Project Coordination / Project Lead

Workshop 2021
hosted by CorrelAid, CorrelAid Switzerland & CorrelAid Netherlands

Agenda

Topics	Method					Time
Overview Project Process	💡	👥	✋	⇄	👓	17:00 – 17:15
Input Project Coordinator	💡	👥	✋	⇄	👓	17:15 – 17:45
Break			☕			17:45 – 17:50
Input Project Lead	💡	👥	✋	⇄	👓	17:50 – 18:20
Questions	💡	👥	✋	⇄	👓	18:20 – 18:30
Break		🍶	🍇	🏠		18:30 – 18:45
Interactive Part: different Break-out Sessions	💡	👥	✋	⇄	👓	18:45 – 19:45
Wrap-up, next steps	💡	👥	✋	⇄	👓	19:45 – 20:00

Legende: 💡 Input von CorrelAid 👥 Diskussion im Plenum ✋ Arbeit mit Coaches ⇄ Peer.-to-Peer Austausch 👓 Externer Input

Project Phases

	What	Duration	Main responsibility
Project acquisition	find potential partner organization	unknown	Project coordinator
Ideation	decide whether to do project, scope the project	1-6 weeks / 1-3 calls	Project coordinator
Team selection	send out call for applications via newsletter, select team	2-4 weeks	Project coordinator
Onboarding	setup project infrastructure, establish communication	1-2 weeks	Project coordinator w/ team lead
Kickoff	project team and NPO come together, marks start of project	1-3 hours / weekend	Team lead
Project work	The project team works on the project, regular exchange with NPO	1-6 months	Team lead
Handover	The project team hands over their work to the NPO	1-3 hour event	Team lead
Follow-up	Project coordinator follows up with team and NPO	-	Project coordinator

Why do we do it like this?
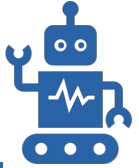
impactful

What we do helps the NPO with its mission and amplifies its impact

- ideation phase: does this project make sense? Will it help the NPO reach its goals better? -> often, NPO needs lots of help with this!
- project work: focus on helping the NPO, not on cool technology

useful and sustainable

The NPO is able to use the results of the project. The project has impact beyond its time frame.

- ideation phase: how will the end product look like? how does it fit in the existing infrastructure?
- project work: close feedback loops with NPO
- handover: ensure that NPO has all important information

feasible

The project is realistic to do with a skilled volunteering approach while also ensuring that everyone has a good learning experience.

- ideation phase: do we have necessary skills in our network? Find realistic scope and communicate clearly in call for applications!
- team selection: find capable and diverse team
- kickoff: enable everyone!

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Goal: Data4Good projects as a win-win situation

Volunteers: opportunity to apply and expand knowledge

NPO: gets help with their data challenge

Education first, Data4Good second!

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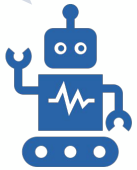
CorrelAid projects are varied

Legend:
- ideation phase, write call for applications
- collect applications, formal team selection + onboarding
- informal team selection (slack, personal connections..)
- kickoff event (1-3 hours)
- kickoff weekend (Fr evening + Sa)

	Q1			Q2			Q3			Q4		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Project cycle Q2												
CorrelAidX project outside project cycle												
urgent project outside project cycle												
Project cycle Q3												
informal internal project												

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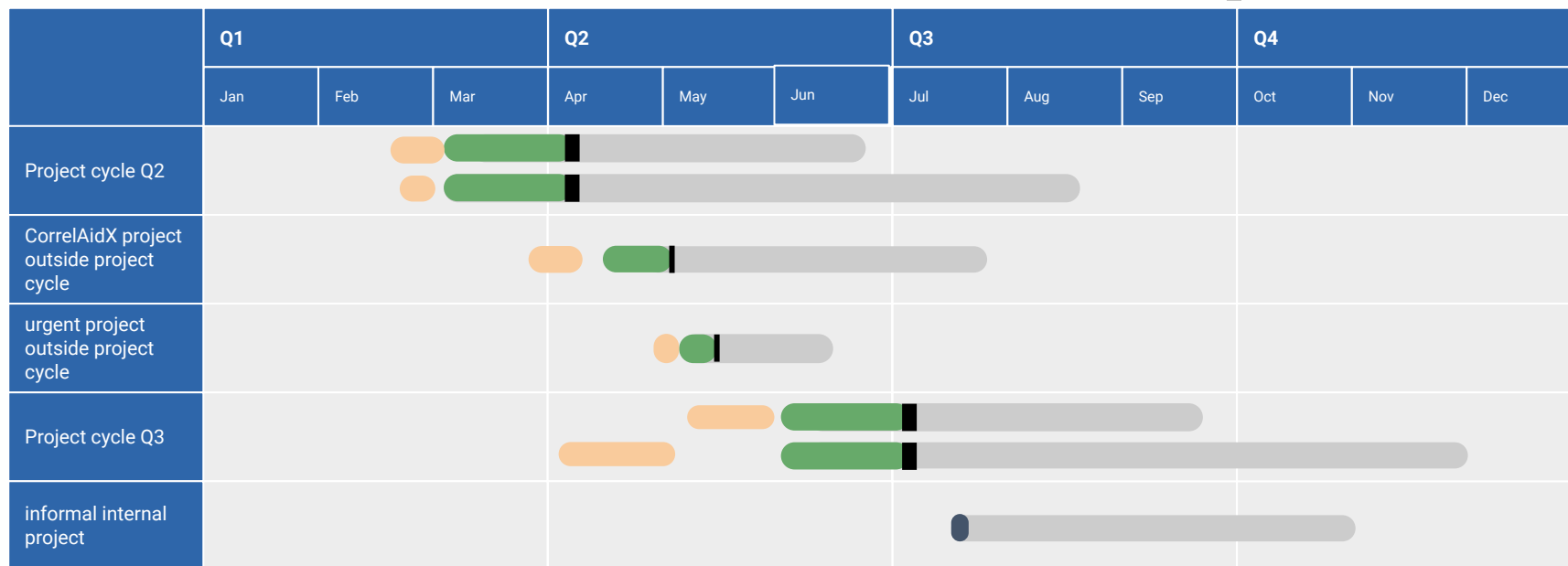
Project-cycle vs non-project-cycle projects

Project cycle

- pros
    - extended kickoff event
    - organization and support by Berliner Büro
    - educational material / webinars
- cons
    - less flexible
    - too much overhead for small projects

Projects outside project cycle

- pros
    - flexible start time
    - less rigid (team selection) processes
- cons
    - Berliner Büro cannot support as much
    - less content at kickoff
    - less visibility

Infrastructure / Tools

(Azure: Computing Resources)

Project coordination

Common

Project team

GitHub projects repository: project process tracking, Kanban board

CodiMD (pad.correlaid.org): notes, drafts

Slack: team channel for communication

Slack: exchange with the project team

CorrelCloud: data transfer, templates

VeraCrypt: Encryption

KoboToolbox for collecting applications

docs.correlaid.org: documentation

GitHub/GitLab: Version control, collaboration

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Input Project Coordinator

The project manual

docs.correlaid.org/project-manual

Project Manual

A manual for coordinators and leads of CorrelAid projects. But might be interesting to everyone else as well! This is still a work-in-progress.

→ **CorrelAid Data4Good projects**   /project-manual/data4good-projects

Project coordinator: enabling our projects

Project coordinators are most important at the **first stages of a project**, from the first contact of the organization with CorrelAid and **scoping the project** up until a team has been formed and it has started working. During the project work phase, the project coordinator gets updates from the project team to **ensure that the project is running smoothly**. After the project has been successfully implemented, the project coordinator is responsible for the **follow-up** with the organization and the project team.

communication
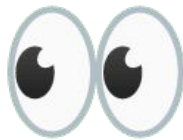
coordination/
organization

overview

time commitment: average ca. 2 hours per week, depending on project stage more or less

Where/how do you work?

(Azure: Computing Resources)

Project coordination

Common

Project team

GitHub projects repository: project process tracking, Kanban board

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KoboToolbox for collecting applications

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CorrelCloud: data transfer, templates

docs.correlaid.org: documentation

Slack: team channel for communication

VeraCrypt: Encryption

GitHub/GitLab: Version control, collaboration

Toolbox: https://docs.correlaid.org/project-manual/toolbox

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GitHub projects repository

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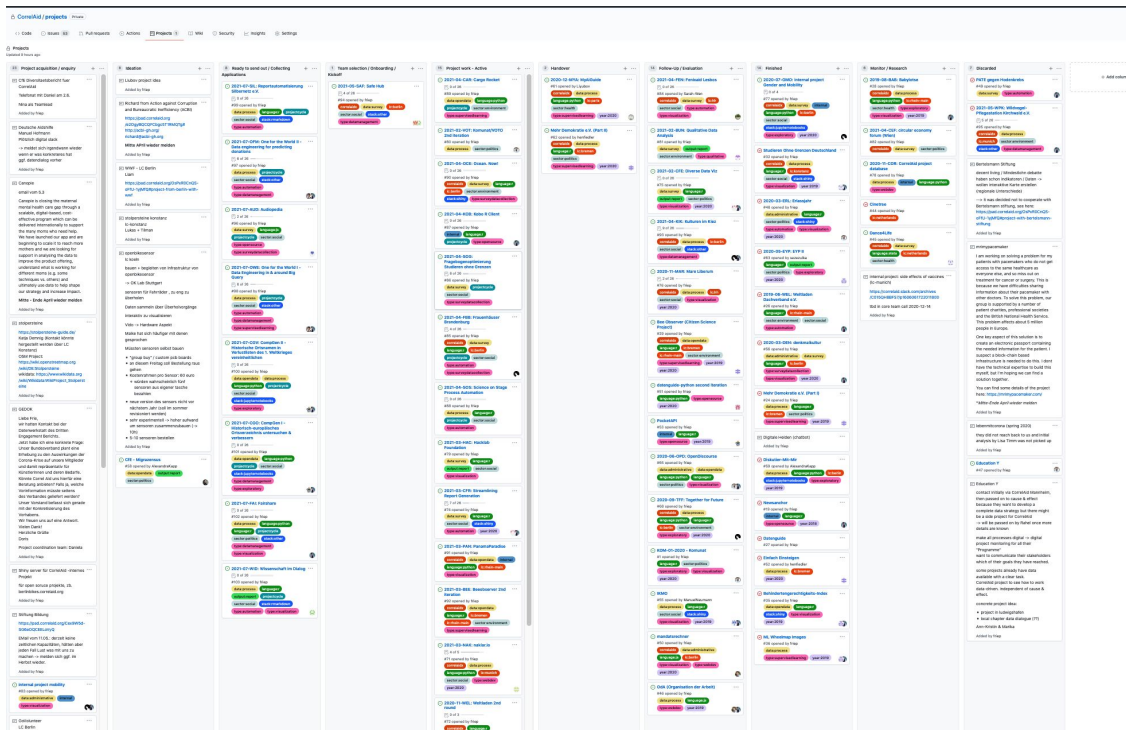
Ideation phase: talk, listen, understand, write

Goals

1. decide whether we should do a project with the organization
2. if yes, scope the project

How?

- 1-3 Zoom calls + emails
- final output: *Call for Applications* to send out via the newsletter

Resources!

- Ideation Template
- Calls for Applications Template

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When do we do a project? When not?

Overview of criteria

Category	Criterion	Main Question
Partner	legal form	is the legal form one we collaborate with?
Partner	financial situation	does the partner have money to pay someone for this?
Partner	purpose	is the partner aligned with CorrelAids values?
Project	educational factor	can our volunteers learn something in the project?
Project	for-good factor and ethical considerations	will this project have a positive impact for the partner and society as whole? will it cause no harm?
Project	sustainability	is the project sustainable for the partner?
Project	role of project in partner org	do we develop someone else's core product/project?

[Source](#)

- [extensive guide](#)
- the Core Team call (see #telko) serves as the **ethics committee**

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Scoping a project: Topics to discuss

– content and scope of the project

– expectation management & organization commitments

– data security / privacy & data access

– timeline

– team size & composition

Check out the ideation template
for a collection of questions

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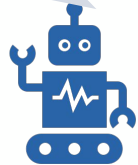
Why do we scope projects? (Andrew)

- Many NGOs believe Data Science Hype

- [Insert Big Number here]% of data projects fail

- Fix: Dehype while scoping, Scope small.

Link to the [sales workshop](#)

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Finding a team & team selection: organize and coordinate

Goals

1. find a diverse, capable team

How?

- find a committee (e.g. via Slack)
- reading the applications
- 1 Call with team selection committee
- contact rejected / selected applicants

Resources!

- Principles of team selection
- Templates for emails to selected/rejected applicants

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Application report

9 - female - team lead

Gender: female

Project role: team lead

What skills qualify you?

She contain reason carry light book. Resource rate system main help. Low next his such use son. He head water happen. World line personal sign city factor prepare. Certain stuff source down.

Why do you want to get involved?

Chair guy expect consumer. Medical town responsibility operation night for single watch. Get factor bit career event weight conference. Themselves among a.

Self-rated experience with skills, techniques and topics
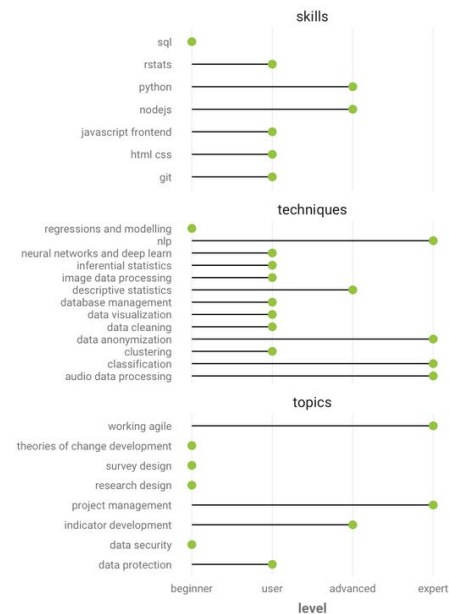
Onboarding: a lot of small coordination tasks

- setup tasks
  - create Slack channel and invite everyone
  - create CorrelCloud accounts if needed
  - ensure everyone has signed the data privacy statement
  - invite to GitHub repository
  - arrange the data transfer with the NPO via the CorrelCloud
- organize a handover call with the team lead
  - if possible, the NPO contact could also participate
  - if that's not possible, introduce the team lead via email to the NPO

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Kickoff

Goals: team and NPO get to know each other, team building, planning of project, enable project team to use tools

How?

- if project cycle project: nothing to be done
- if outside of project cycle: coordinate with the team lead, the NPO and the team
  - find a date (team lead can doodle in slack)
  - co-develop schedule for the call with team lead
  - you *should* participate in the kickoff as a host / moderator (especially at the start)

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Project work and handover

Goals: the project team implements the project in close exchange with the NPO and hands over the final product to the NPO

What do you do as a project coordinator?

- keep an eye out to see whether everything is going smoothly
- check in with the team lead from time to time
- check in with team trainee from time to time
- update the GitHub issue from time to time
- gently remind the team of the timeline if necessary

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Follow-up

Goal: the team gets to talk about the good they did in the project, we have some feedback from the team and the NPO

What do you do as a project coordinator?

- make sure that the project is properly followed up -> inform team about their responsibilities
- set up necessary infrastructure (pad, add project to feedback survey…)
- add the project to the website by adding it to the project db [1]

Resources

- Template Project Summary
- Feedback survey
- Follow up chapter in the project manual

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Follow-up tips

- sometimes hard to get team members to write a project summary: maybe do a follow-up interview with the team (lead) and write it yourself
- the podcast is a nice way to get exposure without having to do writing
- team could fill in the feedback survey as part of their final team call

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Summary Project Coordinator

- <u>What</u> do you do?
    - scope data science projects and make sure that they're impactful, useful, sustainable and feasible!
    - make sure that the project runs smoothly
    - project administration
- <u>Why</u> should you do it?
    - scoping projects is a very important skill
    - connect with cool NPOs and collaborate with like-minded volunteers
    - have an overview over project activities within CorrelAid and get insights into CorrelAids project infrastructure

Input Project/Team Lead

Why do we need this role?
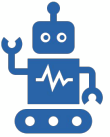
- every team is different, individuals with individual skill sets, ideas, backgrounds come together

- to make the most out of this knowledge accumulation, we need somebody who keeps the overview and orchestrates the talents and skills and that is ….. …. the team lead!

- You get the team started, keep the team together and acquire a lot of project management knowledge
  - learning from your experiences and exchanging on best practices will help us to constantly improve the process

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Team Lead - Tasks over time

Before Project Start	Onboarding	Kick-Off	Project Work	Hand-over and follow-up
sometimes: involvement in application process	set-up communication channels (slack, CorrelCloud)	Goal: team + NPO get to know each other, team building, project planning	make sure the working framework and team-spirit stays high	make sure NPO gets access to project results and knows how to maintain / adjust
supportive role for PC	supportive role for PC	shared responsibility with PC and NPO	your responsibility together with project team	your responsibility together with project team

Onboarding - Goals & Tools

Goals

1. team members can get into touch with each other
2. everybody gets access to data, inform members about data security and data privacy
3. all tools are set-up to start the project work
4. invitation for kick-off is sent out

Tools

1. create a private slack channel, add team members
2. set-up a CorrelCloud folder for data transfer, if necessary: declaration on data security 👤
3. create git repository and add members 👤

👤 there are instructions for this in the manual

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Onboarding - Soft Skills

- make sure to set-up tools on time to enable a smooth project start

- introduce yourself as the project lead to your team members
  - let them know they can turn to you in case they need support, have any difficulties

- encourage your team members to introduce themselves to each other
  - optional: get together within the team before the kick-off

- make sure to organize the kick-off in cooperation with PC on time

Kick-off invitations should be send out as soon as possible, at least 2 weeks in advance. It's a plus to introduce the agenda already
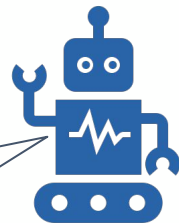
Onboarding - Definition of ready

- Does everybody have access to the data and tools?

- Are team members connected to each other / is the basis for a smooth communication set?

- Did everybody receive the kick-off invitation about 1-2 weeks ahead? (including a zoom link / a rough agenda that has also been sent to NPO)

- Did everybody sign the declaration on data security?

time required: approx. 2 hours

Kick-Off: Goals & Tools

The online version of the kick-off usually lasts 1-3 hours

In some cases the PC takes care of the Kick-Off but in case it's your duty, this is what needs to be done:
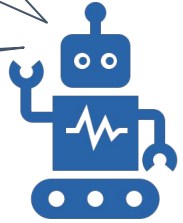
Goals

- who & what: team members get to know each other, the PC, the NPO and the details of the project
- how: understand what a CorrelAid project is like, agree and define a common working framework for the upcoming weeks

Tools

- make sure the privacy policy is signed by everybody
- get information from PC about the project
- prepare a short CorrelAid intro, introduce participants

Kick-Off: Soft-Skills

- make sure that the NPO and everybody else can properly introduce themselves and that all open questions are answered as far as possible

- make sure to keep the balance between organizing the team and allowing an interactive team building process

  - create space and time for a proper introduction: who are the other people? what are their skills, backgrounds and motivations? *
  - how do you, as a team, want to work with each other? *
    - make sure to note down the results of your discussion*

> * we will introduce some practical methods in the 2nd part of the workshop
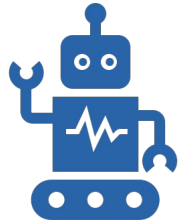
Kick-Off: Definition of Ready

- before the event: everybody is invited and has access to the event
- you have all relevant information on the NPO / the project / the team members
  - who is the NPO representative? Confirmed attendance?
  - all data is shared for a smooth project start? There is time to discuss open questions?
  - all team members know who you are? You are all connected via your private slack channel?
- Everybody has signed the declaration on data security?
- After the event: you know what the next steps are: the project timeline is roughly clear

time required: approx. 4 hours (including 3 hours of the kick-off itself)

Project Work: Goals & Tools

Goals:

1. smooth communication (within team and with NPO)
2. happy team members
3. project process, clear project timeline:
   a. start with the definition of the next 1-2 weeks and make sure to set-up the next clear date when to exchange on your working progress

Tools:

1. Still slack ;)
2. make use of regular feedback sessions / retrospectives to evaluate the team atmosphere and individual well-being
3. use some kind of collaborative kanban board, e.g. trello or GitHub projects

Project Work: Soft-Skills

- make sure the communication is running:
  - use slack to inform your team members about upcoming meetings
  - engage your team members to inform each other
  - use slack reactions to express you have read a message, you agree or intervene if there are things that need to be discussed

- make sure your working framework is followed by everybody:
  - do you have regular meetings, as agreed?
  - in case you decide on regular feedback sessions: are they organized properly (by you or someone else?)

Project Work: Definition of ready

- is every team member engaged in the project? If team member drop out (which can happen at any time) or if the workload is too high, talk to the PC in order to get more support/find new team members
- is the timeline respected?
- does the communication with the NPO works well? Are all questions answered in the process?
- is the working framework agreed on respected?
- are regular feedback sessions/ retrospectives happening?

time required: the specified project time per week, part of which involves approx. 30-40% administrative work on your part

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Hand-over and Follow up: Goals & Tools

Goals:

- the NPO gets proper access to the project results, including a well written documentation on how to change, adjust and maintain things
- documentation for CorrelAid internally (feedback on project work, best practices, etc.)
- communication for external purposes (blogpost, podcast, etc.)

Tools:

- Feedback survey ⊡
- project summary ⊡
- public project slides ⊡
- good idea: final internal team call to wrap things up

> The PC is responsible for this step on the organizational side, you and your team take care of the content

⊡ there are instructions for this in the manual
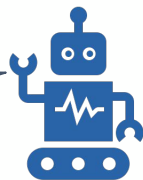
Hand-over & Follow-up: Soft-Skills

- reflect on your work realistically:
  - what went well, what didn't?
  - what are best practices you can recommend to future project leads / teams?

- When documenting for the public:
  - try to use an easy language
  - insert as many visualisations and practical insights as possible
  - have in mind: the more clearly we can present CorrelAid's work and the added value for the NPO, the more likely it is that future projects with other NPOs will come about

time required: approx. 1,5 hours (make use of the final team call, to get things done together as a group)

Summary Team lead / Project lead

- <u>What</u> do you do?
    - you bring the selected team together, making sure that you work well as a unit, while the individual talents and skills are also brought to bear
    - you ensure that the project runs smoothly - communicatively, on time and in a targeted manner
    - a nice kick-off, good project process, a complete follow-up in terms of content

- <u>Why</u> should you do it?
    - Leading a team with diverse talents is a challenging but **incredibly rewarding** job
    - Accompanying a project in such a way that in the end there is a great added value for the volunteers as well as for the NPOs is not only **meaningful**, but will also **develop you personally in many areas**, such as communication, project management and interpersonal relationships.

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Breakout sessions

2nd part: breakout rooms: 3x20 min

- team lead methods introduction: Isabel
    - motivation
    - diversity template
    - working framework
    - retro
- 1 Q&A / "stories" from project coordination: Andrew and Sebastian
- 1 guided tour of the project manual, the wiki and tools: Frie
- 1 Q&A / "stories" from project leads: Long, Alexis, Alina, Hauke, Alexander
- team lead methods - the whole spiel (**1 hour**): Yiran, Dennis

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Questions?