

OVC Work Planning

Work Session 1.12.26

Objective: Provide guidance on establishing an MS Planner Board to monitor and track City Council work

Kanban Basics

Lean Method to manage and improve work across human systems

Practices of Kanban

- Define and Visualize the Workflow
- Actively Manage the Items in the Workflow
- Improve the Workflow



Kanban Basics

Benefits of Kanban:

- Better transparency and communication
- Improved visualization of the work process
- Easy identification of the problems
- Simple yet powerful tool to track progress

Source: Chisel Blog

Kanban Steps:

- Visually depict work at various stages of a process using 'cards' to represent work items
- Columns ('buckets') represent each stage of the process, i.e., 'To Do', 'In Process', 'Done'
- Cards are moved from left to right to show progress and to help coordinate teams performing the work

Source: Wikipedia

OVC Kanban Board(s) – MS Planner proposed

The image shows a screenshot of the Microsoft Planner interface in 'Board' view. The interface is divided into several sections: a left sidebar with navigation options, a top navigation bar, and a main workspace with four columns representing different stages of a task. Callouts in blue speech bubbles highlight specific features:

- Card for Each Task:** Points to a task card in the 'Backlog' column.
- Label for the Category:** Points to a red 'Planning' label on a task card.
- Subtask(s):** Points to a subtask card within a task card in the 'In progress' column.
- Task Assignment:** Points to a user profile picture assigned to a task card in the 'In progress' column.
- Bucket(s):** Points to the column headers: 'Backlog', 'In progress', 'Blocked', and 'Completed'.
- Due Date:** Points to a red date label '12/21' on a task card in the 'Backlog' column.

The main workspace contains the following elements:

- Backlog:** A column with a search bar, an 'Add task' button, and a task card with a 'Planning' label and a '12/21' due date.
- In progress:** A column with an 'Add task' button, a task card with 'Pink' and 'Green' labels, a 'Customize buckets' option, and a subtask card with a '12/27' due date and a user assignment.
- Blocked:** A column with an 'Add task' button.
- Completed:** A column with an 'Add task' button.

OVC Kanban Board(s) – MS Planner proposed

Columns to show the status of the task:

- Backlog (list of all high-level tasks) that are not started
- In Progress - planner 'card' moved to In progress when it is being worked on
- Blocked - planner 'card' moved to blocked if progress cannot be made until something is cleared (i.e., signature on contract, info needed but not received); make a comment about the reason for the blockage and any help needed
- Completed - planner 'card' moved to Completed when done

'Cards' for high-level tasks

- Create cards for each high-level task to include in the Backlog; this is the body of work the Council member is responsible for. Can be a card with no detail, or can include task assignments, dates, responsible parties, etc.
- When the Card becomes active (in progress):
 - (1) Add detailed subtasks as needed to provide the details on how to complete the task.
 - (2) Assign responsibilities for the tasks
 - (3) Set up a Due Date for the high-level task. When overdue, an email is sent to the responsible part(ies) for the task.

Labels (see Planning Label in example) (Pink and Green have not been assigned a value)

- Use Labels to assist with organizing tasks; one thought is to assign labels for each area of responsibility for the council member