Developing the Project Management
Section of a Proposal
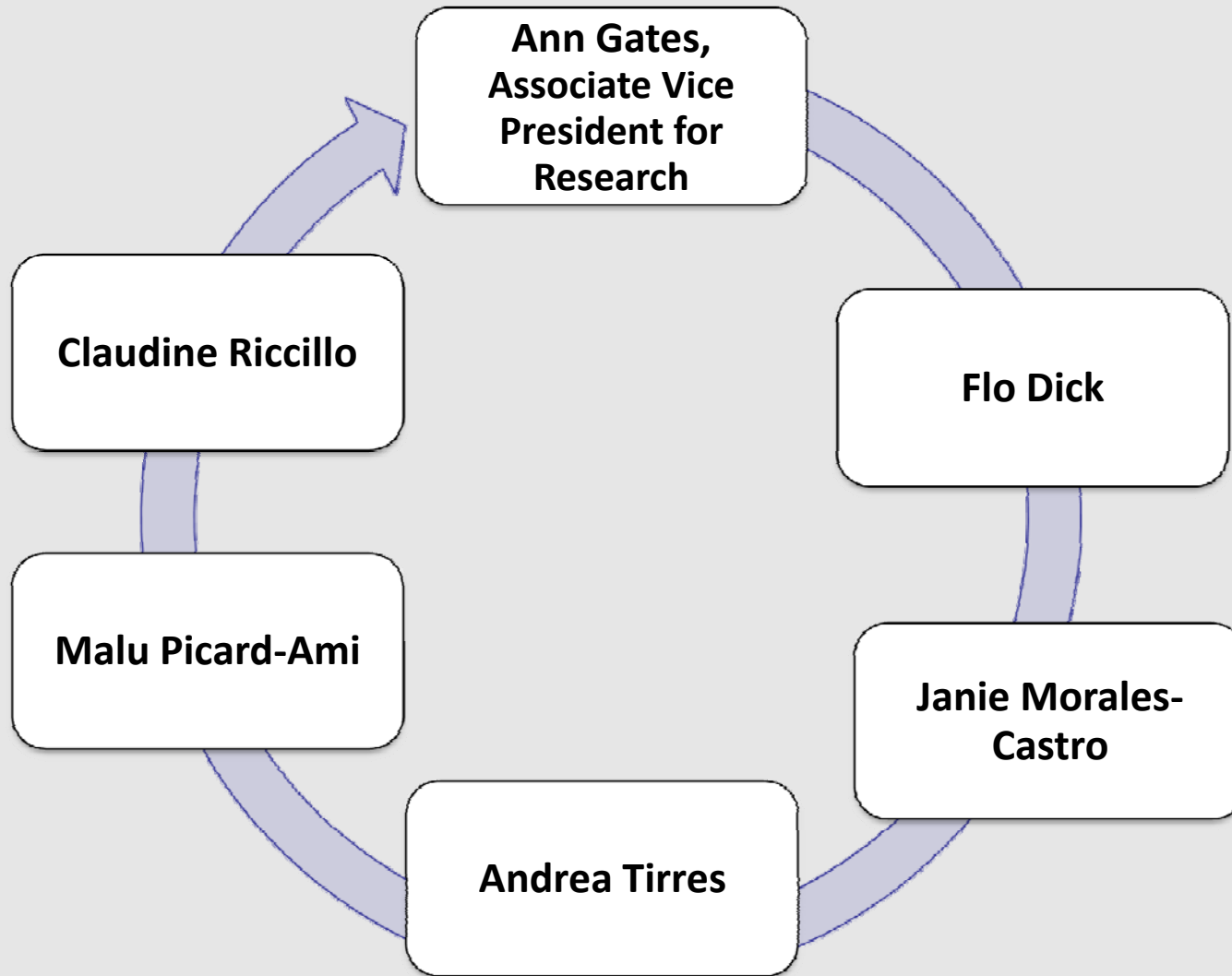
January 17, 2012

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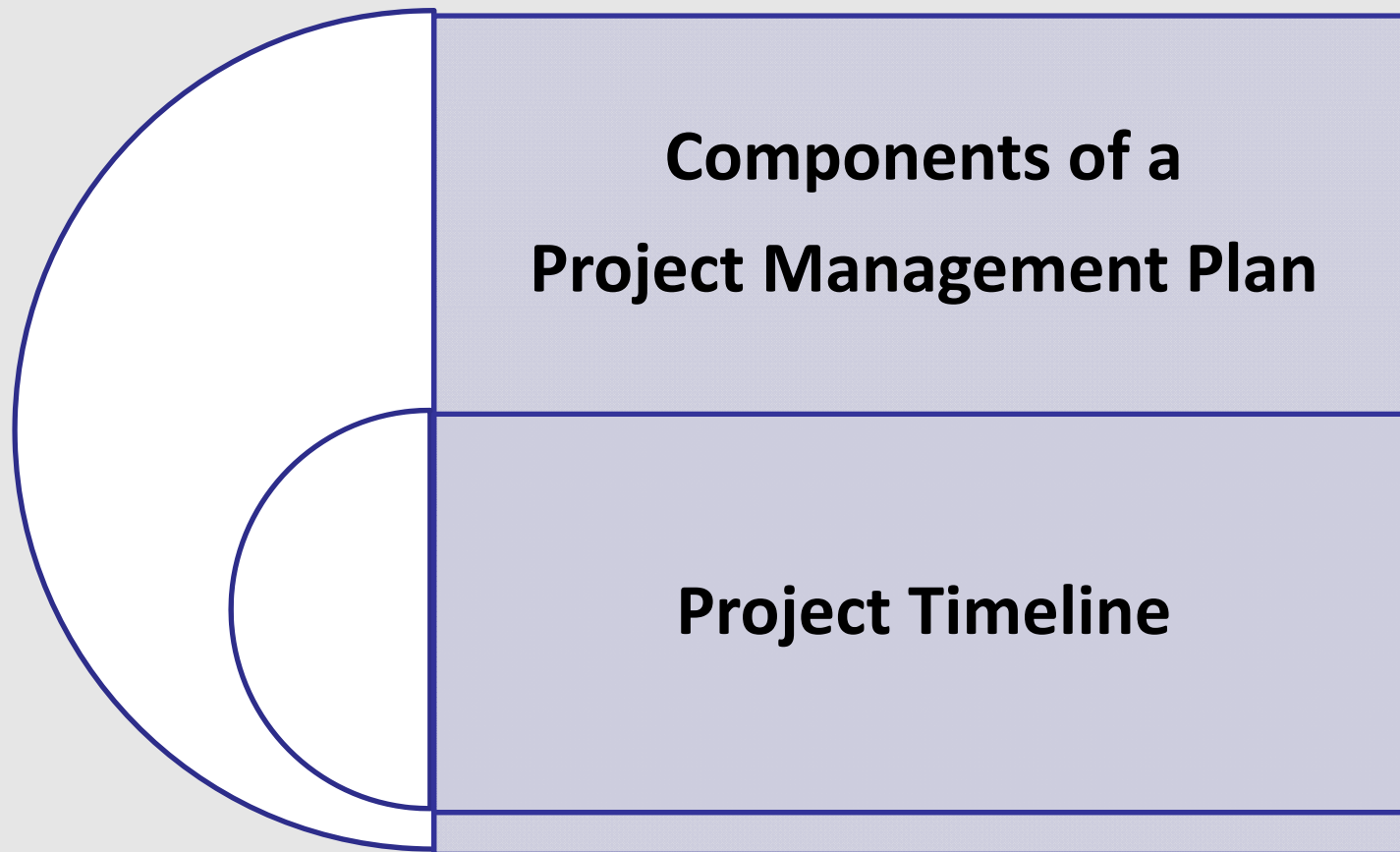
Introductions

ORSP Proposal Development Team

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

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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

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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

Basic Project Timeline

Project Timeline	Project Activities
Year 1	
January – March 2010	Plan experiment
April – June 2010	Collect data
July -September 2010	Conduct experiment
October – December 2010	Prepare and administer survey
Year 2	
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
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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

Basic Text Timeline

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)

Project Activities/Tasks	Year 1		Year 2		Year 3	
	0-6 months	6-12 months	0-6 months	6-12 months	0-6 months	6-12 months
Activity 1						
Activity 2						
Activity 3						
Activity 4						
Activity 5						
Activity 6						
Activity 7						
Project Evaluation						
Prepare final report						

Pert Chart
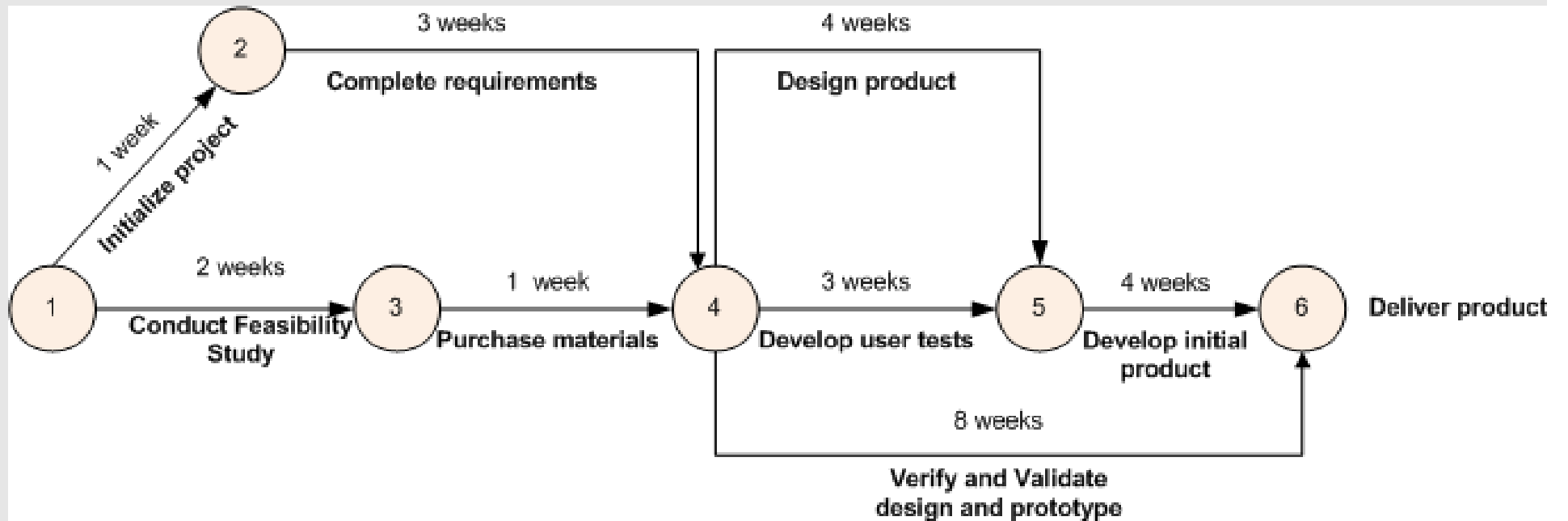
Sample Proposal Planning Timeline

o Identify, contact and confirm Co-PI's and/or collaborators*

o Notify ORSP Proposal Development Team (DevT) & ORSP Research Administrator (RA) of proposal intentions

o Outline Solicitation and requirements

o First draft budget and submission planning meeting with ORSP RA

o First rough draft narrative sections

o First draft narrative – review & send for edit by DevT

o Submit requests for collaboration, commitment, institutional support letters, etc.

o Contact ORSP RA on any budget changes

o Biosketches, current & pending or other required forms completed

Sample Proposal Planning Timeline

o   Second draft narrative – edit, send to DevT for agency review criteria

o   Finalize budget, prepare budget justification

o   Complete Abstract or Project Summary

o   Complete narrative & other sections of proposal -submit to DevT for review

o   Submit narrative for internal and external review from senior colleagues

o   Incorporate review recommendations and prepare **Final Draft**

o   Appendices – provide departmental letters, collaboration letters, institutional support letters (if required) and submit to OTSP RA

o   Final submission review

o   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
  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?