



PROJECT MANAGEMENT



INTRODUCTION



LEARNING OBJECTIVES

As a result of this module, participants will:

- Define the nature of a project.
- Practice selecting a project.
- Utilize appropriate terminology.



Defining a Project

Venturing is characterized as a program designed for older youth to grow in experience in the areas of adventure, leadership, personal growth, and service. As a part of this, Venturers are often asked to provide leadership for an adventurous event or a service-related activity at some point during their Venturing journey. In order to ensure the activity will be successful, it is important to utilize proper project management techniques.

Project management is the application of skills, knowledge, and resources to accomplish a task or complete a goal. A project does not need to be permanent, and could be as small as organizing a local food drive or assisting with the promotion of a camp out. Inversely, a project can be very large and consist of dozens of volunteers investing a significant amount of time to ensure its success.

This training will prepare Venturers to identify, plan, and execute projects in an efficient manner, while encouraging personal growth and development. Throughout this course, there will be opportunities to reflect on content, apply learned skills through activities, and discuss alternate methods of accomplishing goals, with the goal of ensuring that participants are able to apply their knowledge to a diverse array of situations.



What is a Project?

- What is a project? What is not a project?
- What have been some examples of projects that you have worked on?
- What makes a project successful?
- Why do you think that there is no clear definition of what constitutes a project?
- How can a project impact individuals?
Communities?
- When is it acceptable to say that a project is completed or done?



Possible answers....

- A project can be any event, activity, structure, or process that benefits a person or group of people.
- A project is guided by a set of goals, and is inspired by a perceived need or a passion.
- A project is not necessarily permanent, however, it must be “durable”, meaning that it must last for its defined period of existence in a sustainable manner.
- In the abstract sense, a project must have a beginning and an end, in addition to yielding distinct or unique products. These products may be tangible or intangible.
- A project can be considered successful if it accomplishes its stated goals.
- A project can impact an individual by providing a tangible benefit, such as a physical good or product, or by providing a positive experience, such as the feeling of having helped out those less fortunate than you.
- Likewise, a project can benefit a community by providing an opportunity to unite the community behind an idea or passion, as well as through a tangible good or product.



Terms

- **Project Manager:** Person in charge of the project. They are the driving force behind the planning, implementation, and personnel coordination throughout the project.
- **Stakeholder:** Person who has an interest in the project; they are directly impacted by the results and care about how the project is completed.
- **Sponsor:** Person who pays for the project, or is the primary donor of material resources.
- **Team Members:** Those who help with the implementation of the project.
- **Vendor/Third Party:** Outside entity providing a product or service to be used in the project.
- **Beneficiary:** the primary person who benefits from the completion project.
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Guidelines for Selecting a Projects

- The purpose of the project. Objectives or goals you would like to achieve?
- After, consider more specific projects that will fit that need.
- Allows the guidelines for being a true project. In the abstract sense, your project must have a beginning and an end,
- At a later point, you will craft a project scope statement, which will solidify this project concept into a defined, achievable plan.



Team Activity

Break up into small groups

Groups will come up with a hypothetical super project theme to use during this training

Examples:

- planning a certain “Tier III” Venturing super activity
- planning a service project for their chartering organization
- starting a council Venturing Officers’ Association

Discussion: **Why it qualifies as a project.**

- what impact their project will have and why that is a needed aspect
- discuss which persons/organizations would fall into each of the project roles (beneficiary, sponsor, stakeholders, possible vendors, etc.).

Each team should then briefly present what they have discussed



Review

What is the definition of a project?

What qualifies as a project?

Who is responsible for the execution of a project?



PLANNING



LEARNING OBJECTIVES

As a result of this module, participants will:
Explain the value of documenting service hours.

- Apply the Planning Process.
- Explain the process of forming a project budget.
- Practice planning skills in a project context.



Logging Hours

Documenting your project is very important.

The foremost reasons for documenting any process

- reduces confusion
- allows you to quantify the effort required for a specific task
- act as the database of organizational knowledge throughout the duration of the project
- stored information can be accessed in the future by others

Logged hours can be used for:

The core Venturing awards: service hours are required for the Discovery, Pathfinder, and Summit Awards. These service hours should be tracked by the individual Venturers as they progress through the recognition system.

Journey to Excellence: these hours can be entered by a representative of the crew (usually the advisor or president) at <http://www.scouting.org/scoutsource/Awards/JourneyToExcellence>.

Messengers of Peace: this international program tracks service projects around the globe (<http://www.scouting.org/messengersofpeace.aspx>).

Future projects: others looking to plan similar projects in the future can use your records as a resource or aid when planning their own project.

When logging hours, Venturers will need the following information:

- Basic project description.
- Date of the project.
- Number of people participating (may be broken down into categories of Scouts vs. non-Scouts, youth vs. adults).
- Total hours worked.



Planning Process Steps

Define the Activity.

Define Resources

Consider Alternatives

Commit to Writing

Promote the Plan



Scope Statements

The final scope statement should include:

- The primary objective of the project: what need are you trying to fulfill, or what problem are you trying to solve?
 - The benefits of and justification for completing the project.
 - The project scope; state which exact tasks will be included in the project
 - (remember to keep your goals “SMART”).
- Two example scope statements can be found in Appendix A.



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- Two example scope statements can be found in Appendix A.



Scope Statements

Appendix A” Example Scope Statement 1



Scope Statements

Appendix A” Example Scope Statement 2



Team Activity

The purpose of this activity is for participants to understand that all parties of a project should have the same information in order to be active and productive members of the team.

Present each participant with a copy of **Framework Activity Page 1 (Appendix B)** face down.



Team Activity

Appendix B: Framework Activity Page 1

Locate each number in order (i.e. 1, then 2, then 3, etc.). I will give you 30 seconds to complete this task.



Team Activity

Questions???

Let's do it again!

And again!

There is a pattern!
Can't you see it?



Team Activity

Appendix B: Framework Activity Page 2



Team Activity

“How did you not see that?
Aren't we all looking at the same page?”

Let's do the activity again!



Budgeting

There are two possible ways to approach creating a budget that will we discuss:

1. Top-down approach
2. Bottom-up approach

Both methods have advantages and disadvantages..

There are also multiple types of costs that need to be taken into account.

1. one-time costs
2. recurring costs



Budgeting

Time to formalize your thoughts.

1. Begin by creating a written list of each project task/component, making it as comprehensive as possible. A spreadsheet may be useful in organizing your thoughts, or dividing items into categories.
2. Next, go through the list and assign a cost to each individual item; depending on the approach you use (top-down or bottom-up), either begin with the total budget and divide it up, or begin by estimating each item and adding them together. Don't forget to add in any sales tax or other taxes that are not already included in your individual item estimates. Keep in mind that some items may not have a direct cost.
3. It may be helpful to add in some "leeway" to your total budget, to compensate in the case that an item/task ends up going over the cost that you originally estimated. This can be done by adding in a certain dollar amount or percentage to the total budget.



Budgeting

Appendix C: Example Budget 1 & 2



Team Activity

Break out into your teams

The **objective** of this scenario is for each group to determine a registration fee for a sample event given certain information about event expenses.

The scenario:

- Imagine that your Venturing crew has volunteered to run a week of day camp for Cub Scouts in your district.
- The maximum number of participants is 120.
- A program area of a local state park has been booked to use as the location of the day camp. In this area, you are provided with a building – the park’s nature and ecology educational center – two pavilions, and an activity field. The cost for the week is \$1,100. You have the space from 8am to 5pm each day of the week.
- Scouts will be able to get to use the park’s pool for one day during the week, but at a cost of \$10 per Scout.
- Scouts will bring their own lunch each day. Activity equipment will be borrowed from the park at no cost.
- The theme for the week is Planes, Trains, and Automobiles. On Thursday during the week, you’ve arranged, through a friend who is a doctor, to have a local life flight crew land a helicopter in the activity field. Scouts will get to explore the helicopter and learn about life flight operations. The crew requires \$500 to cover expenses.



Team Activity

Discussion

- What information in the scenario was necessary to determine your final registration fee? What information was not necessary?
- What tools could be helpful when trying to calculate the fee to charge?
- If you did not know the exact amount of an expense you expected to incur at this event, how would you go about making your best projection or estimate for that expense?
- If you did not meet your expected number of 120 participants, how would this budget change?
- Where could your crew turn if it needed more money to make this event happen?
- Your budget represents a plan. How can you be sure that your crew is sticking to its plan while the event is actually being carried out?



Team Activity

Income			
Item	Income per Scout	Scouts	Total
Registration Fee	\$ 30.25	120	\$ 3,630.00
Stipend			\$ 250.00
Total Income			\$ 3,880.00

Expenses			
Item	Expense per Scout	Scouts	Total
Pool Fee	\$ 10.00	120	\$ 1,200.00
Facility			\$ 1,100.00
Life Flight Program			\$ 500.00
Mailing and Printing			\$ 80.00
Total Expenses			\$ 2,880.00

Net Profit			\$ 1,000.00
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A Project Plan

The project plan is a set of living documents that provide a roadmap for the project; the original course is set by the project manager, but it can be expected to change or adapt over the life of the project as new challenges or complications arise.

The plan should gather together the scope statement, timeline, and total budget. It will then be used throughout the course of the execution of the project to determine whether or not it is still on track for completion.



Assembling a project plan can be difficult with a very complex project. A tool that can simplify this, however, is the Summit Award workbook; even if the project is not a Summit Award project, there are a number of tools in the workbook that are useful to all projects. The workbook can be downloaded from venturing.org/summit-award.html, and contains tools for budgeting, goal setting, and more.



A Project Plan

This plan can either be **formal or informal**, depending on the nature of the project.

In the case of a **smaller scale project**, such as planning an evening outing for your crew, the **project plan may simply be an informational email** sent to all those involved.

However, **larger scale projects** require more complex plans; these plans may be required to receive certain approvals before execution can begin, such as in the case of a Summit Award project. **Approvals may be needed** from the beneficiary, sponsor, or stakeholders, and may consist of **reviewing the budget, specific job components, or recruiting certain members to the team**.

It is also necessary to determine who needs to be kept informed throughout the next stages of the project.

Once you have completed your project plan and gathered all necessary approvals, it is time to start building up your team and getting the implementation of the project off of the ground!



Review

What are the steps of the planning process?

Why should a project manager track service hours?

How do project managers create a budget?



MANAGING RESOURCES AND PEOPLE



LEARNING OBJECTIVES

As a result of this module, participants will:

- Explain how to acquire resources for their projects.
- Discuss how to motivate a team.
- Practice good communication skills.



Sourcing Materials

- A **material** can be defined as any item or resource, tangible or intangible, which can be used to help accomplish the goals of the project. During the planning process, you should have determined what resources could be provided by your sponsor, beneficiary, and stakeholders. However, if there are resources that they are unable to provide, you will have to determine other means to gather the materials.
- The process of researching and collecting materials is known as “**sourcing**”. Once material needs have been identified in the planning process, the project manager should determine appropriate methods for acquiring those materials.
- Regardless of the relative complexity, there are several considerations to be aware of during the process of sourcing your materials:
 - **Cost of the Materials:** is there a cheaper option available?
 - **Location of the Materials:** is there an option that is more convenient to acquire?
 - **Production Conditions:** is the material produced according to a code of ethics?
 - **Material Sustainability:** will this material last the duration of the project?

“Measure twice, cut once”



Handling Donations

A project manager may determine that certain materials could be acquired through donation. The following steps should be taken when attempting to solicit donations for your project:

- **Determine the reason for soliciting donations.** Is it financially beneficial? Is it for convenience?
- **Determine the best method for communicating.** Tailor your communications to your audience; what demographics are you targeting? Consider the forms of communication that are most effective when contacting that particular age and profession.
- **Identify and reach out to potential donors.** Make of list of people to contact, and then contact them using the appropriate method determined in the previous step.
- **Collect donations.** Collect donations as they are made available to you; it is important to keep an organized log of all donations received.
- **Follow through with donors.** Thank donors for their contributions to your project, and specify how their assistance has helped contribute to the project. Return any materials that were donated to you as a loan.



Handling Donations

Fundraising applications, which can be found in the Summit Award workbook on venturing.org/summit-award.html, should be used if a Venturer is soliciting donations for money or materials to fund their project. This application is required for Summit projects that use fundraising, however, it is recommended that any project that will be fundraising use this form to clarify the scope of their efforts.

Not all resources are physical materials, however; recall that a resource may be tangible or intangible, such as knowledge or skills necessary to accomplish a project's goals.



Team Dynamics

Working with a team can often make a project easier to implement and plan. The relationship of these supporting people to the project may involve a high level of commitment or investment, such as financial supporters or those who have given significant time to the project's success.

Common motivations may be:

- **Recognition:** volunteers want to be recognized for the work that they've done.
- **Giving Back:** volunteers may be motivated by the knowledge that they're making a positive contribution to society.
- **Responsibility:** volunteers may feel a sense of obligation to complete a project.

Once these motivations are identified, be sure to target specific actions or rewards to provide your team members.



Team Dynamics

Get into your small teams

- Brainstorm what traits make someone a good manager of people and list them out.
- Then considered them as a whole group.

Discuss:

- Good communication
- Well organized
- Knowledgeable about the project
- Team player
- Hardworking
- Adaptive or flexible

The dynamics of a team can often seem complex; however, an understanding of motivations can clarify many conflicts.

Conflicting motivations of team members can make managing the team difficult; the manager should actively work to be aware of any potential conflicts that may arise.



Team Activity

Within each team, have the participant that has been a noticeable leader of the become a silent observer.

Added previously unknown challenge to their plan.

Without the aid of their previous leader, have each team resolve the new conflict and report on their results and process to another team.



Team Activity



The Stages of Team Development is a model to explain the changing dynamics of a team as new members or more information is added to the group. The four stages are: **Forming** (High Enthusiasm/Low Skill), **Storming** (Low Enthusiasm/Low Skill), **Norming** (Rising Enthusiasm/Rising Skill) and **Performing** (High Enthusiasm/High Skill).

The Leading EDGE model applies the instructional EDGE practices to the Stages of Team Development to facilitate the growth of new leaders. Each component of the EDGE model aligns with a stage of team development: **Explain** - Forming, **Demonstrate** - Storming, **Guide** - Norming, **Enable** - Performing. By varying the level of support given to each team, a leader is able to foster new leadership in a healthy way.



Communicating with Your Team

A crucial element of managing any team is the ability to express the goals of the project in a manner that is understandable to the team, the beneficiary, and any stakeholders.

Communication may take a variety of forms, both written and verbal, as well as both analog and electronic.

Written Communication

Verbal Communication

Electronic Communication



Diverse Team

In the course of planning and implementing a project, there will likely be times when the project manager must interact with key stakeholders, beneficiaries, or team members that may not communicate the same way as them. In these circumstances, it is crucial for the project manager to adapt their method of communication to their audience, ensuring that their information remains clear, relevant, and accessible to all.

For example.....



Team Activity



Review

Should donations be handled differently than other materials?

What leadership model can assist in supervising a team?
How can a team be motivated?

When is electronic communication inappropriate for a project?



IMPLEMENTATION



LEARNING OBJECTIVES

As a result of this module, participants will:

- Practice setting timelines for a project.
- Explain functions of a project manager during the implementation stage of a project.



Following Established Timelines

The implementation stage of a project, brings new challenges for the manager.

In the planning stages of a project, timelines should be determined to ensure that a project can be delivered in a timely manner according to the wishes of the beneficiary.

When it becomes necessary to adapt or alter a project timeline, the project manager should use this process.

Identify what has changed from the original timeline up to the moment.

Prioritize obstacles to the project to ensure that a timeline isn't changed unnecessarily.

Consider Alternatives that were written down in the Planning Process.

Get Feedback on the changes to the timeline from the project's team.

Change the Timeline by writing out the new timeline and sharing it with the team.



Following Established Timelines

- What is the specific activity or task that must be accomplished?
- Who will be accomplishing this task? Will they need support?
- When will this need to be accomplished, relative to the rest of the project?
- What can be done if the individual is unavailable, or the timing is incorrect?
- How will the team be informed of these plans?



Team Activity

- Assign a new member to serve as the group leader.
- Pass out sticky notes so that each individual team member has several. Explain to the that this activity will involve them outlining each step of their project and determining the timeline to be able to accomplish it.
- Have the leader for this activity, on their own, write each step of their project on their sticky notes (one task per note). All of the other team members should individually do the same. Once each member has finished their list, ask them to share how many steps they had thought of.
- Discuss as a large group how allowing everyone to contribute ideas might develop a more in depth or broad timeline for their project completion.
- Now that each member has developed their own timelines, have the team leader collect all the sticky notes from their group members, and stick them on the wall or a flat surface. Have the team discuss each note, and collaboratively decide which order they should go in.



Team Activity

Debrief:

- How can others impact your specific project timeline?
- What happened during the planning process?
- When planning a project what is easier, working alone or asking the
- group to contribute?
- Is it important to outline your project and go step by step until
- completion?
- As the project leader after this exercise, what would you START doing,
- STOP doing, and CONTINUE to do?



Executing a Project Plan

- The project manager should arrive early (before any of the team members) to ensure that the project resources are present or en-route, as well as to determine the conditions of the work space.
- Following the arrival of the team, the manager should reiterate the goal(s) of the project to the team, and seek to motivate them if necessary.
- During the implementation process, the manager should be accessible by the team, and should participate in the process to encourage the team.



Executing a Project Plan

Other functions during this time may include:

Supervising project timelines: The manager should keep the project advancing according to schedule, and modifying any timelines that may not agree with the circumstances of the implementation.

Motivating the team: The manager should seek to prevent the team from becoming discouraged during the implementation of the project.

Assisting with the implementation: If the manager is available, they should assist with the implementation of the project.

Delegating tasks to the team: The project manager doesn't, and shouldn't, need to make all decisions regarding the project's implementation. A good project manager will recognize that knowledgeable members of the team may be able to make more informed decisions, and will empower them to do so.



Review

What roles should a project manager take on during the implementation of a project?

When should a project timeline be set?

Are project timelines permanent, or can they be changed? How and when should this occur?



FOLLOW THROUGH



LEARNING OBJECTIVES

As a result of this module, participants will:

- Explain project sustainability and how it relates to ethics.
- Explain the importance and process of conducting a team reflection.
- Discuss the reporting requirements of projects.



Post Project

Following the completion of a project's goals, it is necessary to "tie up loose ends" by engaging in follow-up activities. These serve to foster the possibility of future engagement with the beneficiary, as well as ensuring that the project is truly finished according to the original scope statement.

It is the responsibility of the project manager to personally follow through on the project, taking the time to express appreciation to the team and concluding any final business of presenting the project to the beneficiary.



Sustainability

A project manager should always be conscious of any unintended impacts of their projects, especially if there is potential for environmental disruption. Minimizing the disruption of the environment, whether through careful sourcing of materials to minimize impact or through altering work methods to avoid disturb the project's surrounding environment, should be thought of far in advance of a project's completion.

There is, however, another type of sustainability in reference to projects. The sustainability of a project can also be whether it will be able to last for its planned duration or how it will be maintained into the future. This type of sustainability is directly linked to the planning stages of the project management process, again illustrating how the project manager is a crucial figure in ensuring that the project is carried out, both now and in the future.



Creating a Sustainability Plan

When a project manager is generating a sustainability plan, they should consider some of these questions.

- What is the expected duration of the project?
- How long after that duration is it acceptable for the project to persist?
- Who is responsible for maintaining the project up to its expected duration?
- How will the project be maintained up to its expected duration?
- Are the resources for maintenance available and accessible through its expected duration?



Creating a Sustainability Plan

Appendix D Example Sustainability Plan



Discussion

Facilitate a discussion with participants on the merits of having a sustainability plan. This can be extended into an examination of the ethical responsibilities of serving as a project manager, as well as a discussion of what sustainability looks like to them.

The following topics or ideas are possible results of this discussion:

- Having a sustainability plan means that future stakeholders or beneficiaries can enjoy the project.
- A sustainability plan allows for greater delegation on the part of the project manager.
- A project manager, in bringing their vision to life, may be ethically encouraged to make it last for the greater good of the community.
- Sustainability means maintaining any permanent structures or features of a project.
- Sustainability also means having a success plan in place for replacing stewards of the project.



Debriefing

Gather the team: The project manager should bring the team together in a neutral location, where there is a positive or upbeat atmosphere.

Ask for impressions: Starting the conversation off with impressions will provide the project manager with information about how the team is feeling, which can inform the direction of any future questions.

Ask for feedback: The project manager should ask for any feedback that the team may have to improve future projects, both those that are similar to the completed project or any others.

Ask for positive actions: The project manager should ask the team for instances where team members were doing good work and deserved recognition. This could also be substituted for the project manager recognizing positive behaviors or individuals.

Thank the team: The project manager should wrap up the reflection by thanking the team for their assistance in implementing the project, as well as thanking them for providing honest feedback to improve future projects.

Celebrate the implementation: The team should celebrate the completion of the project.



Reporting Requirements

At the conclusion of the project, however, there can be additional reporting requirements in addition to those to record service hours. These requirements may take many forms, ultimately depending on the beneficiary. There are some beneficiaries that may ask for a final report or presentation on the project, listing information on the project's impact, reach, and operation. There are other beneficiaries that may not require something as formal as a presentation, but will instead ask for the project manager to have a conversation with the beneficiary to discuss the process of completing the project.

This report or conversation can be a great time to share what the project manager learned in the team debriefing, and possibly contribute to a future relationship with that same beneficiary. This would also be the time to complete any paperwork required to submit the project to the beneficiary.



Discussion

Facilitate the presentation of each group's project, timelines, sustainability plans, and other materials to the class. Each group should receive no more than 3 minutes to present their idea to the class, acting as though the class is the beneficiary receiving a report.

Following each presentation, the class may be allowed to ask questions of the presenting group to understand the reasoning behind their project choices throughout the training.



Review

What is a sustainability plan? What does it look like?

When should a team debriefing or reflection occur?

Why are reflections important?

Why should project managers be prepared to report on their project?



CONCLUSION



LEARNING OBJECTIVES

Review course objectives:

- Define common project management terminology.
- Explain what a project is, and how to organize one.
- Apply project management skills in a Scouting situation.
- Interpret team dynamics to further the aims of a project.
- Design budgets and timelines that support the goals of a project.
- Explain the necessary processes to accomplish a project successfully.
- Explain the value of sustainability in the project management process.
- Explain the value in collecting feedback to improve future projects.



Course Closure

The word “project” can have different meanings to different people, however there is one common thread that connects all definitions and understanding: passion and a desire to accomplish one’s goals.

The Venturing program is uniquely suited to align the passions of our members to the needs of communities throughout the country. Those members that desire to make an impact on the world are able to do so through the project management process.



Closing Discussion

Have each team of participants share the most impactful lesson they took from the training, allowing approximately 3-5 minutes for each team to discuss and decide upon their lesson. Following this time, have each team present their topic to the large group, and take note of topics that were not discussed by any team.

