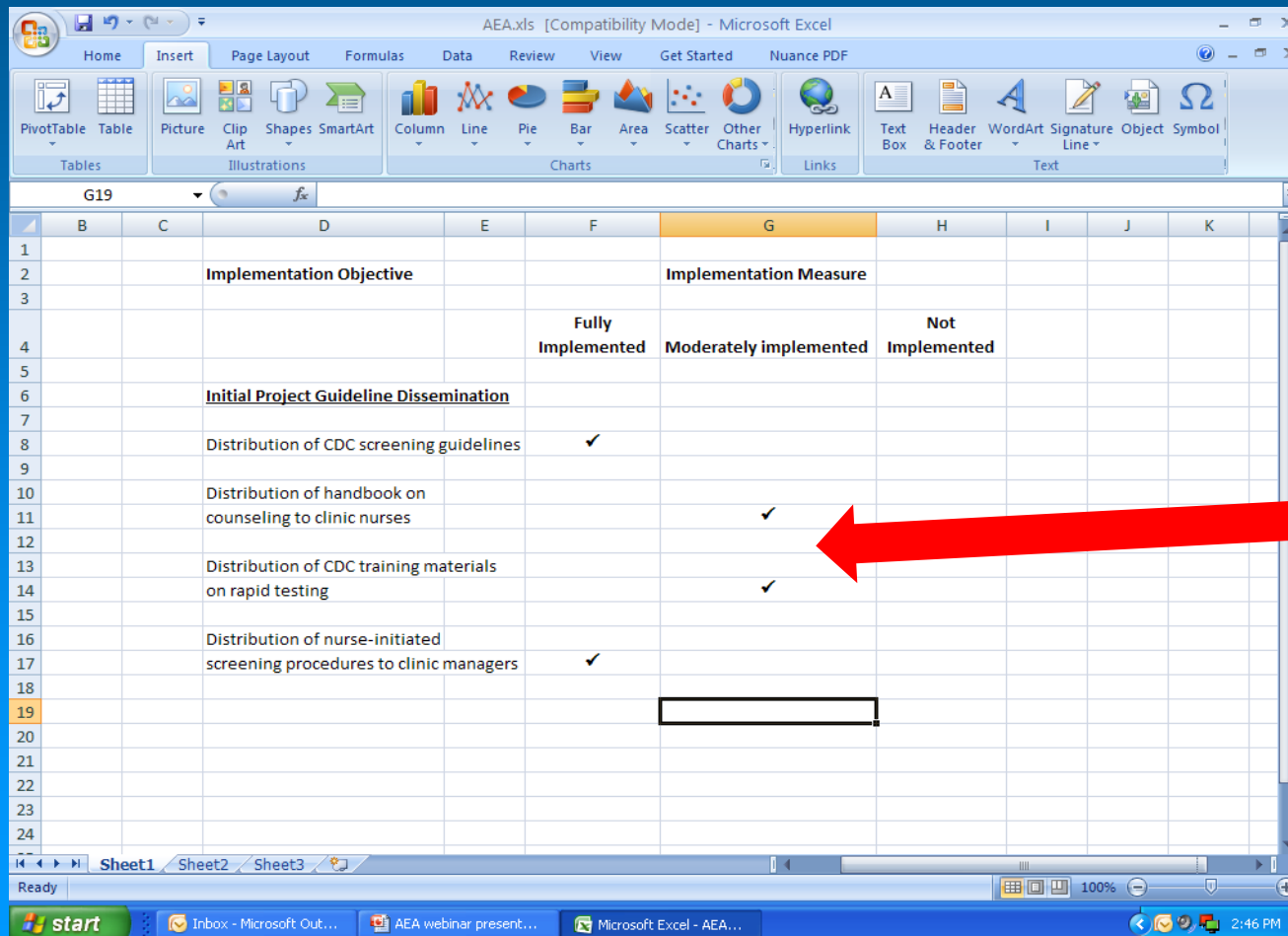
Creating an Implementation Tracker (cont'd)

The next step is to create a measure as to how successfully these individual steps were implemented. To accomplish this, I chose a three-tiered measurement.

A specific step was therefore, either:

- Fully implemented
- Moderately implemented
- not implemented at all

Creating an Implementation Tracker (cont'd)

Implementation Objective

implementation measure

	Fully implemented	Moderately implemented	Not implemented

Initial Project Guideline Dissemination

Distribution of CDC screening guidelines;

Distribution of handbook on streamlined counseling to clinic nurses

Distribution of CDC training materials on rapid testing

Distribution of nurse-initiated screening procedures to clinic managers

Creating an Implementation Tracker (cont'd)

The next step is to create a simple checklist system to gauge this.

I chose MS Excel.   Here's how it looks. It's that simple.
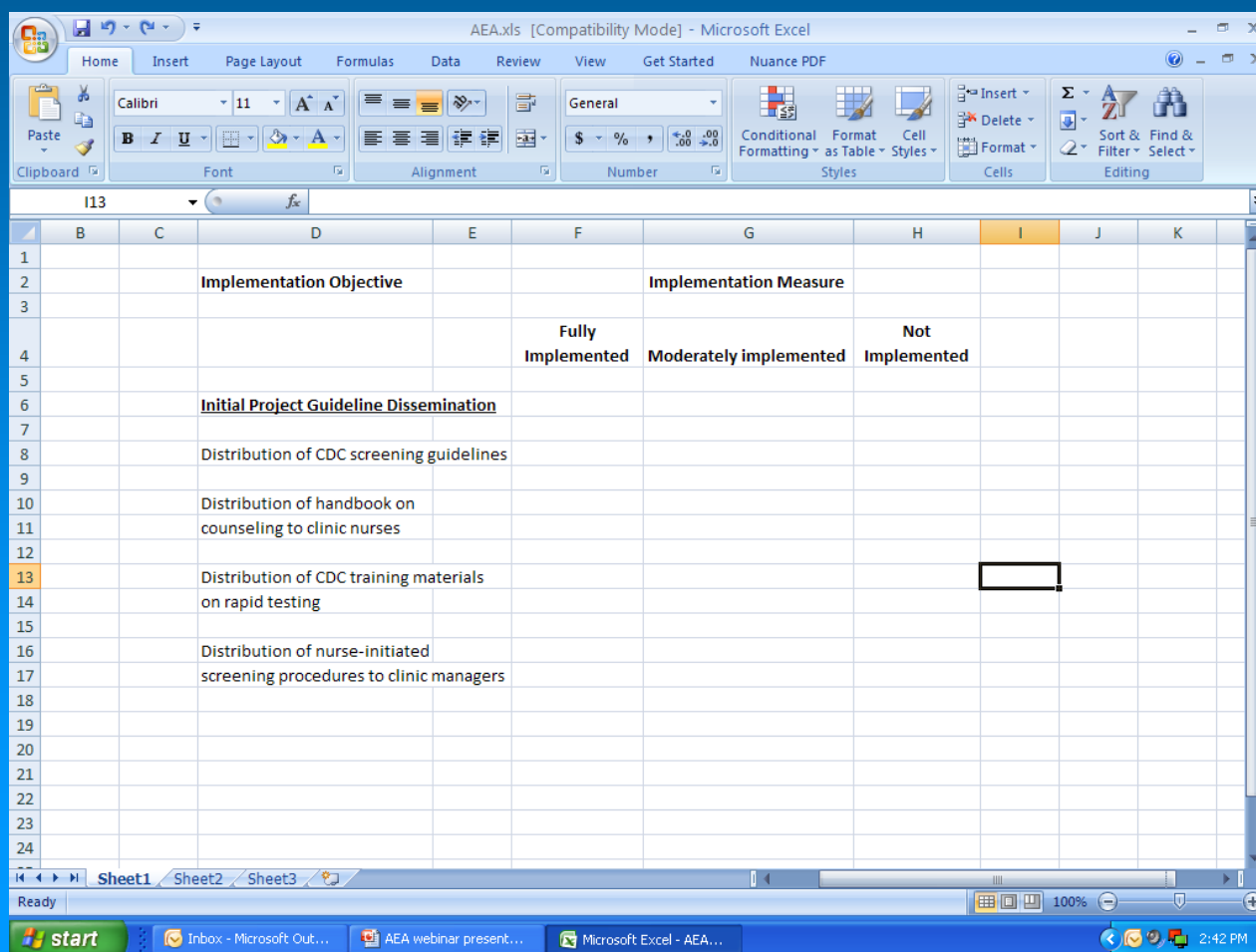
Creating an Implementation Tracker (cont'd)

You add your checkmarks depending on your assessment as to how your implementation proceeded.

Creating an Implementation Tracker (cont'd)

Not only is this a good tool for you to internally gauge how your effort is proceeding, but it is also a good 'audit-feedback loop' for external staff to see how they are doing.

With this type of tracker tool, you are *feeding back* to staff how well they are (or are not) doing.

The *Implementation Tracker* as a Simple 'Audit-Feedback' System

You periodically *feed back* information to your study team, so that

- you determine whether or not something is being implemented as intended;
- whether the policy changes you requested happened in a timely manner, etc.
- they can review the progress to date, and make adjustments
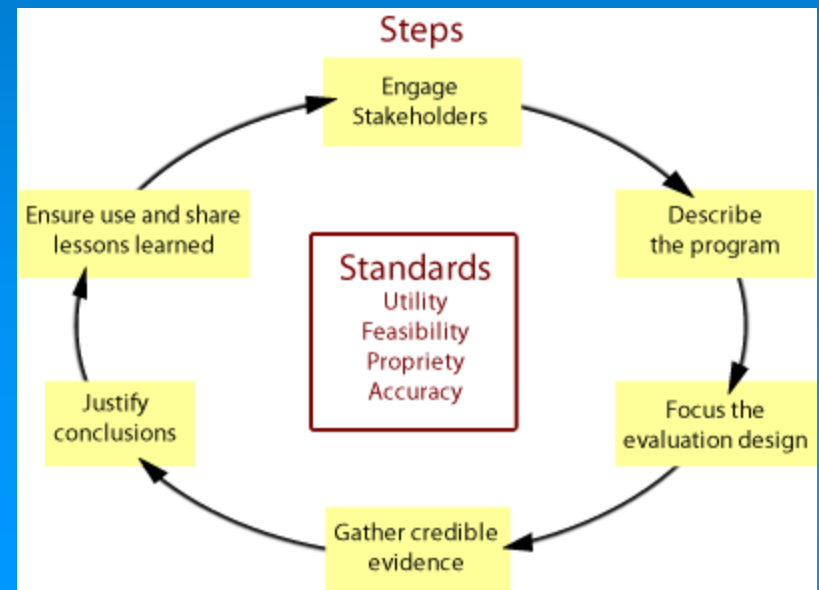
Thank you

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