**PROJECT PLANNING AND MANAGEMENT**

**BUILD A STRONG FOUNDATION: *Create a Tentative Plan***

 

There is a plethora of approaches to project planning and management. Many of them are from the business community and may be less relevant for the academic context. However, this guide provides you with a few key tips relevant for any project planning and management context and offers an overview of the differences between traditional and agile project management.

**Project Planning Steps**

1. Define the project
   1. Put the goals in writing
   2. Establish a budget and determine what other resources are needed
   3. Set meeting times with partners to do the detail-oriented project planning work together. Consider using an online meeting time selection tool, such as [Doodle](http://doodle.com/?home), to find common meeting times that work for larger groups.
   4. Decide on a communication structure and avenues
   5. Define roles and responsibilities
   6. Put together a timeline
2. Create a scope or written plan
   1. Put the details established in phase 1 in writing in a shared online document that you can adjust as things change
      1. Include the overall goal of the project and the individual deliverables or outcomes that will contribute to achieving that goal.
      2. Prioritize based on a very conservative estimate of what can get done. Community-engaged projects require a lot of time spent building relationships. In terms of project outcomes, keep this in mind and think small and useful.
   2. If you have a complex structure (with different student groups working with different partners, for instance), consider using T-square, or a tool specifically created for project management, such as [Basecamp](https://basecamp.com/), [Trello](https://trello.com/), or [Org-mode](http://orgmode.org/)
      1. If you do use a project management tool, remember to create simple protocols for how and when information, deliverables, and discussions should happen on the site
   3. Create a shared online calendar, pre-populate it with key dates and meetings, and send out invitations
   4. Questions to consider: which parts of project planning and management should you give to the community partner and which aspects should you take on (remember to consider their workload and the degree to which the project is benefiting them)? Are there any components of project planning and management you should include in expectations of students? For example, can they review and provide feedback on one another’s work? Can you crowdsource certain questions to the students as a group as opposed to having them all automatically directed to you?
3. Execute the project
   1. You’ve done the work to make introductions and set expectations and the project is underway
   2. Distribute resources and tasks
   3. Check in with students and partners regularly
   4. If you are using a project management site, set times to review materials, discussions
   5. Follow your timeline
   6. Adjust the plan as needed, anticipating challenges, changes to the timeline, and even the structure
4. Monitor project performance
   1. Set benchmark dates to monitor progress and compare it to the plan
   2. Invite groups to adjust their plans and schedules based on the reality of doing the work and change the plan and structure accordingly
5. Project close
   1. Include evaluation questions to students and partners about overall project structure, planning, and management
   2. Adapt your approach to project planning based on the feedback
   3. Write up the final results of the project goals and outcomes and include it in the shared scope you developed with the partners
   4. Decide on how project outcomes will be shared, by who, and on what timeline. Get your community partner’s feedback on how you might share the work (presentations at Tech or to the outside community, use in research or publications, etc.)

You may prefer “agile” project management methods—adapted from software development—to traditional methods, since the nature of teaching and research work requires a more decentralized structure (you are not being paid to be a project manager). Agile structures are even more important for design studios or open-ended, exploratory engagement projects, and can help to support some of the important goals of high-quality community-engagements such as: building authentic relationships and challenging inherited privilege and power. If a more decentralized and iterative structure is better suited to your work, consider adapting Agile Project Management techniques in your work (see the chart below comparing agile and traditional techniques).

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| Agile Project Management | Traditional Project Management |
| Individuals or teams work independently and can decide on their own how to achieve overall goals, as long as they follow agreed upon rules. | Teams are more tightly structured, working on specific deliverables, under a clear and shared process and based on a tight timeline. |
| Plans for deliverables are developed within the process as needs emerge. This may be a better structure for exploratory or studio-based courses and/or for graduate students. | Goals and plans for deliverables are set before the project starts. The final outcomes should match the goals set at the start. This might be a better structure for undergraduate students. |
| Feedback from partners is built into the work so that it is easier to make changes as you go. While this structure is time intensive, in a community-engagement setting, where students and partners are often coming from very different backgrounds, it may be a good process, both for relationship-building and for ensuring that the final project is useful for the community organization. | Feedback is provided at the end of the project, when everything is complete. This may risk partners not being happy and it cuts out some of the work-based relationship building that can be important. On the other hand, if community partners do not have much time, it can be a good approach, especially for projects dealing with more straightforward outcomes (a presentation on census data trends, for instance). |

*Adapted from: “Agile Methodology,” http://agilemethodology.org/*