

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

Henry D. Anaya, PhD
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.

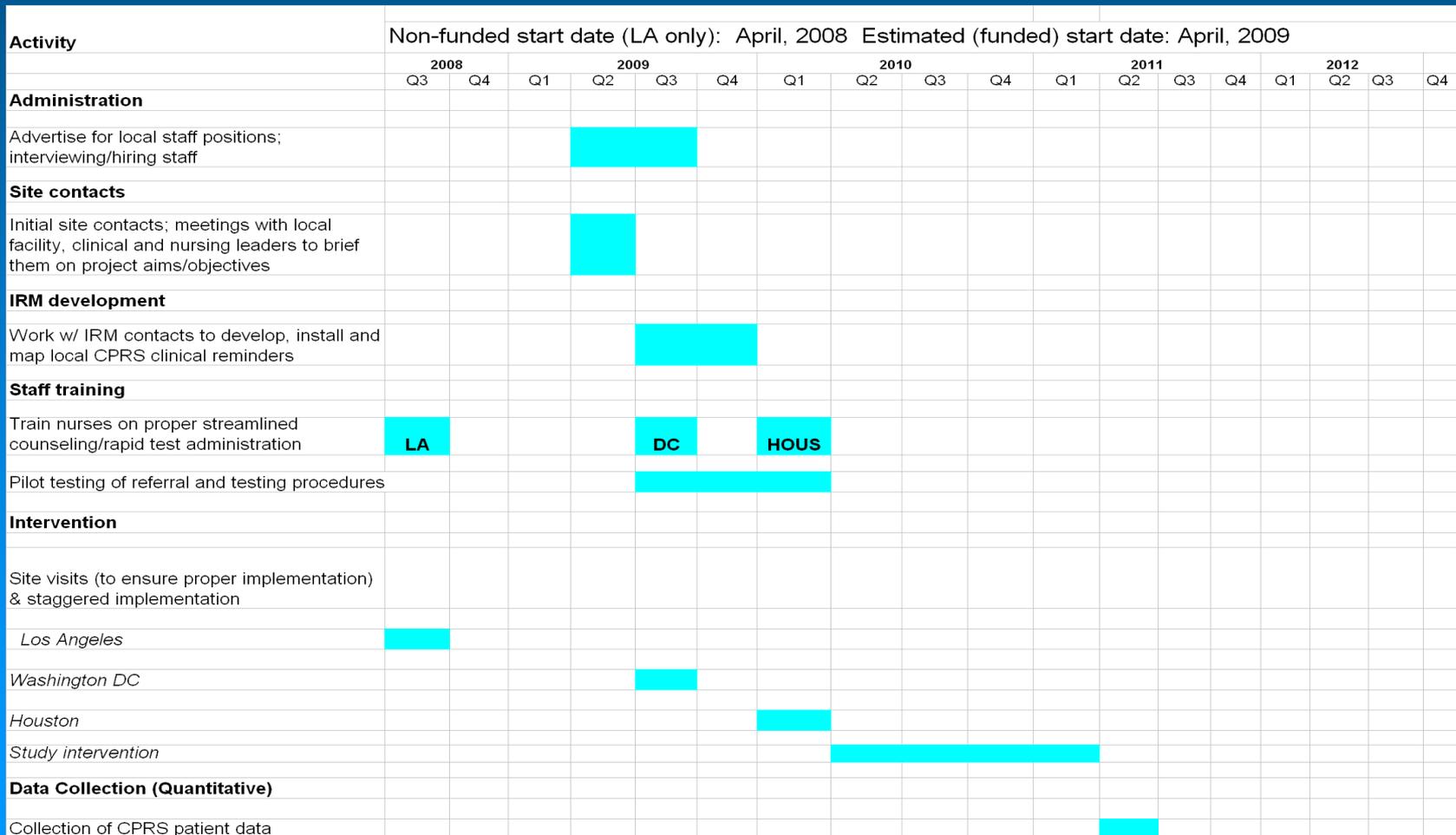
Good with small/medium number of task projections.

Cons

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

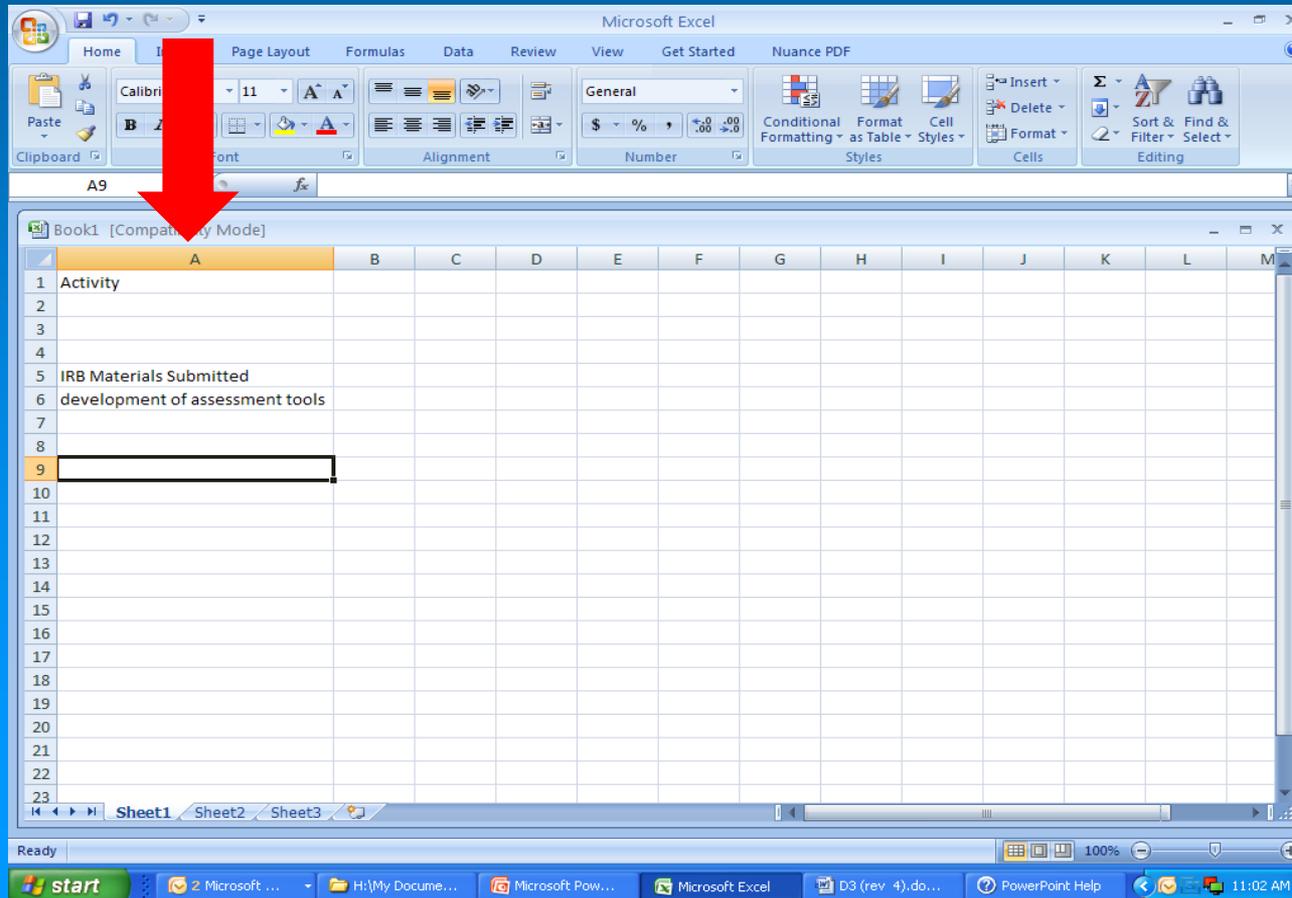
Fail to convey the differences or the Relative importance between tasks.

GANTT Chart basics (cont'd)



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

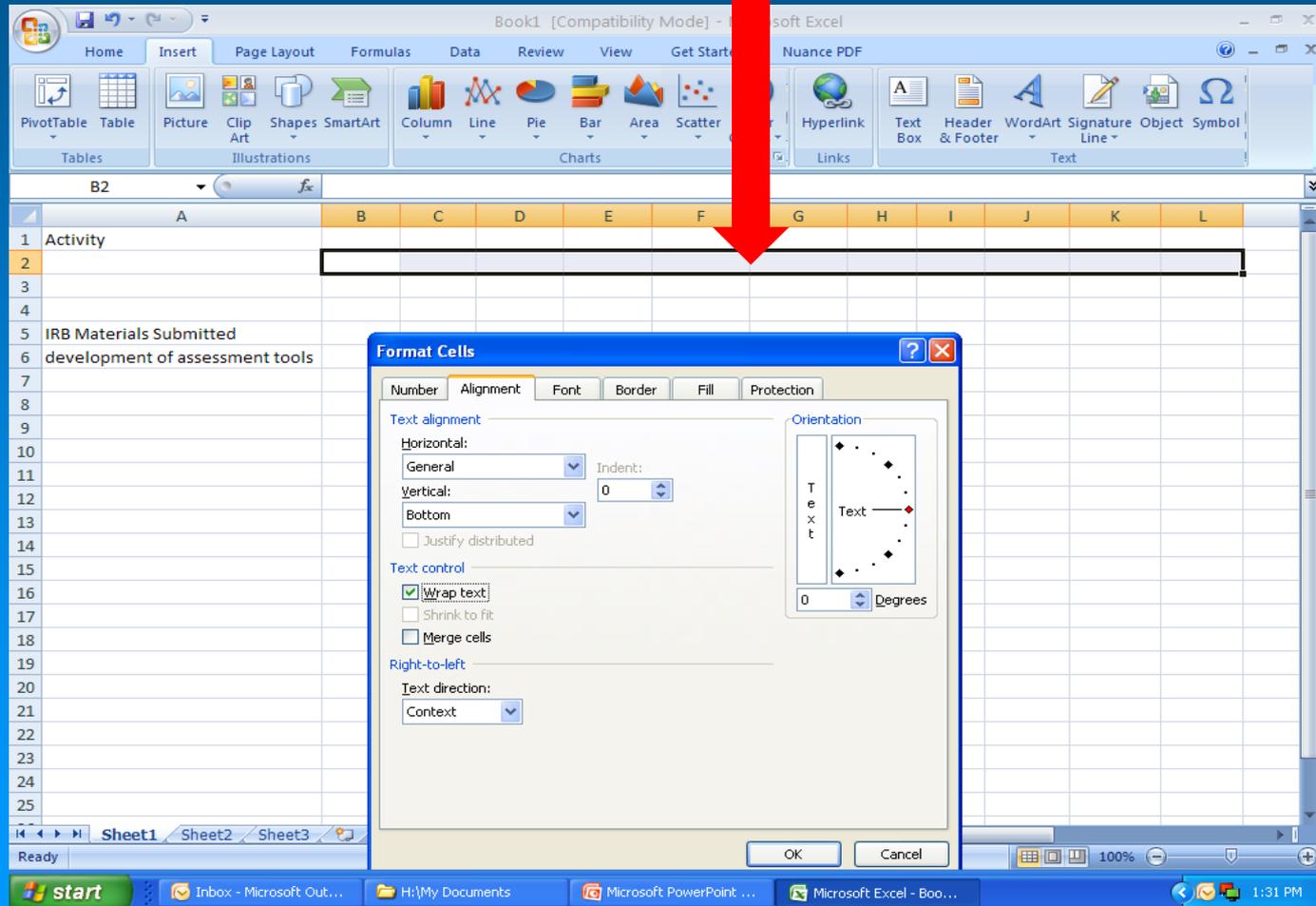
The screenshot shows a Microsoft Excel spreadsheet with the following structure:

Activity	January	February	March	April	May
IRB Materials Submitted					
development of assessment tools					

A red arrow points to the 'March' column header, and a black box highlights a cell in the 'April' column. The spreadsheet is titled 'Boo... [Compatibility Mode] - Microsoft Excel' and shows the 'Home' ribbon with various formatting options. The taskbar at the bottom shows the Start button and several open applications, including Microsoft Excel.

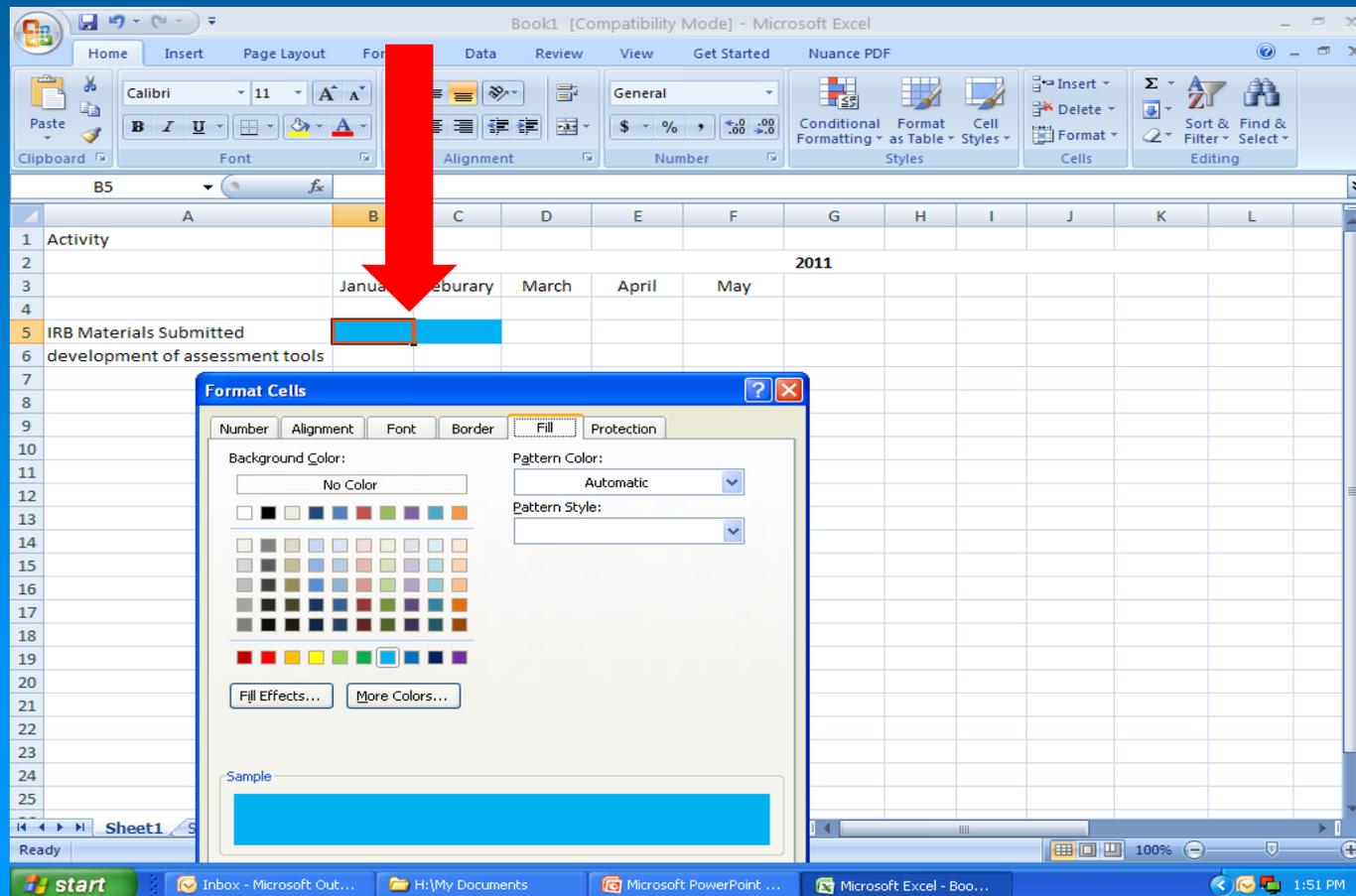
Creating a GANTT Chart (cont'd)

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)

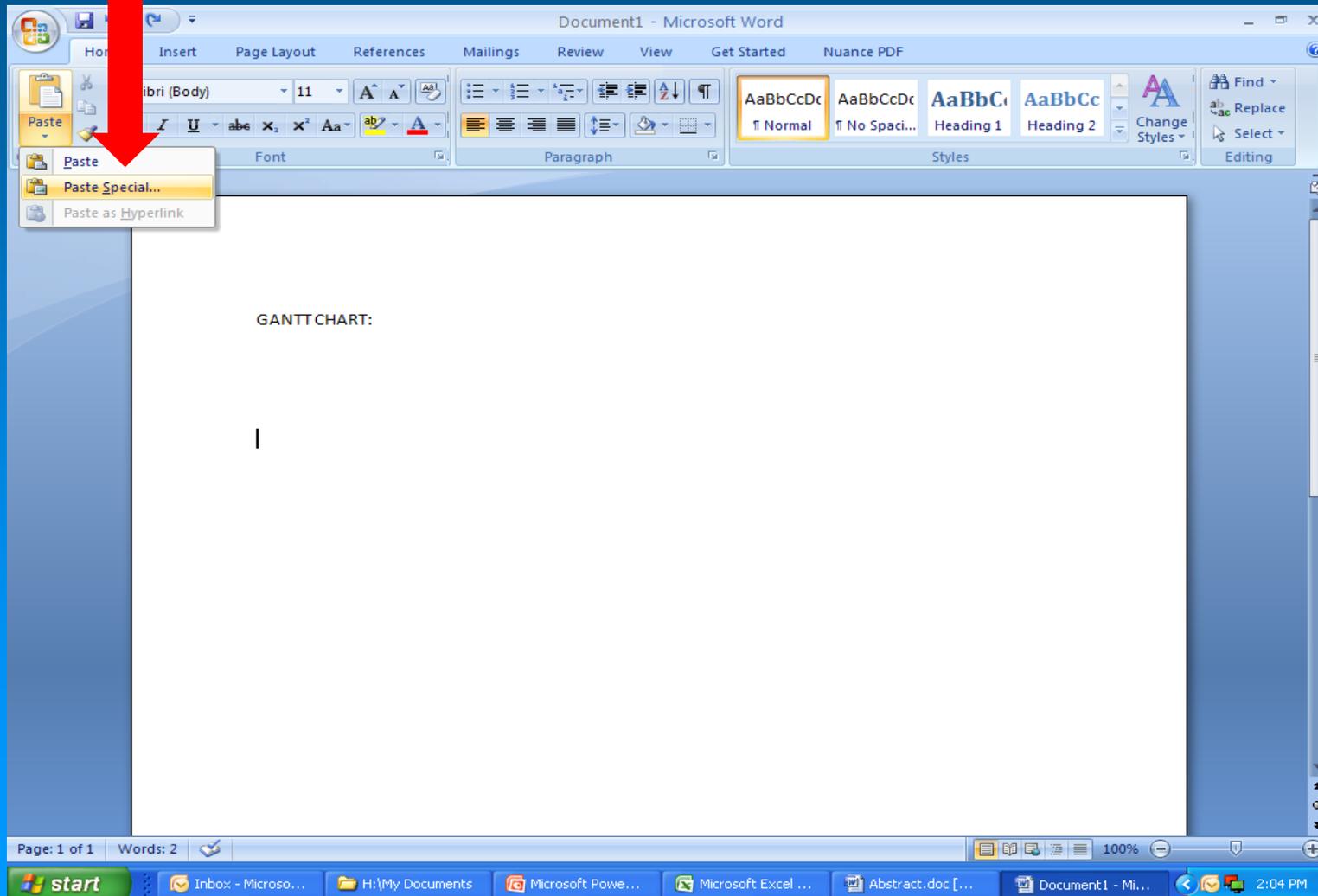
Once you are satisfied with your GANTT chart, be sure to first save your work. To transfer it over to your working document, take your mouse, right click and drag the area of the chart you want, and select 'copy'

The screenshot shows Microsoft Excel with a Gantt chart. The chart is located in the range B5:F6. The activity is 'IRB Materials Submitted development of assessment tools'. The chart shows a blue bar starting in January and ending in May. A red arrow points to cell D4. A context menu is open over the chart area, with 'Copy' selected.

Activity	January	February	March	April	May
IRB Materials Submitted development of assessment tools	Start				End

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!

The screenshot shows a Microsoft Word document titled "Document1 - Microsoft Word". The ribbon is set to "Home", and the "Styles" section shows "Normal" selected. The document content includes the text "GANTTCHART:" followed by a Gantt chart. The chart has a header row for "2011" with months from January to December. Two activities are listed: "IRB Materials Submitted" (spanning from January to March) and "development of assessment tools" (spanning from March to December). A red arrow points to the "Picture (Windows Metafile)" option in the "Paste Special" dialog box, which is open over the chart. The dialog box shows the source as "Microsoft Office Excel 2003 Worksheet" and lists various paste options. The "Result" section indicates that the contents will be inserted as a Windows metafile picture.

Activity	2011											
	January	February	March	April	May	June	July	August	September	October	November	December
IRB Materials Submitted	█	█	█									
development of assessment tools			█	█	█	█	█	█	█	█	█	█

Paste Special

Source: Microsoft Office Excel 2003 Worksheet
Sheet1!R1C1:F12C13

As:

- Paste: Microsoft Office Excel 2003 Worksheet Object
- Paste link: Microsoft Office Excel 2003 Worksheet Object
- Format (RTF)
- Unformatted Text
- Picture (Windows Metafile)
- Bitmap
- Picture (Enhanced Metafile)
- HTML Format
- Unformatted Unicode Text

Result

Inserts the contents of the Clipboard as a Windows metafile picture.

OK Cancel

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, weekly projections are best.
- 6 months to 1 year, monthly projections will work best.
- >1 year, you should consider quarterly 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 essential 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:

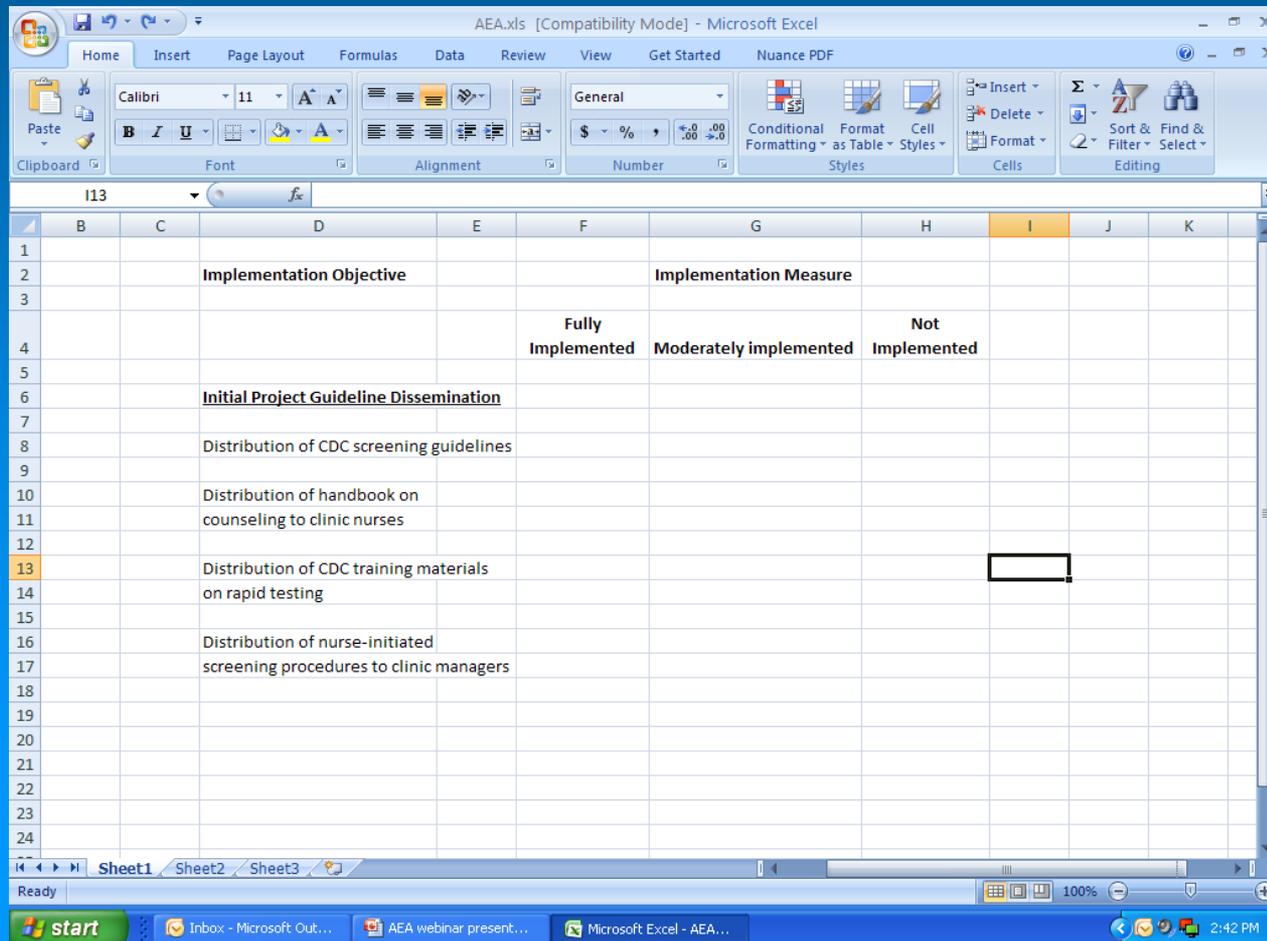
- Fully implemented
- Moderately implemented
- not implemented at all

Creating an Implementation Tracker (cont'd)

Implementation Objective	implementation measure		
	Fully implemented	Moderately implemented	Not implemented
<u>Initial Project Guideline Dissemination</u>			
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.

The screenshot shows a Microsoft Excel spreadsheet titled 'AEA.xls [Compatibility Mode]'. The spreadsheet is organized into columns and rows. Column B is labeled 'Implementation Objective' and column G is labeled 'Implementation Measure'. The 'Implementation Measure' column is further divided into three sub-columns: 'Fully Implemented', 'Moderately implemented', and 'Not Implemented'. The spreadsheet contains the following data:

	Implementation Objective	Fully Implemented	Moderately implemented	Not Implemented
1				
2	Implementation Objective			
3				
4		Fully Implemented	Moderately implemented	Not Implemented
5				
6	<u>Initial Project Guideline Dissemination</u>			
7				
8	Distribution of CDC screening guidelines	✓		
9				
10	Distribution of handbook on counseling to clinic nurses		✓	
11				
12	Distribution of CDC training materials on rapid testing		✓	
13				
14	Distribution of nurse-initiated screening procedures to clinic managers	✓		
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				

A red arrow points to the checkmark in the 'Moderately implemented' column for the objective 'Distribution of handbook on counseling to clinic nurses'.

Creating an Implementation Tracker (cont'd)

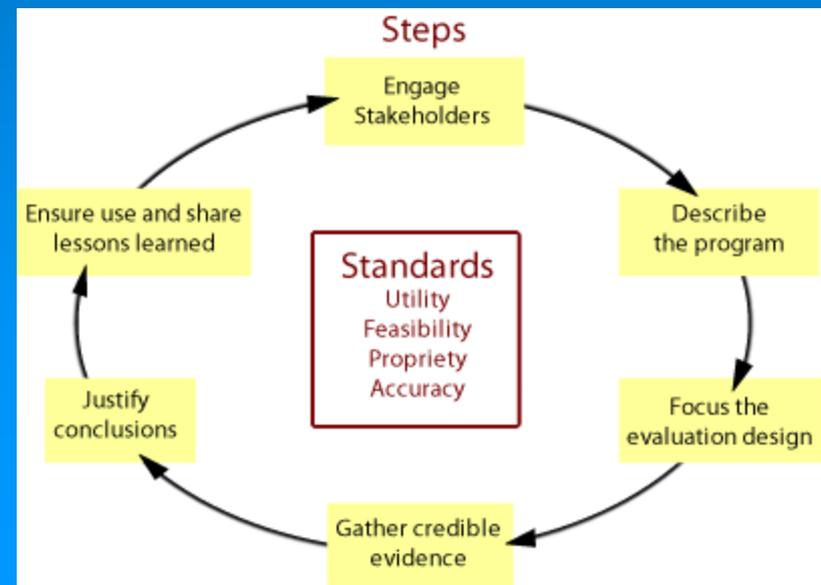
Not only is this a good tool for you to internally gauge how your effort is proceeding, but it is also a good 'audit-feedback loop' for external staff to see how they are doing.

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

Henry D. Anaya, PhD

Evaluation Research Strategies
evaluationresearchstrategies.com

Santa Monica, CA