Project management

What's involved in managing a collaborative project?
If you are aiming to set up cross institutional Action Learning an intrinsic success factor will be the approach taken to managing the project. The following guidelines can be used to support this process.

Agree the Aims and Objectives
Before you embark on the project, consider what you are hoping to achieve and what you would hope to report as being a successful outcome. This might include tangible measures such as number of promotions, number of those reporting a change in working practice, number of university sponsors observing a difference. Although evaluation could be planned at a programme level to take account of these metrics, it would be more realistic to collect and assess the data at each participating institution. You may decide to wait up to 12 months after the end of the programme for this type of data to become available. Other measures, both tangible and intangible, such as number of participants completing the programme; reported personal value gained; reported value observed by facilitators can be carried out at programme level. See here for evaluation questions to ask participants and facilitators.

When taking an approach where you commence with the outcome in mind it is beneficial to consider the following three areas:

1 Purpose:
•What are the desired objectives or outcomes?
•How will you know they are being achieved?

2 Stakeholders:
Identify the stakeholders and determine what each will want from the programme and what you will need each of them to contribute. Your stakeholders will include:
•Set members
•Organisers
•Facilitators
•Sponsors

3 Style:
With the purpose and stakeholders in mind, what is the appropriate style?

•What kind of set (purpose, scope, composition) would satisfy the needs of the stakeholders?
•What sort of interactions within the set would make the investment of time and effort worthwhile?
•What level of facilitation is needed?
•Will the proposed set attract sufficient support from the organisation
•Will people be willing to join it?

Before enlisting support, be ready to answer (or agree together) the following questions:
•What are the objectives of the programme?
•Who might be available to facilitate it and will there be a cost?
•What commitment is needed from set members?
•How will you select set members to joint the programme?
•How will effectiveness of the programme be evaluated?

Encourage those running the programme, and those joining the programme, to think about their reasons and their success criteria for participation; the more specific the criteria, the better.

Ensure that outcomes of set members are aligned with the outcomes of the set, so there is no tension between what the members want and what the sponsor wants.

To assess the ultimate value of the Action Learning, look at the impact on individuals and on the organisation as a whole.

Formulate a Project Team
It is recommended that each participating university is represented on the Project Team. Their role will be to promote the Action Learning programme, participate in project meetings, facilitate action learning set meetings, host set meetings, act as set facilitator, promote and organise programme evaluation, contribute to content for web site and any developmental input for facilitator or Action Learning Set members.

Appoint a Project Lead
The role of the Project Lead is to champion the aims and objectives of the programme through appropriate

communications and action; ensure consistency in facilitation and use of Action Learning methodology; act as the central point of communication for facilitators and set members; arrange and chair project team meetings; ensure smooth arrangements for hosting of action learning set meetings; and implement an evaluation strategy.

The first task of the project lead, with project team members' support, will to be develop a project plan.

Develop a Project Plan
This serves as a document to identify the purpose, intended outcomes, roles and responsibilities and timescales and risks. It can also be used to present a case to decision makers in prospective participating institutions. The plan should include: project timescales; communications strategy; stakeholder involvement; facilitator development arrangements; meeting hosting arrangements and evaluation approach.

Prepare a Gannt Chart
A Gannt Chart is a useful tool to help provide a visual overview of timeline and responsibilities for the project tasks.

Set up a Communications Portal
An independently hosted communications portal is recommended for your project as this creates a one-stop shop without the need to access a specific university server. This will minimise restrictions associated with fire wall security and intranet access and allows editing and maintenance by members of the project team.

Weebly (www.weebly.com) is an example of a free online web creation tool that can be used to develop a communications portal. It is easy to use for those with little technical knowledge.

The project team members, set facilitators and set members will appreciate knowing exactly what they are expected to do and have the tools and resources to support them. Therefore, as a minimum requirement for the portal would be the inclusion of:

• The Programme Aims and Objectives
• A method by which prospective set members are able to enrol on the programme
• Preparing for Action Learning and Reflecting on Action Learning templates for set members
• Dates, times, venue and location details for each set meeting
• List of set members (if this can be provided in a secure area)
• Facilitator contact details
• A method by which set members and facilitators are able to evaluate the effectiveness of the programme
• Any resources that will support project team or set members participate effectively.

Provide Facilitator Training
It is useful to provide facilitator training for all facilitators, especially those who are new to the process. This will encourage consistency and create a shared understanding of what the programme is aiming to achieve. It will also enable rotation of facilitators or cover if the scheduled set facilitator becomes unavailable.

Organise Set Meetings in advance
It is recommended that between 4 – 6 action learning set meetings are scheduled. Facilitators from each university will need to agree target audience, numbers, approach, communications and timeline and a review and evaluation meeting for the project.

Promote the Programme
The programme will need to be promoted to prospective action learning set members. An example of an email can be downloaded from our website www.actionlearn.weebly.com.

Select the Set Members
Once the closing date has passed, selection of successful action learning set members will need to be undertaken by the project team. You will need to decide how many set members you are able to accommodate for the programme. We were fortunate that we received the exact number of applications that we were hoping to receive but we had intended to select on a first come first served criteria.

Send out Joining Instructions
Prospective applicants can then be sent joining instructions.

Remind Set Members of Forthcoming Set Meeting
Prompt programme participants that they have a set meeting coming up, provide a link to the date, time and venue location on the web site and request that they prepare for the meeting by completing a downloadable template "preparing for a set meeting".
(see www.actionlearn.weebly.com)

Launch the Programme
Introduce all participants to the programme, outline the importance of and examples of ground rules, explain the Action Learning approach chosen, how the programme will be structured, the role of the facilitator and presenter, expectations of set members and how the programme will be evaluated.

Evaluate the Programme
On completion of the programme request that both facilitators and set members complete an evaluation form. An example evaluation form can be downloaded from www.actionlearn.weebly.com.

Share the results of the evaluation
Circulate the results of the evaluation to the project team to enable them to report back to their respective institutions.

Hold a Programme Review Meeting
This meeting will serve to provide an opportunity for all those involved in delivery to discuss the effectiveness of the programme, assess the results of the evaluation, and decide on next steps.