

iDigBio Summit IV : Project Management, Administration, & Mentoring Discussion Group

Monday, October 27, 2014, 1:30pm - 2:30pm

Organizers: David Jennings, Tom Nash, Joanna McCaffrey

This group will discuss the importance of project management & administration in keeping your project on time and within budget. We will discuss lessons learned, what worked, and what didn't work based on your experience and then brainstorm new approaches. We encourage older TCNs to mentor & advise the younger TCNs.

Discussion Points

Here and Now: Safe environment to discuss, no blame

Project Management

- important to identify a suitable person (to skills and temperament) to manage a TCN
- a good project manager anticipates and plans for contingencies and risks - risk management plan
- strong communication plan, via various media to reach different kinds of people, including institutions and beyond
- lessons learned - what works, and what doesn't
- follow up from basics covered in the webinar, good foundation of skills
- flexibility in all aspects, not so schedule driven, more outcome driven

Administration

- getting and staying organized - project plan
- regular meetings, involve all stakeholders
- project interface with institutional procedures
- decisions - sometimes easier to beg for forgiveness than ask for permission

Mentoring - TCN to TCN (senior TCNs to freshmen)

- "Who ya' gonna' call?" This is important. Who do you know-love-trust to steer you down the path to success?
- reaching out - lessons learned - what works, and what doesn't, the failures are more insightful than the good news
- new approaches?
- knowledge transfer - workflows, best practices, techniques
- when is it time for TCN project management to take action with a participant who is not participating, and how? Can NSF provide assistance?

NSF's Role

- strategic direction for ADBC
- “the customer” - all of us must answer to NSF; NSF should help guide our activities and comment on our performance
- iDigBio is not the cop for NSF

iDigBio's Role in Providing Support to TCNs

- regular progress reports, which feed into annual reports to NSF
- workshops, webinars
- interest and working groups
- resources, e.g., AdobeConnect
- day-to-day clearinghouse of digitization community action, digitization workflow progress

Notes from discussion

- We need help in how to find other resources.
 - Communication without face-to-face meetings -- how to run effective on-line meetings. Tri-trophic TCN holds regular on-line meetings
 - How to centralize an on-line place for resources [a solution is the iDigBio wiki -- works for sharing data between Florida State and University of Florida]. There are some restrictions on the type of files that will upload to Wiki, but there are many accepted options
 - There is a project management resource page on the iDigBio Wiki. [Dave does a tutorial on using the Wiki]. There is no admin status -- if you have a login, you can upload/download a file.
https://www.idigbio.org/wiki/index.php/Project_Management_Resources
 - NEVP -- started a project management website using Open Atrium (<http://openatrium.com/#/>) -- a web-based project management software project. Has case management, calendar. Encouraged PIs to use blogs to report progress. Drupal based. Download software and install it.
 - TCNs have their own Wiki pages-- it's a template populated with data from the proposal, to which the project can make additions.
<https://www.idigbio.org/content/thematic-collections-networks>
 - TCNs should write, review, and agree on a formal project management plan, including communication plan, risk plan, metrics, responsibilities, title, timelines, schedule mitigation, etc. Need a good 'science project' template for a project plan.
 - Multiple approaches to management plans. David suggests the elements of a good project management plan are:
- What needs to be done?

- **Who** is doing the work?
 - How much will the work cost (**budget**)?
 - When will the work be done (**schedule, milestones**) how will the work be done?
 - How will you manage **communications**?
 - How will you manage **risk**?
 - How will you manage **change**?
 - What metrics will you use to track **progress, quality** and **scope**?
 - What are the internal and external **dependencies**?
- Tom recounts a story wherein the lead institution did not know exactly what some collaborators had turned with their budget. Opines that NSF should inform what is in the collaborative proposal. Responsibility of the Lead PI and the SRO to compile all the information from the collaborators
 - What to worry about in terms risks?
 - lack of reporting -- maybe NSF could help by reminding institutions that they need to submit report (continued support contingent on regular reporting).
 - Maybe all projects should have a dedicated project manager -- how many have one? a few do.
 - Project manager doesn't need to spend full time on administration -- can also participate in the digitization management.
 - Who to contact if you need help with a project management issue that is not in your TCN? Go to iDigBio first -- they are helpers not cops (try Larry or David).
 - Lead PI should work on delegating responsibilities, not so top-down.