Learning & Education Advancement Fund (LEAF): Project Management Guidelines

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What is Project Management

A **project** is a *temporary endeavour that is undertaken to create a unique product, service or result* within a specified scope and with targeted outcomes.

Project management is a set of tools and processes to help organize and manage the work required to complete the project. Successful projects typically involve thoughtful planning and documentation of progress. Actively managing a project minimizes uncertainty and increases the likelihood that the project outcomes will be achieved within the anticipated timeframe and budget. As you review the project management tools and processes shared below, remember that you do not need to leverage all the suggested tools and instead focus on those that will be most helpful to you and your project.

Project Planning

Planning the main components of the project before it starts – including the intended outcomes, work involved, timeline, resources and processes, sets the project up for success and helps to ensure that the project team and project stakeholders have a shared understanding of the scope of work and expected outcomes.

Project Outcomes

In planning a project, it can be helpful to start by defining the end goal of the project. What are you trying to accomplish? What will be the ultimate outcome or result? What does success look like? Answering these questions will help you stay focused on the intended outcomes and will be important to maintain scope as you undertake the work.

Project Deliverables, Phases, and Activities

After identifying project outcomes, you might then identify the necessary work to achieve your goal:

1. *What are the project deliverables?* Deliverables are the tangible outcomes of the project, i.e., what you intend to produce through the project.
2. *What are the main phases of the project?* Project phases may be time-based (e.g., year 1, year 2) or aligned to project deliverables (e.g., development of a story-board for an e-module).
3. *Within each phase, what tasks or activities need to be completed?* Outline the necessary tasks involved in each phase of the project.

Focus initially on identifying major tasks while allowing for iterative detailed planning as the project progresses. Projects often evolve over time, particularly with longer term projects (such as 3-year LEAF projects), so it may be more realistic to undertake detailed planning one year at a time.

Project Scope

Project scope includes all of the work that needs to be completed to deliver your project outcomes. While planning your project, it will be critical to identify what is **in scope** and what is **out of scope** for the project. Consider project constraints such as timeline, budget, and resources as well as expectations and input from project sponsors and stakeholders. Keep in mind that without careful consideration, you may add elements that do not help you reach your identified end goal and/or that pose risks to your ability to complete your project on time, in budget and with the resources available. Consider creating a "parking lot" document for interesting ideas that come up but are ultimately out of scope. With an ongoing document, you can ensure you are not losing these ideas and can always return to them in the future.

Project Timeline

Planning a timeline for each project phase, with milestones or checkpoints, can help you track your progress towards deliverables. When considering the timing of milestones, it may help to think backwards from your project end date. Consider mapping out your timeline in a Gantt chart to identify dependencies and milestones. Remember that project planning is not a perfect science, so timelines may shift. However, it is helpful to have them in place and update them as your project begins.

Project Resources

Once you've identified the work/activities required to complete your project, you will need to consider *how* the work will get done. This involves a consideration of the necessary resources – human, physical and financial. Who is responsible for completing the work, and what resources will be required to carry out the work?

As part of your LEAF application, you are required to submit a project budget. If you are hiring personnel, you should consider their respective responsibilities and engage your local HR office to determine appropriate roles and compensation. *Visit the OVPIUE webpage, LEAF Evaluation Criteria & Application Process, to view the budget template and budget guidelines.*

Project Stakeholders

Identifying project stakeholders goes beyond the team members needed to complete the work. A stakeholder is anyone who is impacted by the project even if they are not directly involved in the work. As LEAF funding will conclude after 3 years, you'll need to consider whose buy-in you need to sustain the project outcomes beyond this period such as faculty colleagues or academic leadership in your unit. It is important is to consult and share your project with stakeholders early to ensure you have their buy-in and support for the project.

Examples of key project stakeholders include:
- Academic Unit or Division
- Your unit chair
- The Office of the Vice-Provost, Innovations in Undergraduate Education
- Project partners (including divisional shared-service units that may be supporting aspects of the work)
- Project team
- Faculty colleagues
- Students
- External partners

Academic Unit / Division: Sharing project updates with your division or academic unit will also be helpful as they might be able to connect you with local resources, share broader context /

considerations for your project or consider how your project might be leveraged on a larger scale (e.g., across multiple courses or units).

Faculty / Staff / Students / External Partners: Other stakeholders for your project could include faculty within your unit or division, staff in support units such as educational technology units, libraries and registrars' offices, students in your courses or external partners (e.g., if your project involves experiential learning).

Project Communications

After identifying the project stakeholders, it is helpful to establish the communication channels and frequency of communication needed with each group.

Project Team: Identify how the core project team members (e.g., research assistants, work-study students, project coordinator) will remain connected as the project work progresses. For example, consider creating a Teams or SharePoint site to hold all project documents, having a Teams chat for day-to-day questions, and holding regular project team meetings. The larger the project team is, the more important it is to have clear communication channels.

Other Stakeholders: Consider how frequently you will communicate with your project sponsor and/or divisional contacts to share project updates, challenges and successes. For example, you may consider leveraging existing communication channels, such as your academic unit's monthly meetings, a community of practice or sharing email updates once per term.

Project Documentation

Documenting project plans and progress can feel like an extra step there isn't always time for; however, having a project charter and activity tracker will help ensure all stakeholders have a common understanding of the plan, and you as the project manager will always know how the project is progressing.

Project Charter: As you plan the core details of your project, you'll want to document the high-level decisions made, in the form of a project charter. Essentially the charter serves as a static document that defines the project's purpose, scope and milestones that you can refer to as project progresses. This is particularly helpful for long-term projects where ideas and initiatives might change to respond to project developments. *View our [sample project charter template](.).*

Activity Tracker: Another key project document will be your activity tracker. This is something you – or your project coordinator - can update regularly to monitor the progress of your project. Having the detailed tasks listed in one place will help you keep track of tasks that are complete and upcoming and who is working on what. You can use a project management software such as Microsoft Project or Asana, but Excel can also be effective. Any tool that your team will keep updated is the best tool to choose! *View our [sample activity tracker template](.).*

Managing and Tracking Your Project

As your project work is underway and you are utilizing appropriate communication channels and project tracking documentation to manage your progress, you may want to consider these additional strategies to support you in effectively managing your project:

Team Meetings

If you have key project contributors, you'll want to hold regular team meetings. You can determine the frequency based on your needs, e.g., monthly, weekly or more frequently during periods where a lot of work is happening. You may wish to use the meetings to discuss progress, solve problems, identify short term-action items and iteratively plan tasks for future work. You should create a clear, specific agenda for each meeting and document important items such as decisions and action items. *View our [sample meeting log template](#) which you can use to plan and keep track of team meetings.*

Time Management

As the project lead, you may complete much of the work yourself, so it is important to maintain a time-management system to keep the project on track. Examples include keeping a running to-do list, setting reminders or deadlines and blocking time in your calendar for time-intensive tasks.

Monitoring Progress

Inevitably, no amount of planning can make your project go perfectly. Every project goes off track and that does not mean it failed. Utilizing these project management tools and processes should help you help to maintain focused on the core aspects of the project and allow you to recognize when the project is off track sooner. When things change or if you are concerned about your progress, reach out to the OVPIUE team. We are always happy to discuss adjusting your LEAF timelines or budget. *Contact vp.iue@utoronto.ca to discuss your LEAF project with our team.*

Completing Your Project

Sustainability

Sustainability is a core tenet of LEAF and an aspect that the committee considers in the evaluation of all proposals. It is important to consider what will happen once LEAF funding is over. As you consider the completion of your project, it will be important to address:

- How will you share your project outcomes, be they modules, resources, novel approaches to curriculum renewal or innovative teaching practices, with the broader U of T community?
- How will you ensure that the project outcomes will continue to have an impact following the support of LEAF? Consider what aspects of your project will shift into being part of regular or ongoing work and how those will be maintained post-funding.

For those funded for Seed grants, a potential next step might be to apply for an Impact grant. If this is the case, considering this future step as a goal of the project can be helpful as you think about assessment strategies and how your initiative could be expanded with an additional influx of funding. *Visit the OVPIUE webpage, [LEAF Evaluation Criteria & Application Process](), to view the assessment guidelines.*

Minimum Viable Product

It is rare for projects to produce the perfect product, outcome or result in the first iteration. It can be tempting to constantly revise as you think of new or expanded ideas. Try not to let the idea of perfection stop you from moving forward and completing your project. As you move through your project, consider what is the minimum viable product to hit your project goals and outcomes and remember that there will be room to improve and iterate in the future.

Good luck with your project(s) and keep in touch!