

# Tools for Managing Projects

NSF EPSCoR PD/PA/EOD

January 22, 2015

# Summary

- Using Google Services – Doug Byers
- Basecamp – Andrea Littlefield
- Trello – Marcie Jackson
- “Traffic Light” Analysis – Mary Jo Daniel

# MANAGEMENT TOOLS

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## Using Google Services

PD/PA/EOD Meeting – Honolulu Hawaii  
January 22, 2015  
Doug Byers (Kansas) [dbyers@ku.edu](mailto:dbyers@ku.edu)

# Overview

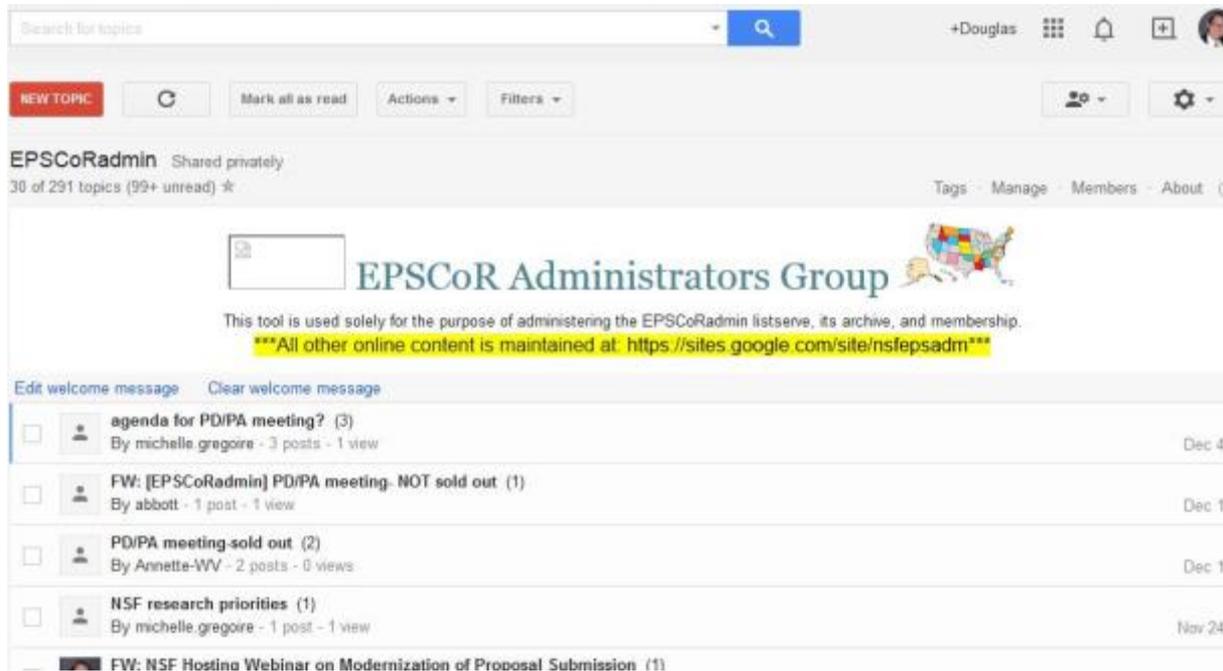
Google Free online collaboration tools for managing and organizing people, ideas and activities

- Groups
- Documents/File storage
- Forms
- Calendars
- Wiki/Websites (internet and intranet)

# People

## Google Groups (groups.google.com)

- Email distribution list
- Manage access to other services (via group address)
- User settings (email delivery, unsubscribe)



The screenshot shows the Google Groups interface for the "EPSCoR Administrators Group". At the top, there is a search bar and user profile information for "+Douglas". Below the search bar are navigation buttons: "NEW TOPIC", "Mark all as read", "Actions", and "Filters". The group name "EPSCoRAdmin" is displayed as "Shared privately" with "30 of 291 topics (99+ unread)". A welcome message is visible, stating: "This tool is used solely for the purpose of administering the EPSCoRAdmin listserv, its archive, and membership. \*\*\*All other online content is maintained at https://sites.google.com/site/nslepsadm\*\*\*". Below the welcome message is a list of recent topics:

Topic	Author	Posts	Views	Date
agenda for PD/PA meeting? (3)	By michelle.gregoire	3 posts	1 view	Dec 4
FW: [EPSCoRAdmin] PD/PA meeting- NOT sold out (1)	By abbott	1 post	1 view	Dec 1
PD/PA meeting sold out (2)	By Annette-WV	2 posts	0 views	Dec 1
NSF research priorities (1)	By michelle.gregoire	1 post	1 view	Nov 24
FW: NSF Hosting Webinar on Modernization of Proposal Submission (1)				

# Ideas

Google Docs (Drive, [www.google.com/drive](http://www.google.com/drive))

- Create, Share, Collaborate, edit in real-time
- Supports versioning



The screenshot shows a Google Docs interface. The document title is "Notes from PD/PA/EOD - Meeting Nov 7, 2013 - Nashville". The main content is centered and reads: "PD/PA/EOD Meeting Notes", "NSF EPSCoR National Meeting, Nashville, TN", "Thursday, November 7, 2013", and "PD Council Minutes". Below this, there are two paragraphs of text. The first paragraph discusses a motion by Gayle Dana regarding PD bylaw word confusion, which was passed by 25 votes. The second paragraph discusses the possibility of 2014 quarterly online meetings versus ad hoc meetings. A chat window is open on the right side, showing a conversation between "me" and "Doug Byers" at 11:54 AM. The chat window title is "(2) Doug Byers, Douglas Byers".

Notes from PD/PA/EOD - Meeting Nov 7, 2013 - Nashville

File Edit View Insert Format Tools Table Add-ons Help Last edit was made second

100% Heading 1 Trebuchet ... 16 B I U A More

1 2 3 4 5 6 7

**PD/PA/EOD Meeting Notes**

NSF EPSCoR National Meeting, Nashville, TN

Thursday, November 7, 2013

**PD Council Minutes**

Gayle Dana brought up the first item, a motion to make a change in PD bylaw word confusion. Voted and passed by 25 votes yes, zero for no, and zero abstentions. Moved, Fred Choobineh seconded, and the motion was carried.

2014 quarterly online meetings of the PD council had been suggested. It was suggested instead, ad hoc meetings can be called for emerging issues rather than committing regular meetings. Any PD can contact Gayle Dana (council chair) to bring up issues. This option is favored over having standing quarterly meetings.

PD/PA Meeting descriptions. Originated from Denise Barnes as a result of feedback

(2) Doug Byers, Douglas Byers

me 11:54 AM  
Start a chat.

Doug Byers 11:54 AM  
respond to chat



# Project Wiki

Google Sites ([sites.google.com](https://sites.google.com))

Integrate any/all services in one place online

- Store files
- Embed documents
- Calendars
- Discussions
- Blogs
- Lists
- Project Updates/Meeting notes

# Example: EPSCoRadmin

sites.google.com/site/nsfepsadm/

## NSF EPSCoR admin

- Home
  - About
  - Blog
  - Calendar
  - Directory
  - Discussion
  - Files
  - Members
  - Minutes
  - PA Leadership Committee
- ▼ EOD Community
  - EOD Blog
  - FAQ
- Sitemap

### 48

days until  
Winter EPSCoR PD/PA/EOD Meeting

January 22-23, 2015  
Hyatt Place Waikiki Beach Hotel  
Honolulu, Hawai'i  
[Info](#)

### Recent site activity

[Updated PD, PA, EOD List](#)  
edited by Douglas Byers

[Files](#)  
attachment removed by Douglas Byers  
attachment from Douglas Byers

[From the January 22-23, 2015 Meeting](#)

### Welcome...

...to the NSF EPSCoR Project Administrators information-sharing site. This is a closed site and you must be a member to post messages and access this site. If you know someone who would like to join, please direct them to the group's URL (<http://groups.google.com/group/epscoadmin?hl=en>) and have them "contact the owner" or have them send an email request directly to [dbyers@ku.edu](mailto:dbyers@ku.edu). For more information about this site [click here](#).

From this site you can:

- Ask a question or make an announcement to the group by using the "Discussions" tool
- See the [calendar of events](#) or [submit an event](#) to it (note: this is a public calendar, do not submit private events or information)
- View the [directory](#) of jurisdictional information
- View the [minutes](#) from the most recent PA meeting
- View the current [PA Leadership Committee](#)
- [Upload a file](#) you would like to share with the community (under construction)
- Update your personal [member profile](#) and change your subscription and message [settings](#)
- [HELP ME](#) with this "Google Group" thing!

New features will be added as we receive feedback. [Post your feedback as a discussion topic](#)

### What's coming up?

Today ◀ ▶ Friday, December 5 ▾

- Wednesday, December 24
  - Christmas Eve
- Thursday, December 25
  - Christmas Day
- Wednesday, December 31
  - New Year's Eve
- Thursday, January 1, 2015
  - New Year's Day
- Monday, January 19, 2015
  - Martin Luther King Day
- Thursday, January 22, 2015
  - Winter PD/PA/EOD Meeting
- Friday, January 23, 2015
  - Winter PD/PA/EOD Meeting
- Saturday, February 14, 2015

Events shown in time zone: Central Time

### Blog Announcements

#### NSF EPSCoR RII Track-2 Focused EPSCoR Collaborations

Dear Colleagues: Please note that the National Science Foundation (NSF) Experimental Program to Stimulate Competitive Research (EPSCoR) FY 2015 Research Infrastructure Improvement Track-2 Focus EPSCoR Collaborations (RII Track-2 ...

Posted Nov 18, 2014, 12:54 PM by Douglas Byers

[Updated PD, PA, EOD List](#) 12/4/2014 Doug Byers - I took the time to format

### EPSCoR News Feed

- » [MSU researcher investigates potential role for micro](#)
- » [Mount Marty College Receives STEM Research Fu](#)
- » [How the complexity of interfacial chemistry translat](#)
- » [EPSCoR Nevada seeks businesses wants to fund](#)
- » [Students Conduct EPSCoR Research on Natural D](#)
- » [Light Returns New Plastic to Atoms - The Maritime](#)

# Yes/No?

## Cons:

- Google login required
- Not a true project management tool
- Only useful if maintained
- Limited integration with other software

## Pros:

- Robust, flexible and collaborative
- Rich help resources
- Cloud-based, easy sharing
- Free

# QUESTIONS?

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# Maine NSF EPSCoR

## Tools for Managing Projects

PD/PA Meeting  
January 22, 2015  
Andrea Littlefield



## What's Basecamp?

Basecamp makes it easy for people in different roles with different responsibilities to communicate and work together. It's a place to share files, have discussions, collaborate on documents, assign tasks, and check due dates. Basecamp stores everything securely and can be accessed at anytime from anywhere.



70765/



ALL PROJECTS

**SEANET - ALL Hands** ☆

Last updated on Jan 5



**SEANET Management Team** ☆

Last updated Wednesday at 4:15pm



**SEANET Stewardship Council** ☆

Last updated Friday at 3:14pm



[Watch a quick video about the Projects page](#)



Basecamp [New stuff!](#)

[Projects](#)

[Calendar](#)

[Everything](#)

[Progress](#)

[Everyone](#)

[Me](#)

[New features](#) [Sign out](#)

## SEANET Management Team ☆

[Invite more people](#)  
14 people on this project

[Catch up](#)  
on recent changes

[138 Discussions](#) [4 To-dos](#) [125 Files](#) [1 Text document](#) [Events](#)

### Latest project updates

- Jan 7** Paul A. posted a message: [Management Team meeting notes: 1/7/15](#)
- Jan 6** Paul A. posted a message: [Management Team Meeting - 1/7/15: 1-3pm](#)
- Jan 5** You commented on [Upcoming Management Team Meeting: January 7](#)

[See all updates](#)

### Discussions

- |   |  |   |                              |
|---|--|---|------------------------------|
|  | Paul A. <b>Management Team meeting notes: 1/7/15</b> - Dear Management Team - I'm posting Stephanie's notes from today's meeting. We did not get to everything but made some | <a href="#">edit</a>  | Jan 7                        |
|  | Paul A. <b>Management Team Meeting - 1/7/15: 1-3pm</b> - Attached is the agenda and several handouts for tomorrow's management team meeting. I know David                    | <a href="#">edit</a> <a href="#">edit</a> <a href="#">edit</a> <a href="#">edit</a> | Jan 5                        |
|  | Andrea L. <b>Upcoming Management Team Meeting: January 7</b> - Yes, this meeting is scheduled to meet in the Corbett Hall Conference Room on the 4th floor.                  |   | Jan 5 <span>1</span>         |
|  | Barry C. <b>Dear Team I will be in the mountains next week....</b> - Dear Team I will be in the mountains next week, sorry. Happy Everything to Everyone!                    |   | Dec 18, 2014                 |
|  | Krish T. <b>Next Management Team meeting: 12/18: 10am</b> - Paul, I can do Monday at 9 am. I will need to leave at 10 to drive to Portland. Krish                            | <input type="checkbox"/>  | Dec 17, 2014 <span>15</span> |

[133 more discussions](#)

### To-do lists

[Watch a quick video about To-Do Lists](#)

### Management team development

- Order copy(s) of "Escape the Ivory Tower" [1 comment](#) [Anne Langston](#)
  - Develop protocol for communication with the press [Andrea Littlefield](#)
  - Develop faculty agreement [Paul Anderson](#)
  - Develop document outlining expectations from researchers [Paul Anderson](#)
- [Add a to-do](#)



Prices start at just \$20/month.

Every customer gets a **no-obligation, 60-day unlimited-use free trial.**

Visit [www.basecamp.com](http://www.basecamp.com) for more information

- Team members can connect regardless of location or organization
- Email notifications anytime something is posted (can chose to aggregate for the day or week)
- Opportunity for discussions
- Cloud based, easy sharing
- Value added: shared calendar, To Do lists,



- No file-type organization of documents
- No integration with other software programs
- Difficult to get people to use

Want more information?

Feel free to contact me!

Andrea Littlefield

Maine EPSCoR at the University of Maine

[andrea.littlefield@maine.edu](mailto:andrea.littlefield@maine.edu)

207-581-2289



Questions?

Nevada System of Higher Education Sponsored Programs



<https://trello.com/>

Marcie Jackson  
Nevada EPSCoR Project Administrator

# What is Trello?

- ❑ A Trello board is a list of lists, filled with cards.
- ❑ Open a card and you can add comments, upload file attachments, create checklists, add labels and due dates, and more.
- ❑ You can **invite as many people to your board as you need**, all for free.
- ❑ **Drag and drop** people to cards to divvy up tasks. Everyone sees the same board and the whole picture all at once.



### To Do - Lower Priority (within the next three months)



Please add the December Highlights to the About Us page on the main website (attached is the small jpg image and the highlight pdf) Also, is this page active <http://epscorspo.nevada.edu/about-us/epscor-highlights/>? I don't see it from the dropdown (perhaps we don't need it). If we do, then please change the look of the highlights page to be the same (little images like on the About Us page)

2 2



Add to the sidebar on NEXUS

### To Do - Medium Priority (within the next month)

Revamp Nexus Website (new template)

2 1 0/3 Jan 15



nvsolarnexus.org: Please setup a page for the upcoming February annual meeting External Advisory Committee per Gayle's design example that would look like this <https://sites.google.com/site/beaconeacmeeting2014/> We will use this page as a template for other meetings and/or reports in the future as well.

2 Jan 15



epscorspo.nevada.edu: Make the news section on the homepage like

### To Do - Top Priority (within one week)

SmugMug - Login and Password

1



Wordpress Templates

8



epscorspo.nevada.edu: Add content to newly created NSF Tri-State Consortium Page

2 8/8



Add a card...



## Review for compliance in list [Products](#)



Due Date

**Jan 16 at 12:00 PM (due soon)**

[Edit the description...](#)



### Checklist

[Delete...](#)

0%

[@robingonzales](#) review all required fields have been filled out

Marcie review

[@robingonzales](#) follow up w/researchers on missing fields

[Add an item...](#)



### Activity



Write a comment...



**Marcie Jackson** added this card to Products and added Checklist.

Jan 12 at 10:34 am

### Add

**Members**

**Labels**

**Checklist**

**Due date**

**Attachment**

### Actions

**Move**

**Copy**

**Subscribe**

**Archive**

[Share and more...](#)

### Top 3 Tasks

- Develop EAC Google Site for upcoming NEXUS Annual Meeting  
3:28 Jan 7
- Go through the whole Nexus website to be sure I didn't miss any content
- Pull content for the homepage on the Nexus redesign and send to Cynthia at Image

Add a card...

### Next Action Tasks

- Email Jaci to reach out regarding Nexus 101. Tell her it will take a week to develop, if she could give me her timeframe to target so that I can budget my time accordingly
- Adjust the Nexus Orange image to have white lettering
- Pull latest Annual Meeting registration list before 9:00 am on Friday for meeting with Marcie  
Jan 9
- Send Lori an email regarding requirements for laptop Large screen, 10-key, software etc - what are my needs?
- January 12-13, 2015 UNLV's 3rd annual stem summit stem.unlv.edu Send out on Twitter
- Update the Tri-State IWG solicitation on the website and send out through Constant Contact (Marcie's email)  
Jan 9
- Update Board of Regents in Constant Contact per John's email  
Jan 9
- Update Seed Grant Solicitations on the NEXUS website per Marcie's email  
Jan 9
- Schedule NASA Hill Visits  
2 Jan 15
- Schedule EPSCoR Hill Visits  
1 2 Jan 15
- Meet with Laura for website(s) training. End result create small handbook.

Add a card...

### Project List

Solar Nexus Website Redesign  
Jan 30



Design an image that can be a poster for the Annual Meeting that shows how an EPSCoR award is different than a regular NSF award. Also, how the teams interact and how everyone is responsible to meet with stakeholders, etc.  
1

Create Constant Contact templates for NSHE SSPO, Nevada EPSCoR, NASA Space Grant Consortium, NASA EPSCoR  
1

Follow Up with the 3 NASA students who were helped by NASA EPSCoR to participate in Summer 2014 internships.  
012

Go through the bounced back emails and correct the appropriate listserves

Create poster and handout (1 page both sides) on what it means to be a "participant" is an EPSCoR Cooperative Agreement award -- Like the participation pages of the Idaho welcome packet.

Update Strategic Plan to get rid of all the funky formatting  
014 Jan 15

Add a card...

### Waiting For

Jaci to send powerpoint and survey questions. Then, I will convert it to the Nexus powerpoint template and will post on the website. I will setup a survey link that will collect recipients information and their answers to your questions at the end of the presentation. I will design a simple certificate of completion. In the "thank you for participating" screen at the end of the survey, I will let the participants know they will receive a certificate of completion by email.

Sent Megan an email on 1/5/15 to update the Boehm video to say What problems are... instead of What problems is... per Gayle's request. I changed the wording on the website now just waiting for it to be changed on the video

Add a card...

### Someday/Maybe

Snap Video's - With Fred Harris as the interviewer over the next 2 years. 1 minute video's

Add a card...

### Meeting Notes

Stakeholder Steering Committee Meetings  
1

Add a card...

### Future Items to Remember

IMAGINE - 6 month plan notes  
413

GOALS  
015

Add a card...

# Resources Needed

- All online--no specialized software
- Can be used with any email provider
- Free version is very robust
- Can pay for an upgrade to create custom graphics and have larger attachment capacity

# Pros

- ❑ Very visual
- ❑ Easy to move items-cards move among categories
- ❑ Can individualize the look with colors and graphics
- ❑ Syncs across platforms and devices--notifications
- ❑ Reduces email chains--keeps information in one place
- ❑ Easy integration into calendar

# Cons

- ❑ As with any project management tool, you must consistently use it
- ❑ Some team members are not comfortable with the technology

Questions?



# Management NM Style

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Mary Jo Daniel, Associate Director  
PD/PA Meeting: January 22, 2015

# Tracking Progress and Accountability

## “TRAFFIC LIGHT” ANALYSIS

- Display data related to metrics in Strategic Plan in visually compelling way
- Share info with all project leads
- Faculty want to be and be seen as productive
- Can update and repeat as needed



# Determine criteria and components

WHAT IS IMPORTANT TO TRACK NOW?

<b>Component</b>	<b>Spending</b>	<b>Hiring</b>	<b>Publications</b>	<b>Proposals</b>	<b>Conference Presentations</b>	<b>Inter-institutional coordination</b>	<b>Leadership</b>
Research Area 1							
Research Area 2							
Research Area 3							
Research Area 4							
Research Area 5							
Research Area 6							



# Stoplight Analysis Sample

EARLY IN THE PROJECT

Component	Spending	PostDoc/ Student Hires	Publications	Proposals	Conference Presentns	Inter- institutional coordination	Leadership	Notes
Research 1	Yellow	Green	Green	Green	Green	Yellow	Green	1, 2, 8, 11
Research 2	Yellow	Green	Yellow	Red	Yellow	Green	Green	1, 2, 3, 5, 7
Research 3	Yellow	Yellow	Red	Red	Yellow	Red	Red	2, 3, 4, 6, 7, 9, 10, 11
Research 4	Yellow	Green	Green	Green	Green	Green	Green	1, 2
Research 5	Yellow	Yellow	Red	Green	Red	Red	Red	1, 2, 6, 9, 10, 11
Research 6	Yellow	Yellow	Red	Red	Yellow	Red	Yellow	1, 2, 4, 6, 7, 9



# Management

## “TRAFFIC LIGHT” ANALYSIS

April 2014

Spending	PostDoc/ Student Hires	Publications	Proposals	Conference Presentns	Inter- institutional coordination	Leadership
Yellow	Green	Green	Green	Green	Yellow	Green
Yellow	Green	Yellow	Red	Yellow	Green	Green
Yellow	Yellow	Red	Red	Yellow	Red	Red
Yellow	Green	Green	Green	Green	Green	Green
Yellow	Yellow	Red	Green	Red	Red	Red
Yellow	Yellow	Red	Red	Yellow	Red	Yellow
Yellow	Green	Green	Green	Green	n/a	Green

August 2014

Spending	PostDoc/ Student Hires	Publications	Proposals	Conference Presentns	Inter- institutional coordination	Leadership
Green	Green	Green	Green	Green	Green	Green
Green	Green	Yellow	Yellow	Green	Green	Green
Green	Green	Yellow	Yellow	Yellow	Green	Green
Green	Green	Green	Green	Green	Green	Green
Yellow	Green	Red	Green	Yellow	Green	Yellow
Yellow	Green	Red	Red	Yellow	Yellow	Yellow
Yellow	Green	Yellow	Yellow	Green	Yellow	Yellow

May 2014

Spending	PostDoc/ Student Hires	Publications	Proposals	Conference Presentns	Inter- institutional coordination	Leadership
Yellow	Green	Green	Green	Green	Green	Green
Yellow	Green	Yellow	Red	Green	Green	Green
Yellow	Yellow	Yellow	Yellow	Yellow	Green	Yellow
Yellow	Green	Green	Green	Green	Green	Green
Yellow	Yellow	Red	Green	Red	Yellow	Yellow
Yellow	Yellow	Red	Red	Yellow	Yellow	Yellow
Yellow	Green	Green	Green	Green	n/a	Green

	April	May	August
WFD Projects	Green	Green	Green
	Green	Yellow	Green
	Yellow	Green	Green
	Yellow	Green	Green
	Red	Red	Yellow
	Green	Yellow	Green



# You need data to make it work

## “TRAFFIC LIGHT” ANALYSIS

- ER Core
  - Data on outputs and activities can be updated by participants any time, all the time
- Financial reports
  - Monthly reconciliations of internal departments and subawards
- Anecdotal knowledge
  - Regular contact to know what's going on



# Benefits and Limits/Costs

## “TRAFFIC LIGHT ANALYSIS”

- Easy to see potential and real problems
- Encourages frequent reporting and invoicing
- Transparency and knowledge of the project across components
- Not static; can alter what is tracked as needed
- Frequent tracking of data by admin
- Individuals may take information *too seriously*
- Some aspects rely on judgment, not quantitative data
- “Calls out” under-productive leaders





# Questions?

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