



PMO Lite

Planning Tools for People Who Already Do Too Much
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Melanie Fisk, MSW, MBA
Principal & Founder
Adaptive Ascent Group





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Melanie has spent 20+ years leading change across nonprofit and public-sector settings, including serving as CEO of Literacy Advance of Houston, where she guided merger with Memorial Assistance Ministries (MAM) that doubled service capacity.

She holds a BS in Sociology, an MBA in Leadership, an MSW in Administration and Policy, and certifications in Prosci Change Management and IDEO Design Thinking. She founded Adaptive Ascent Group to bring senior-level strategy and design support to small and mid-size nonprofits.



We're All Saying the Same Thing. Aren't We?

► Nonprofit/CBO language IS business language!

- Business language gets funded. Nonprofit language gets doubted.
- Say “project management” and people nod.
- Say “we’re stretched thin and reacting to whatever’s loudest” and people assume you have no plan.

This session simplifies planning using a project management mindset.



Mindset Shifts & What Shared Language Gifts Us

► But you SAID you would do it, didn't you?

- Mindset shifts sound easy and are anything but.
- No 2 people ever hear the same thing from the say conversation.
- Our current reality of rapid change requires adaptation, which comes from stability.

Shared language around project management is the scaffolding every team needs to implement strategy AND to gift themselves a celebration for accomplishing what often feels impossible.





The Bigger Picture

What's a PMO Anyway?



Project Management Office (PMO)

► Ahhhhh, what would that be like?!

- Entire team focused on strategic implementation.
- Defines portfolios of work (Initiatives)
- Defines and tracks projects & project phases within each Initiative.
- Specializes in identifying contingencies & resource barriers.

US? In this room? Why, we're generalist unicorns who are managing projects, while tracking, while dancing, while sipping coffee, while...



Checking Assumptions

► So...What IS a project?

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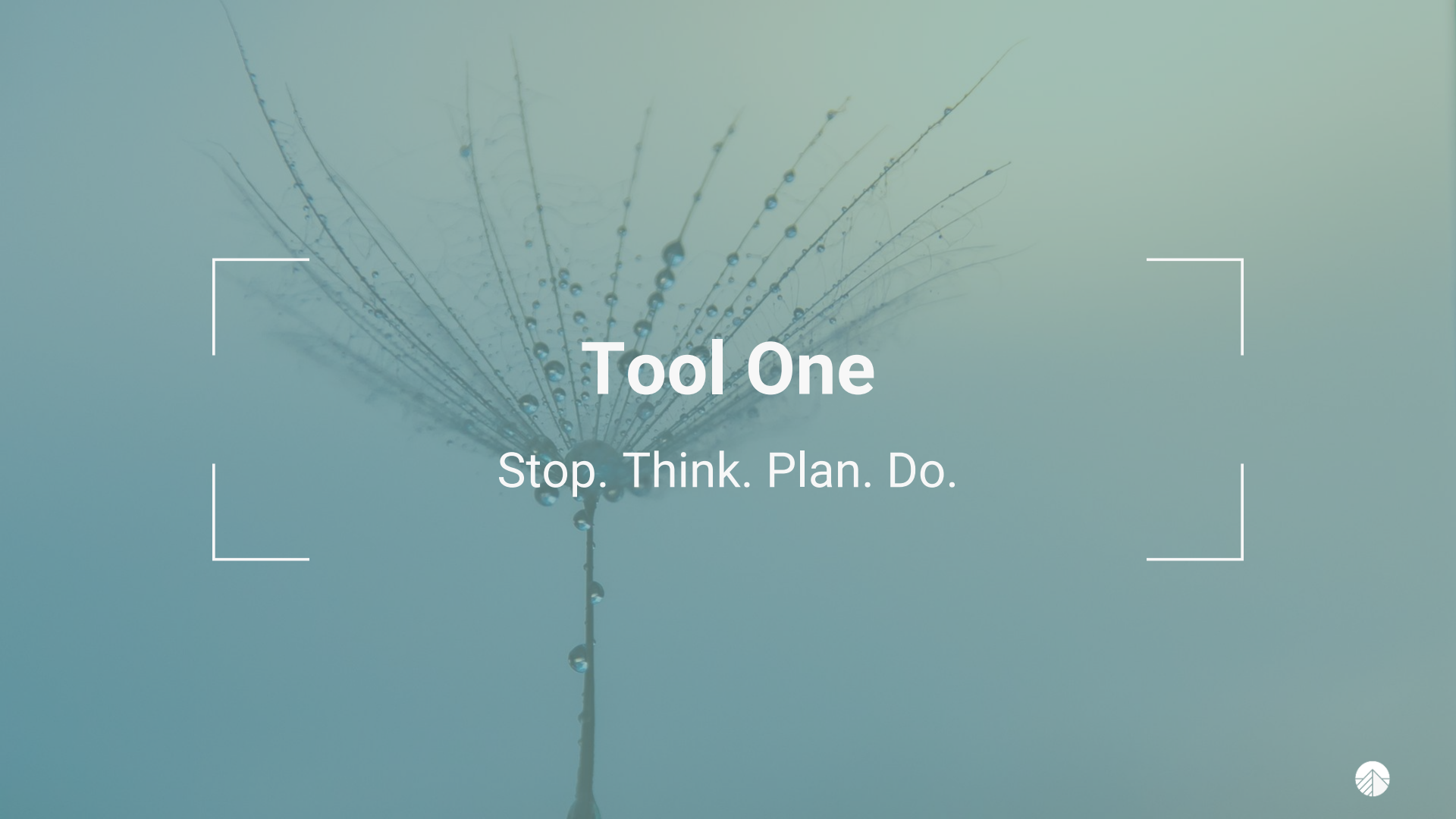
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Table Talk

- ▶ **Talk about a real-world example when a project assigned to you got stuck. What happened? What barriers came up for you? For the project?**





Tool One

Stop. Think. Plan. Do.



The Four Steps

01

Stop

What am I actually being asked to do?

02

Think

What kind of work is this, and can I finish it alone?

03

Plan

What's missing, and what's the next best step?

04

Do

Act, pause, or bring it to the CEO/LT/Supervisor. Then commit.



Four Possible Outcomes

► Not every ask needs the same response

Running something through Stop/Think/Plan/Do sorts it into one of four buckets.

Naming the bucket is most of the work.

Four Possible Outcomes

Do Now	Start, Then Pause	Can of Worms	Bring to CEO or Leadership Team
Clear ask, clear owner, low risk, quick finish. You can proceed with confidence.	Clear enough to begin, but not enough to promise a full finish. Proceed once you document a plan for getting missing info.	The ask uncovers bigger issues, missing info, or unclear ownership that must be resolved before starting task/project.	Needs a decision on priority, timing, risk, money, or cross-team direction. Escalate to ensure you're moving in the right direction.

Answering the questions below will help you determine how you should approach your project



Commitment and Escalation

► Naming it isn't enough

Every Stop/Think/Plan/Do worksheet ends with a commitment: an owner, a date, a next action. And a clear line for when it stops being yours to solve alone.

☐ Do Now ☐ Start First Step Only ☐ Pause and Clarify ☐ Bring to CEO/LT

My Commitment

Owner:

By When:

Next Action(s):

When to escalate:
Use immediate escalation when the work affects money, billing, payroll, compliance, contracts, safety, or a same-day deadline. Use your next 1:1 or Leadership Team meeting when the work needs a decision on priority, ownership, integration, or timing

 2 If this sparked your curiosity about how to bring a project management mindset to your team, book a discovery call to learn more about Adaptive Ascent Group coaching & integration services.





Tool Two

The Can of Worms



The Can of Worms

► When the ask is bigger than it first seemed

More people, more systems, a decision you can't make alone: that's a Can of Worms, not a Do Now. This is not failure. It's the signal that the work needs to be untangled before anyone commits to it.

Before You Begin

Use this when...	Do not use this when...
• The task got bigger • More people, systems, or decisions are involved • The issue keeps repeating • Leadership input is needed	• The task is clear • You can finish it quickly • No wider decision is needed • The fix is obvious and contained

Untangle the Work



Live Practice

► How this works

Work solo first: pick one real project sitting on your desk right now and run it through the Stop/Think/Plan/Do worksheet.

Then turn to a neighbor. Walk them through your answers and ask: what did I assume that might not be true?

Go fast and rough. This is a first pass, not a final plan.





Applying It to the Bigger Picture

Annual Planning



Where Initiatives Live

00

Your Strategic Plan

Programs – Fundraising – Admin are where initiatives already live.

02

Example - People & Culture

Staffing, culture, morale, the human side of the organization

03

Example - Knowledge Management

Institutional knowledge and systems that outlast any one person

04

Example - Resource Development

Program design, evaluation, and the work that keeps funding coming

