



Planning and Executing a Partnership Project

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McMaster Institute for
Innovation & Excellence
in Teaching & Learning

Overview

- Project planning & goal setting
- Establishing expectations, roles & responsibilities
- Identifying indicators of success
- Managing unexpected setbacks & contingency planning



Effective Planning

$$EP = Q * A$$

EP = effective planning

Q = quality

A = acceptability

“Failing to plan is planning to fail!”



Planning Concepts

- Those affected should be involved
- Realistic goals and tasks
- Always improve on the past
- Alternatives are always available
- Work in a team
- Plan, act, monitor, and re-plan continuously



Questions to Ask

- Who or what initiated the project?
- Why is this project being done?
- Who are the project stakeholders?
 - Also consider the scope of the project
- What benefits will this project produce?
- What types of deliverables are expected?
- What are existing constraints?



Establishing Project Goals

- Specific
- Measureable
- Attainable
- Realistic
- Time-based



Further Planning

- Define the major categories of work that must be undertaken
- Develop a project strategy or plan
 - Relate tasks and decisions to each other
 - Flowchart or network
 - Estimate time required for each task
 - Calculate probable completion dates

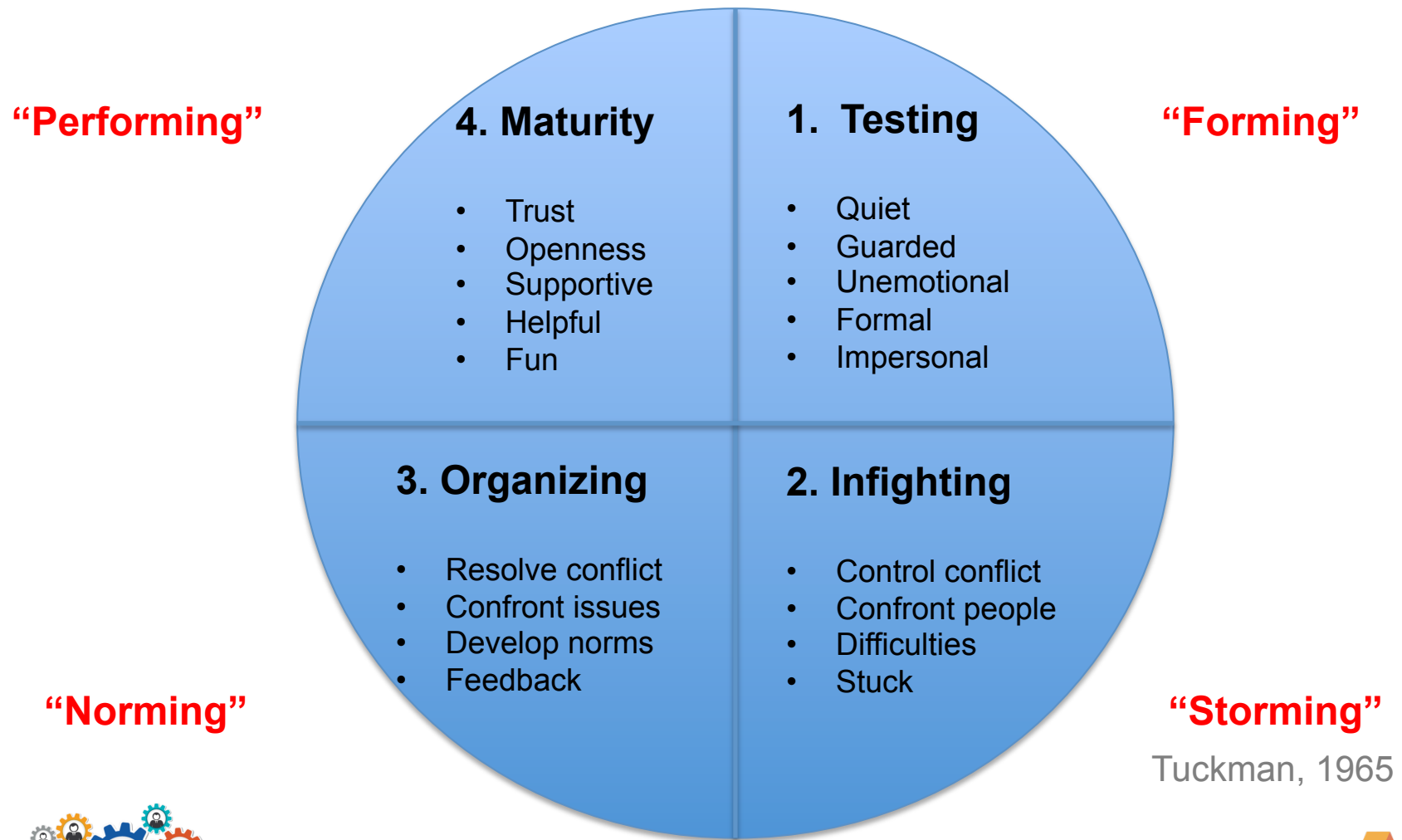


Establishing Expectations

- Determine what it is that you need to accomplish as part of the project
- Establish who within the partnership has existing skills or abilities
 - Also an opportunity for skill growth and development
- Determine the time commitment that each member can contribute



Stages of Team Development



Responsibility Charting

- Develop a chart to indicate specific responsibilities and actions to be carried out

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Responsibility Charting...cont'd

Activity	Partner 1	Partner 2	Partner 3

A – Approve
R – Responsible
C – Consulted
I – Informed

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Roles

- **R** – Responsible
 - The “do-er”
- **C** – Consulted
 - In the loop, feedback
- **I** – Informed
 - Notified after decisions are made
- **A** – Approve
 - Sign off, accountability

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Workshop Development

Activity	Anita	Kris	Mick
Planning meetings			
Outline presentation			
Develop slide template			
Research content and add to slides			
Review slides			
Prepare handouts			
Practice presentation			

A – Approve
R – Responsible
C – Consulted
I – Informed



Workshop Development...cont'd

Activity	Anita	Kris	Mick
Planning meetings	R	R	I
Outline presentation	R	R	C
Develop slide template	C	R	I
Research content and add to slides	R	R	I
Review slides	R	R	C
Prepare handouts	R	R	I
Practice presentation	R	R	A

A – Approve
R – Responsible
C – Consulted
I – Informed



Workshop Development...cont'd

Activity	Anita	Kris	Mick
Planning meetings	R	I	I
Outline presentation	R	R	C
Develop slide template	C	R	I
Research content and add to slides	R	R	I
Review slides	R	R	C
Prepare handouts	R	C	I
Practice presentation	R	R	A

A – Approve
R – Responsible
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I – Informed



Workshop Development...cont'd

Activity	Anita	Kris	Mick
Planning meetings	R	R	I
Outline presentation	R	R	C
Develop slide template	R	R	I
Research content and add to slides	R	R	I
Review slides	R	R	I
Prepare handouts	R	R	I
Practice presentation	R	R	I

A – Approve
R – Responsible
C – Consulted
I – Informed



Workshop Development...cont'd

Activity	Anita	Kris	Mick
Planning meetings	RRR	R I R	I I I
Outline presentation	RRR	RRR	CCC
Develop slide template	RCR	RRR	I I I
Research content and add to slides	RRR	RRR	I I I
Review slides	RRR	RRR	CCI
Prepare handouts	RRR	RCR	I I I
Practice presentation	RRR	RRR	AAI

A – Approve
R – Responsible
C – Consulted
I – Informed



Workshop Development...cont'd

Activity	Anita	Kris	Mick
Planning meetings	RRR	RIR	III
Outline presentation	RRR	RRR	CCC
Develop slide template	RCR	RRR	III
Research content and add to slides	RRR	RRR	III
Review slides	RRR	RRR	CCI
Prepare handouts	RRR	RCR	III
Practice presentation	RRR	RRR	AAI

A – Approve
R – Responsible
C – Consulted
I – Informed



Benefits of Responsibility Charting

- Assist teams in charting responsibilities consistently
- Assist the implementation of tasks
- Clarify individuals' roles
- Eliminate misunderstandings, duplication of effort
- Encourage team-working
- Improve communication

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Identifying Success Indicators

- Document how the success of the project will be measured and identify what you want to work towards
- **Brainstorm:** What are some potential success indicators for your project?



Examples of Indicators

- Meeting schedule as planned
- Staying within the budget allocated
- Learning/experience
- Team/stakeholder/sponsor satisfaction
- Measurable outputs: e.g., publications, presentations, etc.



Cel

- Have tear that each
- Provide a member

Anita

What your team values about YOU:

- How you share authentically regarding your opinions, thoughts, and perceptions about the work we do together
- Your research skills, perseverance, drive, and ambition
- How motivated and well spoken you are, and having someone so involved in the field to work with (even if you question yourself!)
- Your knowledge and kindness

Thank you for being a part of our team. 😊

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Unexpected Setbacks

- **Brainstorm:** What might be some unexpected setbacks?



Contingency Planning

- Time
- Funding
- Technology
- Human resources



Steps in Risk Management

- Identify the risks
- (Quantify the risks)
- Problem solve
- Monitor the risks on a regular basis



Risk Clarification Activity

- **Individually**, without discussion, write down the three or four factors that exist now (or could exist) that you believe could prevent success
 - Can be anything!
- **As a team**, list the factors or concerns on a flipchart, taking one from each person until all are listed
 - Not necessary to repeat the same item



Risk Clarification Activity...cont'd

- **Individually**, without discussion, select the three or four factors that you believe would have the greatest impact on the project's success
 - Don't worry about whether or not they can be resolved at this stage
- **As a team**, place check marks beside each person's choices and then circle the three or four items with the greatest number of checks

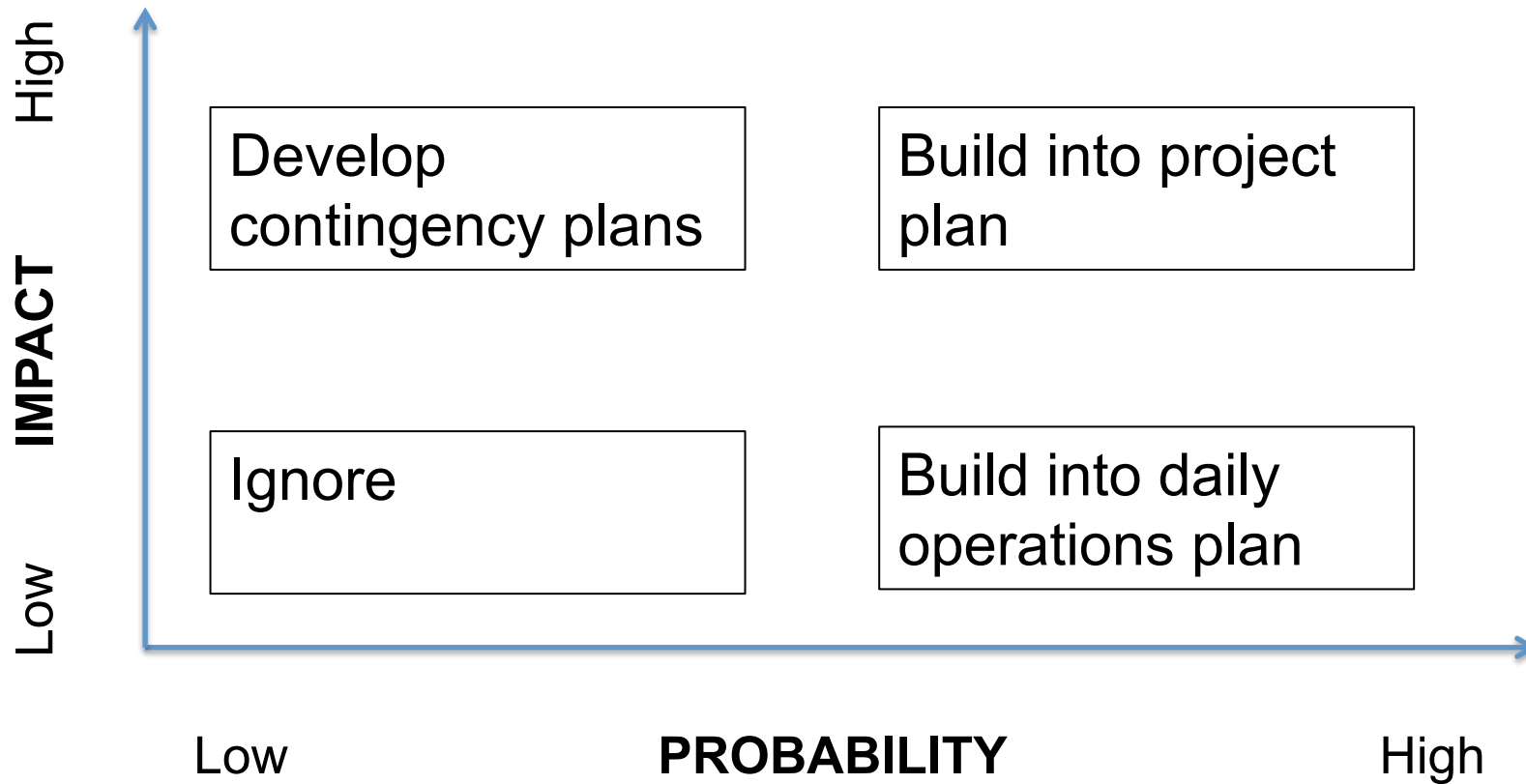


Risk Clarification Activity...cont'd

- **As a team**, rate the selected most important items for solvability according to the following:
 - **A**: could be resolved by the team
 - **B**: requires others (such as a higher level of management), but the team could influence the outcome
 - **C**: cannot be influenced by the team; thus, no effort should be wasted on the item



Probability vs. Impact



Project Charter

- AKA: statement of work, project definition, project plan, project overview
- Includes many of the aspects of planning that we talked about today—e.g., background, goals/objectives, stakeholders, constraints, success indicators
- A copy is available in your handout package



Group Sharing

- What is one tip that you have learned about project planning and execution (either here or at home) that you think would be helpful for the larger group to know? Please share.



Thank You

- Questions?
- Comments?

