

# Project Charters & Prenups for Scientists

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# Impacts to Full Project Success

When projects do not fully succeed, the problems are often from:

- Unclear goals
- Disagreement about goals
- Scope is unconstrained (too much, too open)
- Disagreement on roles (who does what)
- Inadequate resources/staffing
- Disagreements, resentments, burn out

# Project Success & Collateral Impacts



Projects can be completed in ways that hurt individuals, teams, and team dynamics

Project activities can complete successfully and the projects can still have negative impact or even be an overall negative with the aftermath/exhaust path. For example, post-project handling of publication and attribution can damage reputations and careers.

# Ensuring Optimal Success

- Excellent foundation to build on and extend
  - ▣ Project Development/Management: Mini Grant Program; Culture of Grantsmanship from feasibility meetings to completion; CoLABs
  - ▣ Recognition of success as intellectual merit and broader impacts
  
- Project Charters or Prenups for Scientists
  - ▣ Extending and enhancing our foundation
  - ▣ Supporting our collaborations
  - ▣ Sharing our models and methods across UF

# Project Charters

a.k.a. Project Definition, Project Statement, Science Prenup

Clearly states project scope, objectives, participants, roles, responsibilities, stakeholders, and methods

Uses: project sponsorship/authorization; resource allocations; communication device; baseline for benchmarking throughout the course of the project, for all project activities methods and team dynamics

# Project Charters – Basic

## Basic (Jennifer Vinopaul)

1. Project name
2. Description (high-level statement of your project goal)
3. Success criteria (how will we know when the project is done?) – SMART goals
4. Requirements (deliverables, optionals, & out of scope)
5. Project team (including roles)
6. Milestones/Schedule (high-level + proposed dates)

## One-Pager (Tito Sierra)

1. Project Name
2. Objective Statement
3. Requirements
4. Out of Scope
5. Team
6. Schedule

# Project Charters – Elements

- Project Name
- Objective (scope statement, outcomes, deliverables, audience)
- Team Member Roles and Responsibilities
  - Professionalism, Goodwill (techniques, methods, time box it)
  - Project Administration
- Timing/Schedule and Constraints
- Milestones & Deadlines (Project Plan)
- Deliverables & Dissemination (Data Management Plan)
- Crediting/Attribution
- Future Phases (Out of Scope)
- Financial Arrangements

# Some Considerations

- Tools: Project software (usage is determining factor)
- Techniques: Timeboxing
- Frameworks, MoSCOW method:
  - M - MUST: Requirement that must be satisfied for the project to be considered a success.
  - S - SHOULD: High-priority; should be included if possible. Often critical; can be satisfied in other ways if necessary.
  - C - COULD: Requirement that is desirable, not necessary; included if time and resources allow.
  - W - WON'T: Requirement that stakeholders have agreed will not be implemented in a given project. May be considered for the future.



# Examples of Project Management Software/Tools

All have pros/cons; better/worse for different needs/people. Biggest problem is non-use. If using, pick one and use it. Usage equals success because simply learning project management software (learning new tricks, new software) is a success.

- GatorCloud, <http://www.it.ufl.edu/gatorcloud/>
- Asana, <http://asana.com/>
- Basecamp, <https://basecamp.com/>
- Pivotaltracker, <http://www.pivotaltracker.com/>
- Trello, <https://trello.com/>
- Many others: Sharepoint@UF; Confluence (paid)

# Example Techniques: Timeboxing

Timeboxing for risk management and productivity can be used to limit unproductive discussion and re-focus on moving forward, with a clear process focused on productivity.

Timeboxing can help when work turns to:

- Over-focusing on details
- Theoretical and lengthy debates
- Ranking long lists of items

Timeboxing Technique:

- Set a time limit (e.g., 5 minutes) to discuss concerns
- Make a temporary decision and see if it works

We, the Team, create our project charter.

In our Project Charter,

We, the Team, decide, define, and commit to our project.

We, the Team, decide, define, and commit to our ways of working as individuals and team members for the course of the project and in relation to the project in the future.

# Our Project Charter: Stages

- Discussion
- Write draft
  - ▣ Share draft with full project team
  - ▣ Revisions for consensus
  - ▣ Finalize draft for stakeholders
- Share draft with stakeholders (Chairs and Deans)
  - ▣ Revisions for consensus
  - ▣ Approval of finalized version (scope control)
- Post Project Charter publicly, consult frequently

# Drafting Our Project Charter

- What have we already defined from the grant proposal? Any changes?
- Areas to consider:
  - ▣ Credit & Mentoring Plan for Graduate Student worker
  - ▣ Project Management Software
  - ▣ Techniques (timeboxing); Frameworks (MoSCOW)
- Process for drafting, editing, and finalization
- Finalize the Project Charter by Oct. 1
  - ▣ Finalized for DHLG, for submission to stakeholders
  - ▣ Finalization meeting 10/1, 1-3pm, LW212

# Project Charter Examples

- One Page Example (NCSU, slide 17),  
<http://www.slideshare.net/tsierra/the-projectonepager>
- Medium Complexity Example (Columbia University Libraries, Developing Librarian Project)  
[www.developinglibrarian.org/link-to-google-doc-for-developing-our-charter/](http://www.developinglibrarian.org/link-to-google-doc-for-developing-our-charter/)
- Long, Complex Example (UNT + UF for TRAC)  
<http://ufdc.ufl.edu/AA00024188/00003>

# References & Resources

- Responsible Conduct in Research (Mentoring Plans, Dealing with Conflicts, & More), <http://guides.uflib.ufl.edu/stemrcr>
- Project Management, Dorothea Salo, <http://goo.gl/73AAXs>
- DevDH, <http://devdh.org/>
- Prenuptial Agreements for Scientists: <http://goo.gl/lalxDv>
- Intro to PM, Project Charters, & Project Portfolio Mgmt, Jennifer Vinopaul: <http://goo.gl/JbvWux>
- Library PM Toolkit: <http://goo.gl/pAxWWv>
- Humanities & Lightweight PM (incl. timeboxing), Delphine Khanna: <http://goo.gl/Gz7lve>

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