Organizational Skills

Unit: Project Management

Problem Area: Tracking and Managing the Drafting and Design Project

Lesson: Organizational Skills

■ **Student Learning Objectives.** Instruction in this lesson should result in students achieving the following objectives:

1 **Identify organizational skills.**

2 **Identify information management skills.**

3 **Explain the steps in time management.**

■ **Resources.** The following resources may be useful in teaching this lesson:

E-unit(s) corresponding to this lesson plan. CAERT, Inc. http://www.mycaert.com.

"The Art of Filing," *MindTools™.* Accessed Jan. 26, 2014. http://www.mindtools.com/pages/article/newHTE_85.htm.

"Time Management," *MindTools™.* Accessed Jan. 26, 2014. http://www.mindtools.com/pages/main/newMN_HTE.htm.

Vineyard, Ben S., and Grady Kimbrell. *Succeeding in the World of Work,* 7th ed. Glencoe/McGraw-Hill, 2003.

■ Equipment, Tools, Supplies, and Facilities

✓ Overhead or PowerPoint projector
✓ Visual(s) from accompanying master(s)
✓ Copies of sample test, lab sheet(s), and/or other items designed for duplication
✓ Materials listed on duplicated items
✓ Computers with printers and Internet access
✓ Classroom resource and reference materials

■ Key Terms. The following terms are presented in this lesson (shown in bold italics):

➤ delegate
➤ job obligations
➤ organizational skills
➤ schedule
➤ timeline
➤ time management

■ Interest Approach. Use an interest approach that will prepare the students for the lesson. Teachers often develop approaches for their unique class and student situations. A possible approach is included here.

Ask students to think about the challenges they face every day with managing and organizing time and information in their lives. Have students reflect on how they perform via self-evaluations. Some questions to ask might include: Do you tend to procrastinate? Do you meet deadlines for class projects, or do you hurry to complete tasks? Do important papers get lost, or is it always easy for you to find what is needed? Are you usually on time, 10 minutes early, or always late? Do you regularly lose keys or important papers? How much time do you waste in an average day? After having time to reflect, ask students to make a list of ways that they might improve how they organize and manage their time and information. When students have had time to reflect, create a master list on the board outlining organizational skills, as defined by the group.

CONTENT SUMMARY AND TEACHING STRATEGIES

Objective 1: Identify organizational skills.

Anticipated Problem: What are organizational skills, and why are they important?

I. While a career as a drafter or designer involves utilizing strong technical skills, organizational skills are also an important part of success in the workplace. ***Organizational skills*** are self-management skills that involve strategies and techniques needed to help a person organize time and deadlines as well as manage the information and paper in the workplace. Strong organizational skills allow an employee to work effectively and efficiently so all tasks are completed in a timely manner and with accuracy. A person who can stay focused on the task at hand and organize his or her workload will be a valuable employee.

A. Organized workers have several advantages over other employees, increasing their value to the workplace.

1. Employees are more productive on the job when they are organized because papers are easier to access and projects are completed on time.
2. Supervisors and bosses have a better impression of the value of organized employees because work is done in a timely manner, resulting in potential job growth.
3. Having strong organizational skills helps employees become more efficient with time and energy, resulting in happier employees.

B. In a workplace situation, not being organized can cause challenges that may lead to problems for the employees and the workplace.

1. Physically, clutter on a desk or filing area can lead to time lost in looking for information. In addition, missing papers can cause problems that may jeopardize job security.
2. Mentally, an endless list of things to do without a sense of priority can lead to confusion, exhaustion, and decreased efficiency.

C. Overall, several steps can help employees increase their organizational skills. These skills can offer several benefits to employees and the workplace.

1. The items in the workplace area should be evaluated and designated into categories that make sense. Possible categories might include financial, legal, records, supplies, and projects.
2. Everything in the work area should be placed into categories based on the step above, grouped together into tagged boxes.
3. Items that have no real value should be eliminated.

4. Items should be placed into an easily accessible location. Everything in the work area should have a purpose and a place to be stored.

Teaching Strategy: *Use VM–A in a class discussion. You may want to bring in several boxes of miscellaneous items and assign the class to small groups. Each group receives a box to sort through for organizational purposes.*

Objective 2: Identify information management skills.

Anticipated Problem: What skills are needed to effectively manage information important in the workplace?

II. Effectively managing information in a work environment ensures that projects will proceed smoothly. As the amount of paper in the workplace continues to increase, the ability to manage the information becomes essential. If employees cannot find the needed paperwork or tools to effectively work, the job or project cannot be completed. If it is impossible to find the information, it is no longer valuable or useful.

A. The first step is to decide if the information is important. Tell your students to ask the following questions to determine the value of the information:
1. Is this something that I must act upon now?
2. Is this something that I can ***delegate*** (assign the responsibility to someone else) to another employee?
3. Is there someone else who needs this information?
4. Will I need to refer to this information at a later time?

B. If the information is important enough to be kept, it is necessary to consider how to best save and store it.
1. Paper documents are usually best kept in a file folder and placed in hanging folders in a filing cabinet.
2. The files should be organized in a way that makes sense to the employees. Typically, the standard rules of filing apply.
3. The files should be labeled to make finding them easier. Color-coding can visually increase the ease of finding files.

C. Regularly reviewing the filing system can help people remain organized.
1. Once or twice a year, it is necessary to go through the files to discard papers that are no longer important or that have no value to the workplace.
2. At the end of each day, it is important to clear off a work area and to file papers away. It is easy to create piles of paper that will soon become overwhelming.
3. If possible, documents should be saved on the computer. A regular back-up system is essential so important papers are not lost or deleted.

Objective 3: Explain the steps in time management.

Anticipated Problem: What are the steps in successful time management?

III. Success in the workplace is dependent on completing tasks and projects in a timely manner. ***Time management*** is the process of making choices on what task(s) will be completed and when. Five steps should be considered in organizing and managing the use of time.

   A. Initially, it is important to review what needs to be completed and when.

   1. It is essential to list all the activities that should be completed. This may include meetings, appointments, projects, and tasks. The list may be grouped by activity, project, or day.

   2. Short-term and long-term activities should be included.

   3. It is necessary to determine the date and time by which each task must be completed.

   B. The order of importance for these activities must be determined.

   1. After the activities are placed in order of importance, the list may be large and overwhelming. It may appear that not everything can be completed, and this may be true.

   2. Successful time management involves completing the important tasks, not necessarily every task.

   3. A level of importance should be assigned to each task in the list from the previous step. It may be based on job expectations, how the work affects others on a team, or whether ***job obligations*** (tasks that an employee is legally or morally committed to perform) are being fulfilled.

   C. For a major or long-term project on the list, several things can be done to effectively manage the time needed to complete the project.

   1. The project can be divided into a series of smaller and more manageable tasks.

   2. Each of the smaller parts or tasks can be viewed as a separate one with its own timeline and importance.

   3. Clear definitions of each item can be created.

   D. It is best to consider how long it will take to complete each task.

   1. The timeframe may be based on past experience or on company standards.

   2. If the task is unfamiliar to an employee, he or she may ask an experienced co-worker how long the task has taken in the past.

   3. The employee's supervisor can offer a time estimate.

4. Generally, it is better to overestimate rather than underestimate the time needed to finish the work.

E. The final step is to set up a schedule or timeline. A **schedule** is a list or chart of tasks that have to be completed and the completion dates. A **timeline** is a list that shows the order in which tasks must be completed as well as the due dates.

1. The schedule or timeline will allow an employee to plan daily activities as part of long-term goals. A calendar or daily planner can aid in the management of this information.

2. Considering personal work habits can improve work completion. Planning the most challenging tasks at a time of peak performance will improve success.

3. Color-coding can help organize activities. One idea is to group similar tasks together; the files can be coded with the same color for visual recognition.

> **Teaching Strategy:** *Use VM–C. Have each student create a personal timeline. Assign LS–A.*

■ Review/Summary.
Use the student learning objectives to summarize the lesson. Have students explain the content associated with each objective. Student responses can be used in determining which objectives need to be reviewed or taught from a different angle.

■ Application.
Use the included visual master(s) and lab sheet(s) to apply the information presented in the lesson.

■ Evaluation.
Evaluation should focus on student achievement of the objectives for the lesson. Various techniques can be used, such as student performance on the application activities. A sample written test is provided.

■ Answers to Sample Test:

Part One: Completion

1. Organizational skills
2. backup
3. color coding
4. job obligation
5. time management
6. delegated

Part Two: True/False

1. T
2. F
3. F

4. T
5. T
6. F

Part Three: Short Answer

1. Answers should be three of the following: They are more productive on the job, papers are easier to access, projects are completed on time, supervisors have a better impression, potential job growth exists, they are more efficient with time and energy, and they are happier employees.
2. Answers should include the following:
   - Must I act upon it now?
   - Can I delegate?
   - Does someone else need this information?
   - Will I need to refer to this information at a later time?
3. Answers can be three of the following:
   - Review the material and due dates.
   - Decide the order of importance.
   - Divide long-term projects into stages with due dates.
   - Create a schedule or timeline.

Name _____

Organizational Skills

▶ **Part One: Completion**

Instructions: **Provide the word or words to complete the following statements.**

1. _____ are self-management skills that involve strategies and techniques needed to help a person organize time and deadlines and manage information and paper in the workplace.

2. Save documents on the computer, and have a regular _____ system so important papers are not lost.

3. One way of visually organizing paperwork is by using a method called _____.

4. A/an _____ is a task that an employee is legally or morally committed to perform to complete his or her job duties.

5. Understanding what needs to be done and when it must be completed is called _____.

6. If an employee assigns the responsibility of a task to someone else, the task is _____ to another employee.

▶ **Part Two: True/False**

Instructions: **Write *T* for true or *F* for false.**

_____1. The first step in time management is deciding what tasks need to be completed and when.

_____2. While having strong organizational skills is good for most people, it is not an important skill for a good employee to have.

_____3. All information is valuable or useful and should be kept.
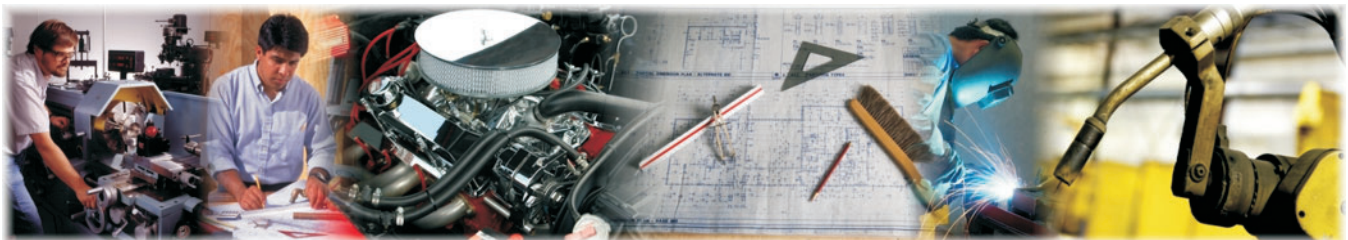
_____4. Labeling files when saving information helps an employee find and retrieve the papers.

_____5. A timeline is a list of things that need to be done with a deadline or due date of when the work needs to be completed.

_____6. Planning the easiest tasks for peak performance times will improve success.

▶ Part Three: Short Answer

Instructions: **Answer the following.**

1. Workers who are organized have several advantages over other employees. List three advantages.

2. When making a decision on the importance of informational papers, what four questions might be asked?

3. What are three steps that should be taken when deciding how to organize and manage your time?

IDENTIFY ORGANIZATIONAL SKILLS

What are the advantages of having strong organizational skills?

Organized employees share several advantages over disorganized ones:

- ◆ They are more productive.

- ◆ Projects are completed on time.

- ◆ Potential job growth may be a result of organizational skills.

- ◆ They are more efficient with their time.

- ◆ Mentally, they are less confused and exhausted.

- ◆ They are generally happier.

Their workplaces:

- ◆ Workplaces will be less cluttered.

- ◆ They will have cleaner desks.

- ◆ Papers will be easier to find.

- ◆ It will be easier to find work tools and materials.

INFORMATION MANAGEMENT SKILLS

What questions might I ask myself in determining the value of information?

Is the information important and will I:	Act upon the information now?
	Delegate the task?
	Give information to someone?
	Need it at a later time?
If I decide to keep information, should I:	Place it in a file folder?
	Organize it in a way that makes sense?
	Label the folder?
	Color code for visual ease?
Once it is organized, should I:	Regularly review it at least once a year?
	Get rid of unessential papers?
	Clear off the desk at the end of the day?
	Avoid making piles of papers?
	Save on the computer and back-up?

STEPS IN TIME MANAGEMENT

Review tasks	What has to be done?
	When does it need to be completed?
	Include long-term and short-term tasks.
Evaluate for importance	Complete only important tasks.
	You may not need to complete every task.
	Assign a level of importance to every task (A, B, or C).
Divide long-term and large projects	Divide projects into smaller tasks.
	Treat each small task as its own project.
	Clearly define what needs to be done.
Determine time needed	Time should be based on past experience.
	Ask for a co-worker's experience.
	Get your supervisor's advice.
	It is better to overestimate time needed.
Create a schedule/timeline	It is easier to plan daily actions.
	Plan according to personal habits.
	Color-coding helps organize things visually.

Name _____

Organizational Skills

Purpose

The purpose of this activity is to identify specific skills used in organizational skills.

Objective

Create a presentation using specific skills and steps used in organizational skills.

Materials

- ♦ writing utensil
- ♦ computer with Internet connection
- ♦ software (e.g., Microsoft PowerPoint)
- ♦ poster board, 18" × 24" (or any size wanted)
- ♦ lined paper
- ♦ scissors
- ♦ glue
- ♦ old magazines for images and words

Procedure

1. Imagine the following scenario. You are working with a group of students and teachers to plan next year's homecoming week, including each day's events and the pep rally for the big football game. The team's goal is to plan and organize every event and include a schedule or timeline with a list of what needs to be done and when it must be completed.
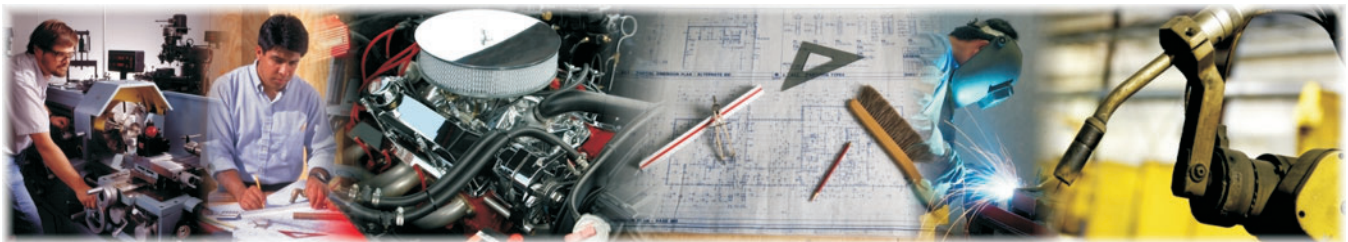
2. First, as a class, brainstorm regarding the activities and events that should be included during the week. Because planning the week is so involved, this list will need to be divided into smaller and more manageable parts.

3. Next, work with two or three others to create a presentation that will reflect the activity or events you are helping to plan. Take notes on your lined paper. All details should be considered and addressed.

4. From the list created earlier, you can choose from several possible (but not limited to) topics, including:

   ♦ Dress-up day(s)
   ♦ Pep rally
   ♦ Homecoming dance
   ♦ Cafeteria competitions

5. The presentation can be in one of several forms: PowerPoint, poster, or paper. In addition, technology (e.g., Moviemaker or Photostory) can be used. If you make a poster, you may be provided with poster board (standard 18" × 24"), scissors, and glue. The images will be your responsibility and may be obtained from old magazines or the Internet.

6. The presentations should feature the steps taken to organize the parts of each of these aspects of homecoming, along with the timeline. Also, include the things that need to be done that would be important to complete the task.

7. Upon completion, your team may be asked to present to the class.