

From [Catherine Gynn](#)

## Project Management of Your Learning Community

Adapted in part from information provided by P-Cubed. See their website at <http://www.pcubed.com>

From the first ideas to the final evaluation, undertaking an innovative project is a complex, challenging business. Initial chaos somehow has to develop into a defined project, and the project has to produce results that answer a given need in a way that others can adapt and emulate.

At the January Learning Institute, Learning Community project teams will be sharing their projects with each other. To document the development of your Learning Community, to prepare for the Institute, and to help move us all from chaos to replicable ideas, an abbreviated project management framework is provided for your use.

### Part One: Creating a Project Charter

#### Overview

The purpose of a Charter is to define at a high level what the Project Team will deliver, what resources are needed, and why it is justified. The Charter also represents a *commitment* to dedicate the necessary time and resources to the project. For this reason, the Charter should be shared with all major stakeholders, securing sign-off when appropriate. The document should be brief (up to three pages maximum). It should contain the following sections, some of which will come from your initial grant proposal:

#### I. The Purpose, Success Factors, and Benefits of the (NAME OF THE) Learning Community

*This section describes why your learning community is being initiated, and what you expect the benefits of the outcome to be*

##### A. Learning Community Purpose

*What is the justification for initiating the project (e.g., increase quality, decrease costs, improve access)?*

##### B. Critical Success Factors

*How will you know that the learning community is a success?*

##### C. Expected Benefits

*Quantify whenever possible, including any return on investment calculations, but also speak to “return on value” in terms of other benefits.*

## **II. The Objectives, Primary Deliverables and Management of the (NAME OF THE) Learning Community**

*This section clarifies what is expected, what will be delivered during the project, who has control over these outcomes, and who is interested in these outcomes. In determining the scope of your Learning Community (below), identifying what will be specifically “excluded” from the deliverables will help keep the team focused.*

- A. Primary Objectives**
- B. Primary Deliverables**
- D. Management of the Learning Community**
- E. Stakeholders for the Learning Community**
- F. Grantor Expectations** (in this case, the Ohio Learning Network)

## **III. Resource and Cost Estimation of the (NAME OF THE) Learning Community**

*This section should include people, equipment and funding. All of these can be further refined during the project planning process (below).*

## **IV. Stakeholders**

*Identifies anyone who has a vested interest in the success of the project, so that their expectations can be better understood throughout the project lifecycle.*

### **Project Charter Timeline**

*Complete the Project Charter prior to beginning work on the project plan.*

### **Project Charter Checklist**

- Purpose
- Assessment Criteria
- Benefits
- Objectives
- Resources
- Stakeholders

## Part Two: Creating a Project Plan

A project plan should answer the key journalistic questions of “who, what, where, when, how, and how much.” This covers the resources (people, facilities, equipment, and materials) that will be needed, and identifies project activities with a schedule that includes an estimate of when each activity will take place, and what resources are required to finish the tasks.

The project plan document is expected to change over time as more information about the project becomes available. Let this help guide your team to accomplish its tasks, but not constrain anyone from making necessary changes. The key is identifying what is necessary and what is beyond the scope of the project. To this end, the plan should document the scope of the project; clearly define the deliverables the project will produce; what resources are needed; the tasks involved and who will accomplish each task; assessment criteria for success; and evaluation of the project.

### I. **Scope Statement**

The scope statement defines the initial range of the project. It will inform future decisions about changes to project activities and deliverables.

#### A. **Scope Description**

Describe the project’s academic and administrative objectives (with an emphasis on assessment of these objectives) along with the final deliverable of the project, using terms that are easily understood. Include specific target dates when the project will begin (the acceptance of the grant) and formally end (for example, the point at which the Learning Community delivers usable assessment data or the point at which the data will be evaluated).

#### B. **Scope Boundaries**

What is included in the Learning Community scope, and specifically what is not included (to avoid later confusion). Identify any known overlap with other projects.

#### C. **Contingency planning (managing risks)**

Contingency planning discusses what steps will need to be undertaken if the Learning Community criteria for the final deliverable are not met. This step in the plan encourages the project team to anticipate countermeasures to overcome obstacles and proceed with the project. To write this part of the statement, brainstorm possible problems and possible solutions to those problems. Also describe major risks or constraints associated with the alternate activities, and who on the project team will lead each countermeasure. Addressing the possibilities builds in needed flexibility to your project plan.

#### D. **Project Deliverables Acceptance Criteria**

The project deliverables are described in the Project Charter. In this section, the project team should develop acceptance criteria for the final project deliverable, and

create a schedule of major interim deliverables with their acceptance criteria. A “review and approve” table with review dates and people conducting the reviews for deliverables will be helpful in tracking the interim deliverables (sample attached).

## II. Work Breakdown Structure

This section shows how the project will be broken down into sub-projects, the deliverables that will be produced for each sub-project, and who is accountable for each sub-project. A good work breakdown schedule will help keep the team clear on the status of each deliverable and articulates the measures used to judge completion. It will have starting and ending dates of activities clearly stated, along with the deliverable of each sub-project.

- A. Describe the work breakdown in sufficient detail to manage the small pieces of each activity. Keep focused on the deliverable that the activity is meant to produce.
- B. Identify the interdependencies among the work deliverables (the critical path elements that affect other portions of the project, establishing predecessor/successor relationships).

## III. Resources

### A. Project Team Members.

List the names of individuals (or categories of required staffing) for the project team along with their status as regular or ad hoc members.

### B. Project Stakeholders.

List each project stakeholder and their status, including who on the project team will be the primary liaison for each stakeholder.

## IV. Schedule and Budget

### A. Schedule.

Based on information collected thus far, create a schedule for project staffing effort (based on estimates and/or forecasts) needed to achieve project milestones and deliverables.

### B. Budget.

Create a project budget based on the Schedule information and other cost assumptions.

## V. Communication Plan

Establish how the Project Team will inform all involved parties on project information, timely updates, and performance reporting. Also, outline how the Project Team will ensure an open, two-way exchange of information, ideas, recommendations and concerns regardless of physical location. Include training for team members as needed.

## VI. Change Management

Decide how the project team is going to handle changes to the project. Good project management includes procedures that can be used to approve review and approve any significant changes to the original scope, budget and schedule. This documentation becomes part of the Project Plan for future reference.

## Conclusion: Benefits of Project Planning

Definition of the objectives of the project team, and a high-level commitment to these objectives by the team and its stakeholders, help assure successful completion. Additionally, the project plan allows multiple members of the group, as well as those outside the group, to understand what is going on at any given point. It serves an archival function in helping others duplicate the project.

Make sure there is room for the intuitive aspects of what the learning community is attempting to accomplish. The process is meant to help organize people and things in both informal and formal ways so that the work can get done. Don't let the form get in the way of the substance, but don't let the substance escape without leaving its imprint for others to see.

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