

Guidelines for Managing A Long-Term Project

Before you begin

Do this as *early as you possibly can* when launching a new project.

Project Definition and Organization

1. Define the project

- What is the purpose of the project?
- What is the motivation for the project?
- What is the intended final product of the project?

2. Break down the project into components

- What are the major components of the project?
- What steps need to be accomplished in order to complete each component?
- Carefully lay out the interdependence of any project components. Do some components of the project rely on completion of other components? Are some components independent?
- Consider whether some components can be accomplished by individuals or require team work.

3. Define the resources required for each component

- Consider time, money, access to research space (labs, libraries, archives), access to databases, software, etc.
- Consider available expertise outside you/your team (PI, other lab members, class professor, etc. depending on the project).
- Define when and how will you use these resources.

4. Define your criteria for success in each component/step

- What are the standards for successful completion of each step
- What are the standards for successful completion of the project

Team Management

5. Define your goals

- What are the team members' *individual* priorities and goals? What does each team member want to get out of the project? These can include new skills, products, experience, etc.
- What are the team members' *group* priorities and goals? What does each team member want the group to accomplish? These can include skills, products, future collaborations, etc.
- How will you measure whether individual and group goals are met?

6. Assign roles

- Use your team's goals, skillsets, and scheduling constraints to decide who will do what.
- Assign individuals and teams project components/steps, *fairly*.

7. Discuss how you will handle deviations from the plan or team disagreements

- How will you decide whether and when to update or modify your plan or assigned roles?
- How will you handle disagreements about roles, goals, or procedures?
- How will you handle situations in which a team member is not meeting team goals or deadlines?

Timeline

8. Make a timeline

- When does each component need to be done?
- Take into account: how long each component is expected to take; which project components are dependent on the completion of other components; other responsibilities and deadlines that may be happening concurrently for all team members; limitations on access to required resources; etc.
- Be sure to include margins of error when possible

9. Decide how you will handle deviation from the timeline.

10. If this is a team project: schedule regular team check-ins into your project timeline

Optional: Seek out external accountability

11. Get an external evaluator

- This is someone who you can check in with outside of you/your team to evaluate the success of the project and provide advice. This can be your PI, class professor, or another professor or student outside of the project.
- Clearly define this person's role
- Decide when you will seek this person's evaluation (e.g. before, during, and/or after project completion).

12. Seek timeline accountability

- Give your timeline to someone outside of you/your team and ask them to hold you accountable for meeting your deadlines.
- **IMPORTANT:** This does not mean that this person is accountable if you do not meet your deadlines. Ask someone to do this **ONLY** if they are willing to do so to help you feel accountable, but do not expect them to do additional labor related to your project.

During the project

1. Continually evaluate project success

- Note what is going well and what is not on a weekly basis (with yourself or your team), and address any problems or deviations from the project goals or timeline (in the manner you decided on at the beginning of the project).
- Ask for help if you need it

2. Do a mid-project audit

- Do this when you are about half done with the project.
- Evaluate how well you have stuck to your timeline and accomplished your goals thus far.
- Determine whether goals or timeline need to be modified or updated.
- Evaluate your use of resources required for the project. Are you making efficient use of relevant resources?

After project completion

1. Evaluate the success of the project

- What was the outcome of the project?
- Did you meet your goals and criteria for project success?
- Did the outcome of the project meet your expectations?
- Optional: Meet with your external evaluator to discuss the project's outcomes

2. Self-evaluation

- Did you meet your individual goals for the project?
- What worked for you in administering the project?
- What would you do differently next time?

3. Team-evaluation (if relevant)

- Did the team meet their group goals for the project?
- What worked well for your team?
- What would you do differently next time?

4. Future directions

- If this project is part of a larger project or goal (e.g. a study in your dissertation), what are the next steps? How will this project support your future goals?