Developing the Project Management Section of a Proposal

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Proposal Development Team
Office of Research & Sponsored Projects (ORSP)
Introductions

ORSP Proposal Development Team

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Workshop Topics

Components of a Project Management Plan

Project Timeline
COMPONENTS OF
A PROJECT MANAGEMENT PLAN
Project Management Components

- Personnel & organizational structure
- Planned collaborations
- Project implementation schedule
- Project risks and limitations
- Optional subsections
  - Financial management & institutional resources
  - Subcontract management
  - Acquisition and maintenance of instrumentation or equipment
Personnel & Organizational Structure

- Describe **qualifications and experiences** of the Principal Investigator (PI) and project team
- Describe how overall program will be **directed and implemented**
- Clearly **lay out the various participants and their roles and responsibilities** in the project
  - Relate to activities in project
  - Describe reporting structure
- May include **an organizational chart** to show personnel interaction
- Explain role of advisory committees if part of project
Activity: Review of Examples

Criteria:
- Presents team’s qualifications and experience?
- Describes roles and responsibilities?
- Describes reporting structure?

Question:
How would you show how the project will be implemented?

Time Limit: 15 minutes
DISCUSSION
## Project Implementation Schedule

- Outline **activities/tasks** of the proposed project as they relate to the project goal and objectives, including evaluation.
- Set a timeline for various stages of the project.
- Define the milestones associated with the project.
- Provide benchmarks, if applicable.
- Describe how the project will be tracked, e.g., reporting structure.
Financial Management & Program Risk

Provide information on:

- Financial systems and safeguards used to ensure the reliable management of program finances
- Project and Institutional resources
- Program risks - describe alternate plans if necessary
Subrecipient Management & Planned Collaborations

- Describe collaborative proposal partnerships
- Identify subrecipients and existing relationship
- Describe means and structure of communication
- Describe processes used to manage subrecipients to ensure program goals and requirements are met
- Provide information on contractual arrangements
- Identify and describe existing relationships or plans to expand relationships with internal or external collaborators
DEVELOPING A PROJECT TIMELINE
Don’t leave it up to the reviewer’s imagination as to how you will get it done

– Include the evaluation effort early in the timeline
– Indicate initiation and duration of activities
– Identify milestones and expected dates of completion
– Balance the amount of detail with information needed

Provide a realistic timeline
Types of Project Timelines

- **Basic** timelines

- **Gantt chart** is a graphical representation of the duration of tasks against the progression of time

- **Pert chart** is a model for project management designed to analyze and represent the tasks involved in completing a given project
CREATING A BASIC TIMELINE
<table>
<thead>
<tr>
<th>Year 1</th>
<th>Project Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>January – March 2010</td>
<td>Plan experiment</td>
</tr>
<tr>
<td>April – June 2010</td>
<td>Collect data</td>
</tr>
<tr>
<td>July -September 2010</td>
<td>Conduct experiment</td>
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<tr>
<td>October – December 2010</td>
<td>Prepare and administer survey</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Year 2</th>
<th>Project Activities</th>
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</thead>
</table>
| January – March 2011 | Complete data collection  
Start data analysis |
| April – June 2011 | Complete data analysis |
| July -September 2011 | Conduct comparative analysis |
| October – December 2011 | Prepare report |
Basic Text Timeline

**Work Plan- Year One:**

- Conduct an ethnographic study of newsrooms to identify key aspects of the social context that news organizations use to build information montages
- Implement initial prototype ABC server for collecting and disseminating basic readership statistics
- Release a desktop MeedFeed prototype to a selected community of Northwestern users for initial feasibility testing
- Translate a set of search techniques (hill climbing, simulated annealing, tabu search, evolutionary algorithms) to operate within a Clifford algebra framework

**Outcomes:** Representations and models for montage construction will be established; Theoretical feasibility of search using Clifford algebras will be determined; Demonstrate personalization effects

**Outputs:** Initial experimental software framework will be deployed amongst a small user community
Work Plan - Year Four:

- Analyze empirical data from user community observations
- Extend the MeedFeed concept to another physical context: e.g. news reading within an interactive physical space (smart environment) or on a Tablet PC device
- Implement a centralized Web version of MeedFeed, to investigate the potential of sharing and amortizing evolutionary searches across communities
- Benchmark, evaluate, and potentially revise search algorithms
- Benchmark, evaluate, and revise social network analyses

**Outcomes:** Insights into community behavior from empirical studies; Rigorous evaluation of the potential and limitations of the two key elements of evolutionary journalism; Demonstration of amortizing the cost of evolutionary search across users

**Outputs:** Empirical data for other researchers to investigate; Two new instantiations of the MeedFeed concept
## Tabular Timeline (GANTT Chart)

<table>
<thead>
<tr>
<th>Project Activities/Tasks</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
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<tbody>
<tr>
<td></td>
<td>0-6 months</td>
<td>6-12 months</td>
<td>0-6 months</td>
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<td>Activity 1</td>
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<td>Activity 7</td>
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<td><strong>Project Evaluation</strong></td>
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<tr>
<td><strong>Prepare final report</strong></td>
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Pert Chart
Sample Proposal Planning Timeline

- Identify, contact and confirm Co-PI’s and/or collaborators*
- Notify ORSP Proposal Development Team (DevT) & ORSP Research Administrator (RA) of proposal intentions
- Outline Solicitation and requirements
- First draft budget and submission planning meeting with ORSP RA
- First rough draft narrative sections
- First draft narrative – review & send for edit by DevT
- Submit requests for collaboration, commitment, institutional support letters, etc.
- Contact ORSP RA on any budget changes
- Biosketches, current & pending or other required forms completed
Sample Proposal Planning Timeline

- Second draft narrative – edit, send to DevT for agency review criteria
- Finalize budget, prepare budget justification
- Complete Abstract or Project Summary
- Complete narrative & other sections of proposal -submit to DevT for review
- Submit narrative for internal and external review from senior colleagues
- Incorporate review recommendations and prepare **Final Draft**
- Appendices – provide departmental letters, collaboration letters, institutional support letters (if required) and submit to OTSP RA
- Final submission review
- Submit final documents to ORSP RA
PROJECT TIMELINE TOOLS
Project Timeline Software Tools

• **Excel** Spreadsheet Templates
  [http://www.vertex42.com/ExcelArticles/create-a-timeline.html](http://www.vertex42.com/ExcelArticles/create-a-timeline.html)
  **Sample**: Excel spreadsheet

• Microsoft **Visio** templates

• **Word** document tables

• Project management software on web

• Microsoft Project
Reflection

What did you learn today that was new?

What would you like to learn more about?

What elements of the workshop did you find the most relevant?